



New Employee Induction Checklist

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Registered charity no. 226171

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|----------------------|------------|--------------------|------------|
| Name of Employee: | | | |
| Job title: | | | |
| Employee Start date: | DD/MM/YYYY | Date of Induction: | DD/MM/YYYY |
| Welcomed By: | | | |
| Inductee Signature: | | | |

| Introduction to the organisation | Completed ✓ |
|--|--------------------------|
| Show new employee where they will be working. Work Area/Desk/Locker/Office etc | <input type="checkbox"/> |
| Introduce them to their line manager, colleagues, senior managers, including their 'buddy' and their Mentor | <input type="checkbox"/> |
| Show new employee building layout/facilities including access/egress, fire assembly points, evacuation, fire toilets, rest areas etc | <input type="checkbox"/> |
| Deal with any key matters such as their P45, National Insurance number and security ID | <input type="checkbox"/> |
| Outline key health & safety requirements, safe systems of work, first aid, manual handling etc. Detailing H&S training in the organisation | <input type="checkbox"/> |
| Who's who (People), our Purpose (Mission), What we do, How, we do it and our outcomes | <input type="checkbox"/> |
| Organisation future plans (Vision) and developments | <input type="checkbox"/> |
| Brief history of organisation | <input type="checkbox"/> |

| New Employee's Job | Completed ✓ |
|---|--|
| Explain new job role fully, how it fits in the organisation & work practices | <input type="checkbox"/> |
| Outline expected performance and how it will be assessed | <input type="checkbox"/> |
| Job specific training and development that will be given | <input type="checkbox"/> |
| Possible opportunities for future development and career progression | <input type="checkbox"/> |
| New employee's terms and conditions of employment (using Job Description) Run through... | |
| T&Cs to ensure they are understood and give them a copy of the Job Description | <input type="checkbox"/> |
| Details of any probationary/trial period | <input type="checkbox"/> |
| Work hours, breaks, holidays and when they will get paid | <input type="checkbox"/> |
| Pension information | <input type="checkbox"/> |
| The organisation's important rules on: <ul style="list-style-type: none"> > job performance > discipline > absence, including because of illness and sick pay > complaints against staff, such as bullying and harassment > where more details can be found | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| Other important rules such as use of the company internet, email and phones etc | <input type="checkbox"/> |
| Periods of notice to be given | <input type="checkbox"/> |
| Maternity/paternity/ parental leave/shared parental provisions | <input type="checkbox"/> |

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| Details such as dress code, parking, no smoking policy, and rest room, kitchen, refreshment/restaurant/canteen facilities | <input type="checkbox"/> |
| Complete documentation on new employee's appointment for their personnel file to be kept securely | <input type="checkbox"/> |
| Our commitment to being an equal opportunities employer | <input type="checkbox"/> |
| Details of any employee representation, including any trade union membership | <input type="checkbox"/> |

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| Induction Given By: | |
| Inductee Signature: | |

REVIEWS Completed ✓

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| At Four/Six Weeks | Date: DD/MM/YYYY |
| Line Manager or Mentor to hold an informal meeting with new employee to assess how they are adjusting to their role and whether they have any training needs or other concerns | <input type="checkbox"/> |

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| Given By: | |
| Inductee Signature: | |

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| At Three Months | Date: DD/MM/YYYY |
| <p>Line Manager or Mentor to review with the new employee, how they are settling in and performing</p> <p>This is also an opportunity to pinpoint any training/ development needs, set timescales for achieving them and adjust work targets if required</p> | <input type="checkbox"/> |

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| Inductee Signature: | |

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| At Six Months | Date: DD/MM/YYYY |
| <p>If the new employee is on trial/probation, then it's decision time - will they stay or go?</p> <p>If they're staying, it's time for the line manager to look to the next six months, to consider setting any new/revised work objectives, training or development needs for the individual.</p> | <input type="checkbox"/> |

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| Given By: | |
| Inductee Signature: | |

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| At 12 Months | Date: DD/MM/YYYY |
| <p>Ask the employee for give feedback on how useful and relevant they found their induction.</p> <p>What worked well?</p> <p>What could be improved?</p> | <input type="checkbox"/> |

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| Given By: | |
| Inductee Signature: | |

NOTES

Resources and Signposting

Most people will deal with personal issues/crisis at some point in their life. Being aware that an employee is handling a personal issue means that you may be able to signpost/direct them to the correct help and support, during a challenging time.

The following is a list of non-work-related issues, which can adversely impact on an employee's performance at work. If we 'signpost' employees facing challenges to good sources of advice, information, and guidance, this can help them to better manage these issues, get their lives back on track and more effectively re-integrate into a new work role/job, their family life, their local community and wider society too.

| Areas/Issues to be aware of are: | | ✓ |
|----------------------------------|---|--------------------------|
| 1. | Interview/CV preparation (pre-employment) | <input type="checkbox"/> |
| 2. | Creating a Professional Email (pre-employment) | <input type="checkbox"/> |
| 3. | Obtaining ID (pre-employment) | <input type="checkbox"/> |
| 4. | Opening a Bank Account (pre-employment) | <input type="checkbox"/> |
| 5. | Signing up to GP/Dentist/Optician (pre-employment) | <input type="checkbox"/> |
| 6. | DBS Checks (only if applicable for the job/contract) | <input type="checkbox"/> |
| 7. | Accommodation/Housing | <input type="checkbox"/> |
| 8. | In-work Benefits | <input type="checkbox"/> |
| 9. | Travel arrangements | <input type="checkbox"/> |
| 10. | Obtaining a Driving Licence | <input type="checkbox"/> |
| 11. | Childcare considerations/arrangements (if applicable) | <input type="checkbox"/> |
| 12. | Induction (Local and Organisational) | <input type="checkbox"/> |

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| 13. | Having a Mentor | <input type="checkbox"/> |
| 14. | Support for workers with disabilities | <input type="checkbox"/> |
| 15. | Mental Health Support | <input type="checkbox"/> |
| 16. | Substance Misuse Support - Alcohol/Drugs | <input type="checkbox"/> |
| 17. | Gambling Support | <input type="checkbox"/> |
| 18. | Managing Personal Finances | <input type="checkbox"/> |
| 19. | Debt/Tax Advice | <input type="checkbox"/> |
| 20. | Health - Fitness and Exercise | <input type="checkbox"/> |
| 21. | Healthy Eating | <input type="checkbox"/> |
| 22. | Complying with Licence Conditions/Outstanding Fines (if applicable) | <input type="checkbox"/> |
| 23. | Insurances - Car, Home etc | <input type="checkbox"/> |
| 24. | Re-building Family Relationships | <input type="checkbox"/> |
| 25. | Support Hubs - on-going support | <input type="checkbox"/> |
| 26. | Jobs Skills/Vocational Training | <input type="checkbox"/> |
| 27. | IT/Web/Social Media Literacy and Safeguarding Awareness Training | <input type="checkbox"/> |

NOTES

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