**Induction Checklist for New Employees and Managers**

The purpose of this checklist is to guide both the employee and manager through key induction activities to be covered from day one through to the end of probation. For further guidance on the preboarding and onboarding tasks allocated to new staff and managers via People and Money please review the [Guide to Recruitment and Onboarding.](https://www.ed.ac.uk/staff/services-support/hr-and-finance/people-and-money-system/people-and-money-user-guides)

For managers, please use this checklist for all new employees including new starts, transfers, additional posts and rehires. It can be adapted to suit local arrangements and requirements.

For pre joining arrangements managers should follow the [pre-employment checklist](https://www.ed.ac.uk/human-resources/learning-development/on-boarding/guidance-managers).

**First Day**

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| **Topic** | **Useful Links** | **Completed** |
| Introduction to the role, department and University | [www.ed.ac.uk/about](http://www.ed.ac.uk/about) |  |
| Introduction to Line Manager/Supervisor/Buddy and relevant staff who they will be working closely with |  |  |
| Check if any reasonable adjustments are required | <https://equality-diversity.ed.ac.uk/disabled-staff-support> |  |
| Building access (building tours can be arranged) – keys and security arrangements e.g. access codes if working out-of-hours. Reporting of building faults. UoE campus maps | [www.ed.ac.uk/maps/download](http://www.ed.ac.uk/maps/download) |  |
| Location of building facilities; toilets/showers, lockers and bike storage, kitchen and breakout space, mailroom, printers, stationary, meeting rooms and exits. |  |  |
| Emergency evacuation procedures. Complete a ‘personal employee evacuation plan’ (PEEP) if required |  |  |
| Show working area; desk, chair, telephone, PC (everything should be ready for first day). |  |  |
| Local H&S arrangements (local health and safety contacts, local fire stewards and first aiders etc. should all be communicated to new employee) | <https://health-safety.ed.ac.uk/> |  |
| Fire alarm system and testing schedule |  |  |
| First aid and accident reporting |  |  |
| No smoking policy | <https://edin.ac/3URqjv7> |  |
| Travel arrangements - work, commuting, personal, parking | <https://transport.ed.ac.uk/parking> |  |
| Dress code |  |  |
| Employee has uploaded their signed contract, provided their bank details and P45/New start checklist and has completed all relevant preboarding and onboarding tasks within People and Money. | <https://www.ed.ac.uk/staff/services-support/hr-and-finance/people-and-money-system/people-and-money-user-guides> (see 'Onboarding' under heading of 'Recruitment and Onboarding') |  |

**By the end of Week 1**

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| **Topic** | **Useful Links** | **Completed** |
| Details of role and key responsibilities; provide handover notes for role if applicable. |  |  |
| Information on social gatherings; team outings and recreational activities. Office/department social groups/clubs (if applicable) |  |  |
| Employee has provided emergency contact details on People and Money. | <https://www.ed.ac.uk/staff/services-support/hr-and-finance/people-and-money-system/people-and-money-user-guides> (see section 'Personal Data Maintenance') |  |
| Employee has received staff card, login details and staff email account set up and ask for any questions. | [www.ed.ac.uk/information-services/help-consultancy/card](http://www.ed.ac.uk/information-services/help-consultancy/card) |  |
| Working hours and pattern; shifts, timesheets, out-of-hours work (if applicable) and breaks. |  |  |
| Guidance on record management including telephones and computing regulations; freedom of information and data protection. | [www.ed.ac.uk/records-management/roles-responsibilities/all](http://www.ed.ac.uk/records-management/roles-responsibilities/all) |  |
| Mail arrangements and stationery supplies – Procurement policy / Fairtrade (incl catering/printing) |  |  |
| Social Responsibility and Sustainability guidance. | [www.ed.ac.uk/about/sustainability](http://www.ed.ac.uk/about/sustainability) |  |
| Understand your responsibilities for information security. | <https://infosec.ed.ac.uk/information-protection-policies/information-security-standards-role-responsibilities> |  |
| Schedule and format of any team and service wide meetings. |  |  |
| Any other local systems and policies. |  |  |
| Absence and sickness monitoring processes. Arrangements for appointments during working hours. | [Absence Management Policy](https://human-resources.ed.ac.uk/policies-guidance/a-to-z-of-policies-and-guidance) |  |
| Annual leave entitlement and booking leave arrangements, dates of public holidays and Christmas closure (if applicable). | <https://human-resources.ed.ac.uk/policies-guidance/conditions-service> |  |
| Time and method of pay (including payments during period of absence due to illness, injury or loss). | <https://uoe-finance.ed.ac.uk/about/sections/payroll> |  |
| Procedures for claiming expenses (if applicable). | <https://uoe-finance.ed.ac.uk/for-staff/financial-regulations-policies-and-procedures/expenses-policy> |  |
| Information on Pensions | <https://uoe-finance.ed.ac.uk/pensions> |  |
| Information on Health & Wellbeing | [www.ed.ac.uk/staff/health-wellbeing](http://www.ed.ac.uk/staff/health-wellbeing) |  |
| Occupational Health Service | <https://health-safety.ed.ac.uk/occupational-health> |  |
| If applicable, check any reasonable adjustments have been put in place |  |  |

