Induction checklist

The below checklist is part of the Welcome & Induction path on Develop. This checklist is for new starters, line managers and induction coordinators to work through together. The line manager has the end responsibility for ensuring all induction activities are carried out.

**How to use this checklist:** Please save/upload a copy to SharePoint and share with the relevant people (induction coordinator, line manager, new starter etc.)

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| Name: |  |
| Start date: |  |
| Line manager: |  |
| Induction Coordinator: (where applicable) |  |

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| Pre-start date | Notes *e.g. task assigned to, date completed etc.* |  |
| Tasks divided between line manager and induction coordinator – *And discuss the need for a mentor or buddy* |  |  |
| All relevant documents returned to HR *– signed contract, staff record form and additional documents requested in their offer letter* |  |  |
| To comply with the University’s sponsor licence, it is imperative that HR carry out the appropriate [right to work check](https://www.bristol.ac.uk/hr/resourcing/additionalguidance/overseas/right-to-work-checks/) prior to the first day of employment. A start date of employment should have been agreed in line with this compliance activity. Please check with your new starter that the right to work check has been carried out.  |  |  |
| Useful pre-start information sent to the new starter *e.g. pre-start meetings or events* |  |  |
| First day arrangements made and sent *e.g. when and where to meet, tasks and meetings with relevant colleagues* |  |  |
| First few days/weeks planned *e.g. meetings with relevant colleagues scheduled, tasks and induction activities* |  |  |
| Facilities in place *e.g. workspace, keys, IT software/hardware as necessary, equipment, phone, locker* |  |  |
| IT username and email address recorded from MyERP |  |  |
| Appropriate UCard access to relevant buildings organised  |  |  |
| Agree any workplace adjustments, signposting disabled colleagues to [Workplace Adjustment Plans](https://www.bristol.ac.uk/inclusion/disability/workplace-adjustments/workplace-adjustment-plans/) and financial support such as [Access to Work](https://www.bristol.ac.uk/inclusion/disability/financial-and-other-external-support/) funding. |  |  |
| Pre-start arrangements complete |  |  |

