Induction Checklist

This checklist should be used for any employee or agency worker starting a new job or transferring to another post within the council. Managers should complete each section with the new employee or agency worker. The form can be completed electronically or manually.

The checklist is split into different sections with guidance on timescales to complete. Work through the checklist and tick each section once completed. If any of the points are not relevant, please mark n/a.

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| **Employee/Agency Worker name** |  | | | |
| **Start date** |  | | | |
| **Job title** |  | | | |
| **Service grouping** |  | | | |
| **Manager name** |  | | | |
| **Manager job title** |  | | | |
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| **Date checklist completed** |  | | | |
| **Date uploaded onto MyView** |  | | | |
| **Signature of employee/agency worker** |  | | | |
| **Signature of manager** |  | | | |
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| **Prior to starting** (to be completed by the manager) | | | | |
| Arrange equipment/PPE e.g. ID badge, parking permit, uniform, mobile phone, laptop/tablet, keys, office equipment | |  | Contact new started to discuss start date and arrangements for day one (including reasonable adjustments) |  |
| Arrange telephone extension | |  | Arrange for access to required systems/folders |  |
| Arrange annual leave card | |  | Arrange email account |  |
| **Day One** | | | | |
| General introduction to colleagues | |  | Explanation of the induction programme |  |
| How to access the [Health and Safety Handbook](http://intranet/Pages/Healthandsafety.aspx) | |  | Fire evacuation procedure / firefighting equipment |  |
| Layout of premises (access, fire exits, assembly points / prohibited areas | |  | First aid arrangements |  |
| Car parking arrangements – parking badge | |  | Make arrangements for any reasonable adjustments and Access to Work application (if not already made) |  |
| Facilities for refreshments e.g. canteen and service rooms | |  | Personal Emergency Evacuation Plan PEEP undertaken if required |  |
| Issue leave entitlement card and explain how to book annual leave | |  | Agreement of when reasonable adjustments and PEEP will be reviewed |  |
| On provision of ICT equipment, explain employee responsibilities under the [Information Security Policy](http://intranet/Pages/Informationsecurity.aspx) | |  | Who to notify of changes in personal circumstances (name, address, bank account details etc.) |  |
| Attendance Management – What to do and who to report to | |  | Personal security including lone working procedures |  |
| Details of the council’s [Code of Values, Behaviours and Conducts](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=1742) | |  | Security of personal belongings |  |
| Toilets / restrooms / prayer rooms / facilities for breastfeeding mothers | |  | How and to whom to make wage or salary queries (Payroll helpline 03000 264321) or email  Regeneration and Local Services [HRREAL@durham.gov.uk](mailto:HRREAL@durham.gov.uk)  Adults and Health Services  [HRAHS@durham.gov.uk](mailto:HRAHS@durham.gov.uk)  Children and Young People’s Services  [HRCYPS@durham.gov.uk](mailto:HRCYPS@durham.gov.uk)  Resources  [hrresources@durham.gov.uk](mailto:hrresources@durham.gov.uk)  Transformation and Partnerships  [HRTAP@durham.gov.uk](mailto:HRTAP@durham.gov.uk) |  |

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| **Week 1** |

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| 1. **Welcome to the council** | | | |
| Awareness of council structure and services |  | Discuss role of your service |  |
| Discuss roles within your team | | |  |

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| 1. **Job In More Detail** | | | |
| Discuss role of employee – job description and work allocation arrangements |  | Confirm hours of work (including flexible working recording system) |  |
| Communications media (team meetings, one to ones, intranet, e-mail, Buzz, Service newsletters etc.) |  | Guidance on using ICT and other equipment |  |
| Introduction to the intranet including telephone directory, service home page, policies and procedures and search facility |  | Office systems and protocols e.g. telephone and email, location of equipment, sending/receiving post, financial systems and regulations etc. |  |
| Provide details of how to access [My View](http://www.durham.gov.uk/MyView) |  | If transferring from another service grouping, check and update MyView |  |
| Develop a programme for meeting key contacts and colleagues |  | Details of salary payment/accessing payslip through MyView |  |
| Confirm arrangements for supervision/ one to one sessions/observations/job chats |  | How to complete and submit mileage forms through MyView |  |
| Arrange mentor/buddy (if applicable) |  | Initial objectives |  |
| For probationary period agree dates on which to review job performance at 3 months and at least one month prior to 6 months of employment.  3 month date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 6 month date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | |  |

[Performance and Development Review Form - Induction](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=3788)

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| 1. **Health and Safety** | | | |
| Reporting procedures for formal accidents/incidents |  | Security arrangements |  |
| Provide information about the Occupational Health Service |  | Relevant risk assessments |  |
| Access to support services including telephone counselling and information service |  | [Young Person risk assessment](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=1574) completed if employee is under the age of 18 |  |
| [Display Screen Equipment (DSE) Assessment](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=1574) completed  **(It is essential that this is completed on Day 1 if the employee has a disability)** | | |  |

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| 1. **Training** | | | |
| Corporate Induction e-Learning | | |  |
| Information Security e-learning course |  | GDPR e-learning course (or workbook if no ICT access) |  |
| Harassment and Victimisation e-learning course |  | Diversity, Equality and Discrimination e-learning course |  |
| Attendance management e-learning  (managers only) |  | Recognising and managing stress in the workplace  (managers only) |  |