**Required Training**

There are a number of online courses which should be completed by the new employee, please see below as a guide:

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| **Topic** | **Useful Links** | **Completed** |
| Anti-Bribery | <https://human-resources.ed.ac.uk/learning-development/courses/other-courses/elearning/anti-bribery> |  |
| Anti-Money Laundering | <https://edin.ac/4izpTSQ> |  |
| Fraud Awareness | <https://edin.ac/41V6WEI> |  |
| Expenses Fundamentals | <https://edin.ac/3Dl3UjV> |  |
| Procurement Fundamentals | <https://edin.ac/3DlL1xf> |  |
| Understanding Unconscious Bias  (All staff are **required** to complete this course at least every 3 years) | <https://edin.ac/4dYwbcf> |  |
| Data Protection | <https://data-protection.ed.ac.uk/training-events> |  |
| Inclusion Essentials at Edinburgh  (All staff are **required** to complete this course at least every 3 years) | <https://edin.ac/4dUoOCz> |  |
| Health and Safety (various courses to choose from depending on role) | <https://health-safety.ed.ac.uk/training/training-required> |  |
| Information Security Essentials | <https://infosec.ed.ac.uk/training> |  |
| Introduction to Sustainability | <https://www.ed.ac.uk/sustainability/programmes-and-projects/sustainability-innovation-leadership/sustainable-leadership/professional-development/introduction-to-sustainability> |  |
| Getting Recruitment Right (for staff involved in recruitment panels) | <https://edin.ac/3NCpguD> |  |
| Preventing Sexual Harassment | <https://edin.ac/3NAzAmM> |  |
| Responding to Disclosures of Sexual Violence | [www.ed.ac.uk/staff/student-support/sexual-violence/training-resources](http://www.ed.ac.uk/staff/student-support/sexual-violence/training-resources) |  |

All new academic staff are expected and encouraged to participate in continuing professional development in teaching and support for learning.

[CPD Framework for Learning and Teaching](https://www.ed.ac.uk/institute-academic-development/learning-teaching/cpd/cpd)

There is a centralised space for Learning within People and Money where you can search for and undertake learning as well as maintain records of personal/professional skills and qualifications. Please see further information in the [Guide to Learning, Skills and Qualifications for Employees and Learners.](https://www.ed.ac.uk/staff/services-support/hr-and-finance/people-and-money-system/people-and-money-user-guides)

**Ongoing Induction Support and beyond**

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| **Topic** | **Useful Links** | **Completed** |
| Have objectives been set, and are the manager’s expectations clear to the employee? |  |  |
| Plan for regular one-to-one meetings to discuss progress and for any adjustments to be made |  |  |
| Best method of communication with line manager (face-to-face, email or phone call) |  |  |
| Annual review process | https://human-resources.ed.ac.uk/learning-development/annual-review |  |
| HR support | https://human-resources.ed.ac.uk/ |  |
| Trade Union support | https://human-resources.ed.ac.uk/policies-guidance/tradeunionsinfo |  |
| Professional registration arrangements (if applicable) |  |  |
| Career development | https://www.ed.ac.uk/staff/career-development |  |