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| First week/s |
| HR, administration, and IT | Notes *e.g. task assigned to, date completed etc.* |  |
| Meet and greet on first day |  |  |
| [Collect UCard](http://www.bristol.ac.uk/cardservices/staff/) |  |  |
| Directed to the [New starter IT webpages,](http://www.bristol.ac.uk/it-services/new-staff/) including the [IT Induction Sway](https://sway.office.com/hdapG04hdEOz91Rz?ref=Link) and [request an MSTeams phone number](https://uob.sharepoint.com/sites/systemsupport/SitePages/Microsoft-Teams-with-Voice.aspx#new-starters) |  |  |
| Location and contact details of HR, finance and relevant IT team explained |  |  |
| Relevant shared resources and access explained e.g. Office 365 groups, local intranet sites. |  |  |
| Make staff aware of relevant policies, regulations and rules, including disciplinary rules, freedom of speech and requirements to declare outside work. |  |  |
| Review personal details in [MyERP](https://myerp.bris.ac.uk/agresso/) to ensure they are correct and either update them (where applicable) or contact the [Employee Services Hub](https://www.bristol.ac.uk/hr/contact/) with any queries.Guidance on how to do this is available on the [MyERP support site](https://uob.sharepoint.com/sites/myerp/SitePages/personal-details.aspx?xsdata=MDV8MDJ8fGYyMTVjOTc2M2M4ZTQxNWVkMTg1MDhkYzg2ZjQ2Y2FkfGIyZTQ3ZjMwY2Q3ZDRhNGVhNWRhYjE4Y2YxYTQxNTFifDB8MHw2Mzg1MzM2MzE1MzMyNDA3MDl8VW5rbm93bnxWR1ZoYlhOVFpXTjFjbWwwZVZObGNuWnBZMlY4ZXlKV0lqb2lNQzR3TGpBd01EQWlMQ0pRSWpvaVYybHVNeklpTENKQlRpSTZJazkwYUdWeUlpd2lWMVFpT2pFeGZRPT18MXxMMk5vWVhSekx6RTVPakpqTUdJNU5EZGhMVFpoWkdNdE5HSXhOaTA1TVRaaExUQmxZVFV6Tm1VMFpUUmtZbDltTWpCaE16UmlaQzA1WWpNMUxUUTFOekV0WWpKak15MHlabUV6T1dOak9ERTBPVFpBZFc1eExtZGliQzV6Y0dGalpYTXZiV1Z6YzJGblpYTXZNVGN4TnpjMk5qTTFNakl3T1E9PXxjMjNkZGUzNTQyMzQ0NWM2ZDE4NTA4ZGM4NmY0NmNhZHw2N2Q0YzY4MzljODA0OWI3YTgxMWQzNjA5NzdkZTZiYg%3D%3D&sdata=dHEzdk5rVWVNQ0NlVVpkdCs5VitZZVNEdytTZm5sS1VldjhVWEFBUm1zdz0%3D&ovuser=b2e47f30-cd7d-4a4e-a5da-b18cf1a4151b%2Cmlsja%40bristol.ac.uk).  |  |  |
| Building | Notes |  |
| Local first aid/emergency procedures explained *e.g. fire exits, whether a personal emergency evacuation plan (PEEP) is needed, first aid kits, defibrillator, who the local first aider/s are*Please see [PEEP guidance form](https://view.officeapps.live.com/op/view.aspx?src=http%3A%2F%2Fwww.bristol.ac.uk%2Fmedia-library%2Fsites%2Fsafety%2Fdocuments%2Fpeep-guidance-and-forms-gn%2520v9.docx&wdOrigin=BROWSELINK)  |  |  |
| Facilities of the building explained *e.g. kitchen, toilets (inc. gender neutral toilets), lockers, prayer rooms, breast feeding rooms, designated smoking areas* |  |  |
| Training | Notes |  |
| [Mandatory training](https://develop.bristol.ac.uk/ilp/pages/catalogsearch.jsf?catalogId=1700&menuId=1108&locale=en-GB&showbundlekeys=false&sidebarExpanded=true&q=%7B!q.op%3DAND%7D%20*:*&rows=6&fq=%7B!tag%3DclassificationIds_110587%7D%20classificationIds_110587:(1%2F110587%2F1274837%2F)) completed |  |  |
| [Essential and Recommended training](https://develop.bristol.ac.uk/ilp/pages/catalogsearch.jsf?catalogId=1700&menuId=1108&locale=en-GB&showbundlekeys=false&sidebarExpanded=true&q=%7B!q.op%3DAND%7D%20*:*&rows=11&fq=%7B!tag%3DclassificationIds_110587%7D%20classificationIds_110587:(1%2F110587%2F1687201%2F)) completed |  |  |
| Local/role-specific health and safety and risk assessments completed (if required) |  |  |
| Directed to the [People Development SharePoint](https://uob.sharepoint.com/sites/peopledevelopment) and to [Develop](https://develop.bristol.ac.uk/) |  |  |
| Other relevant training arranged/completed e.g. [line managers](https://uob.sharepoint.com/sites/peopledevelopment/SitePages/Managing-People-and-Teams.aspx?csf=1&web=1&e=4oaqT0/) completing the mandatory line manager training and teaching staff undertaking the [CREATE scheme](http://www.bristol.ac.uk/bilt/staff-development/) |  |  |
| Job Specifics | Notes  |  |
| Immediate workplan discussed |  |  |
| Hours of work and work patterns discussed |  |  |
| Annual leave and absence from work processes explained  |  |  |
| Job description understood |  |  |
| [Initial service review](http://www.bristol.ac.uk/hr/policies/ord26index/ord26app1/) process understood |  |  |
| Regular 1-1s set up and [Development Review](https://uob.sharepoint.com/sites/peopledevelopment/SitePages/Development-Review.aspx) process explained and understood |  |  |
| Research/externally funded staff: funding conditions understood and directed to; [*School research staff reps*](https://uob.sharepoint.com/sites/peopledevelopment/SitePages/research.aspx#championing-researcher-careers)*,* [*development support available*](https://uob.sharepoint.com/sites/peopledevelopment/SitePages/research.aspx)*, and the* [*Research Data Service*](http://www.bristol.ac.uk/staff/researchers/data/) |  |  |
| Workplace adjustments in place. |  |  |
| First few days induction completed |  |  |

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| First Month | Notes *e.g. task assigned to, date completed etc* |  |
| Regular 1:1 meetings set-up  |  |  |
| Training needs reviewed |  |  |
| Longer term objectives (linked to Staff Review) and work plans agreed |  |  |
| Workplace adjustments reviewed for effectiveness. |  |  |
| Induction completed & ticked off on ERP (by the line manager) |  |  |

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| Notes section*A place for line managers, new starters, and induction coordinators to add notes to (if helpful) throughout the induction process.* |
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