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| **The First Six Weeks** |

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| 1. **The Organisation** | | | |
| Awareness of council vision and values and behaviours |  | Awareness of the Council Plan |  |
| Awareness of your Service Plan |  | Awareness of your Team Plan |  |
| Awareness of the Committee structure |  | Where to find information relating to the [County Durham Partnership](http://www.countydurhampartnership.co.uk/) |  |
| Where to find information relating to the [Local Councils Charter](http://www.durham.gov.uk/article/1957/Durham-Local-Councils-Charter) |  | Where to find information relating to the [Sustainable Community Strategy](http://www.durham.gov.uk/article/2470/Sustainable-Community-Strategy) |  |

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| 1. **Training and Development** | | | |
| Prepare list of additional training needs following Induction appraisal |  | Mandatory training and enrolment procedures discussed |  |
| How support, advice and training will be given and by whom |  | Corporate Induction e-learning course (or workbook if no ICT access) completed |  |
| \*\*\* You must inform your Service Learning and Development Team as soon as possible to gain access to the e-learning package/workbook. Your manager will be able to advise you who to contact. \*\*\* | | | |

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| 1. **For managers** | | | |
| Financial Awareness training |  | Health and Safety training |  |
| Corporate Attendance Management e-learning training (mandatory for fourth and fifth tier managers) |  | Recognising and Managing Stress in the Workplace e-learning training (mandatory for fourth and fifth tier managers) |  |
| Performance and Development Review training |  | Corporate Recruitment and Selection training (mandatory for Lead Officers) |  |

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| **Key Council Policies** |

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| **Employees should be informed about the following policies and where they can be accessed…** | | | |
| [Additional Annual Leave](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=1740) |  | [CCTV Policy and Code of Practice](http://intranet/Pages/Informationmanagement.aspx) |  |
| [Childcare Vouchers](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=1741) |  | [Corporate Complaints Policy](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=2357) |  |
| [Vetting Policy](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=1744) |  | [Data Protection Potential Breach](http://intranet/Pages/Informationmanagement.aspx) |  |
| [Data Protection](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=2835) |  | [Disciplinary](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=1746) |  |
| [Dismissal Policy](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=1747) |  | [Drugs, Substance and Alcohol Misuse Policy](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=1748) |  |
| [Early Retirement](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=1598) |  | [Equality and Diversity Policy](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=1161) |  |
| Exit Policy |  | Flexible Working |  |
| [Flexitime Policy](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=1752) |  | [Resolution Policy](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=1753) |  |
| [Freedom of Information (Information Management)](http://intranet/Pages/Informationmanagement.aspx) |  | [Homeworking Policy](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=1603) |  |
| [Health and Safety](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=1567) |  | [Asset Control](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=2343) |  |
| [ICT Standard Operating Procedures](http://itlanding.wp-sites.durham.gov.uk/) |  | Maternity Adoption, Paternity and Shared Parental Leave |  |
| [Job Share](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=1756) |  | [Pay Protection](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=1758) |  |
| [Mental Wellbeing in the Workplace](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=1765) |  | [Records Management (Information Management)](http://intranet/Pages/Informationmanagement.aspx) |  |
| [Personal Information Security Policy](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=2341) |  | [Personal Use of Social Media](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=2531) |  |
| [Recruitment and Selection Policy](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=1759) |  | [Redeployment Policy](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=1760) |  |
| [Right to Work in the UK](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=1867) |  | [Attendance Management](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=3495) |  |
| [No Smoking](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=1764) |  | [Violence and Aggression](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=1801) |  |
| [Corporate Risk Management Framework](http://intranet/Pages/Corporaterisk.aspx) |  | [Information Security Policy](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=2339) |  |

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| **Employees should be informed about the following guidance doccuments and where they can be accessed…** | | | |
| [Adverse Weather](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=1773) |  | Agency Workers Regulations – Managers Guidance |  |
| [Annual Leave](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=1768) |  | [Confidential Reporting Code](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=1743) |  |
| [Constitution of the Council](http://www.durham.gov.uk/constitution) |  | [Performance Appraisal](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=1769) |  |
| [Customer First Strategy and Customer Services Charter and Standards](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=2755) |  | [Fixed Term Employees](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=1621) |  |
| [Freedom of Information / Environmental Information Regulations Procedures](http://intranet/Pages/Informationmanagement.aspx) |  | [Corporate Guidance for the application of the Regulation of Investigatory Powers Act](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=1024) |  |
| [Retention Guidelines for Council Records](http://intranet/Pages/Informationmanagement.aspx) |  | [Secure Handling and Transit Guidance of Paper Records](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=2720) |  |
| [Safend – USB Memory Stick User](http://intranet/Pages/PoliciesandProceduresDetails.aspx?ItemId=2722) |  | [MyView Mileage and Expenses Guidance](http://www.durham.gov.uk/MyView) |  |
| [MyView User Guide](http://www.durham.gov.uk/MyView) |  | [MyView Leave Management Guidance](http://www.durham.gov.uk/MyView) |  |
| MyPeople User Guide |  | [MyView Performance and Appraisal Module User Manual](http://www.durham.gov.uk/MyView) |  |
| [MyWorkforce](http://teams.durham.gov.uk/sites/mw/Guides/Forms/AllItems.aspx) | | |  |