

# An Induction Checklist for new staff in an organisation

Helping employers make the induction process as easy and supportive as possible



## REMEMBER

We are always here to help if you need us. We are just a phone call or an email away.



Starting a new job is quite often a poignant and potentially life-changing experience for many employees. They might have simply moved organisations, they might be returning to work after a few years off or it might be their first job out of Education. Regardless of their employment history, employers should try to make the induction process as easy and supportive as possible.

Employers have a responsibility to address particular tasks and actions at different stages of the induction process. Line managers should oversee an employee's induction and should both be up to date on what has or hasn't been completed on their checklist.

But, this checklist is intended to be used as a support tool to make your induction process as simple and helpful as possible. All things on this checklist will provide benefit to both the employee and the manager/employers. It can also highlight any areas that need attention or any additional support that is needed.

A checklist should have the input of your HR department, employer and the manager of the department you're hiring in. You might also involve other staff like employee representatives, training officers, Mental Health First Aiders, Health & safety officers, and others.

While this checklist provides a good starting point and outline of the things you might want to consider, you should adapt your checklist to the needs of your organisation and the role you're inducting.

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Print off the grid part of this document (Page 3-10) and work through it to find out if your organisation completes these tasks. If concerns are raised on any of the fields, you should do all that is reasonably practicable to sort out the issue as soon as possible.

**Disclaimer** - *this checklist is not a definitive list and Induction responsibilities/ duties vary depending on the type and size of businesses. This checklist is to be used as rough guidance only. iHASCO assumes no responsibility for errors or omissions in the contents of this document.*

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Employee:	Job Title:
Start date:	Date induction completed:

## First Day:

Task	Any other staff required	Date to be completed	Comments
Welcomed into the workplace (Could be virtually due to COVID or homeworking)			
Show employee their workspace (Not necessary for homeworkers)			
Introduce the employee to their team and line manager (if not doing the inducting)			
Introduce them to their 'buddy' or 'mentor' if applicable			
Show the employee the rest of the workplace and introduce other senior managers			

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Provide the employee with any essential information like door codes, security passes, parking restrictions/passes, P45's, bank details and NI numbers, key contacts e.g. IT department			
Note down employees registration			
Make sure you have employees emergency contacts			
Outline health & safety and workplace policies			
Provide information on social aspects like lunch breaks, facilities, canteens, clubs etc			
Ensure the employee has anything else they might need to carry out work e.g. notepads, pens, laptops, etc.			
Give the employee their induction pack/staff handbook (if you have one)			

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## First Week:

Task	Any other staff required	Date to be completed	Comments
Give the employee a brief history of the company, including your missions, vision and values			
Introduce the employee to other departments and employees			
Give them a more in-depth understanding of what the other departments do within the business and who's who. This might involve a sit down with the manager of each department			
Discuss the organisation's commitment to equal opportunities and diversity			
Discuss any future/developmental plans the employee has			
Ensure employee understands their job role and how it fits into the wider business			
Show employee what is expected of them and what they can expect from you			

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Outline how performance might be assessed and any training they require			
Outline any possible opportunities they might be offered in the future			
Outline the terms and conditions of employment and ensure they understand them and have access to a copy of them			
Make sure the employee is aware of any probationary period			
Make sure the employee knows their holiday entitlement, breaks, hours, wage and payment dates and has access to any of the relevant documents			
Do you offer a pension scheme - show employees the relevant information			
Discuss the rules surrounding absence, discipline, complaints against staff and job performance (and where this information can be found/accessed). Including the use of company computers, internet, emails and phones			

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Periods of notice			
Provide information surrounding maternity/ paternity leave			
Discuss parental leave/ shared parental provisions			
Provide an outline of the dress code, parking and smoking			
Make sure documentation of employee's appointment for their file to be kept securely is signed off			
Ensure the employee has completed any health and safety or HR training			

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## First Month:

Task	Any other staff required	Date to be completed	Comments
Gain details of any employee representation, e.g. trade union membership			
Set up a meeting with the line manager to see how the employee is settling into their role. An informal meeting should see if they have any needs, concerns, training requirements and how they are adjusting to their role			
Is all workplace training completed that needs to be by this stage? Think about core Health & Safety and HR topics.			



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## After 3 Months:

Task	Any other staff required	Date to be completed	Comments
Have another meeting with the line manager to see how the employee is settling in and performing. Set timescales for achieving any developmental needs and adjusting work targets if needed			
Ensure all of the above have been completed			

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## After 6 Months:

Task	Any other staff required	Date to be completed	Comments
Discuss the employee's probation - are they staying?			
If they stay, the line manager should look at goals for the next 6 months, any training needed, any new objectives to set and any changes			
Ask the employee about how they found the induction process and whether they have any feedback on the process			

Date:	Signed (Manager):
	Signed (Employee):

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## How iHASCO can help you...

Our [Induction Training Package](#) provides organisations with a quick, straightforward way of inducting new staff. With our range of essential training courses and document and policy storage tool, inducting your new staff is simple! Included in this package are three of our 'essentials' eLearning courses, access to our document and policy storage tool and unrivalled support and service.

Our [Document & Policies Storage](#) feature allows you to make sure that new employees are familiar with your companies policies and procedures. This tool is the easiest way to share critical documents and policies with staff and track who has and hasn't read them. It's a highly affordable, easy-to-use tool that gets important messages through to your staff.

"Concise and easy to understand learning. Pass test Certificates available immediately. Administration easy to manage."



by Mark Rosoman

Rated 4.7 / 5 | 1,833 reviews



"High quality videos, up to date information and a sleek interface. Far superior to previous e-learning training programs I have used!"



by Mr Adam Lindsey

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