

# **Model Induction Process**

Approved by CMT 29 March 2000

Last revised January 2024

# EMPLOYEE INDUCTION

## INTRODUCTION

Induction is the first step in building a two-way relationship between the council and a new employee. It is the process by which a new employee learns about the council, and becomes part of it. A good induction programme gives the necessary information, resources and motivation to assist a new employee adjust quickly to their work environment. It also shows our commitment to the employee.

Beyond the training in skills and tasks required for their specific jobs, new employees need to be informed about our policies and practices. They should also be advised of the standards we expect of them and what they can expect from us.

Induction takes place at both Corporate and Service level and applies equally to new employees and to those changing jobs within the council. It is important that new employees receive both a Corporate and a Service Induction. Employees changing jobs between services may only require a Service Induction.

Induction is designed to give employees a clear understanding of:

- the council's organisational structure, the services it provides and the customers it serves;
- any legal requirements (e.g. Health & Safety, Equality etc.) and where to find information on policies, procedures and working practices;
- the training and development they can expect to do their job;
- the part they will be expected to play towards the goals and objectives their team/service, and those of the council;
- the employee appraisal and development processes.

A guide to the content and format of an Induction programme is shown in the Manager's Model Induction Checklist attached as Appendix 1. This content covers the required and important aspects of induction however services may want to add more specific content to reflect the service and the role.

A guide for new managers has also been developed, titled 'Online Managers Induction Tool'. This covers the key issues of management – Managing Performance, Managing Money, and Developing Capacity. The guide references core and optional training courses to support new managers be effective in the role.

## RESPONSIBILITIES

### Deputy Chief Executors and Heads of Service

Directors and Heads of Service are responsible for ensuring that Induction is delivered for all new\* employees in their service (\* to the council or an existing employee who has transferred to the service on a temporary or permanent basis).

### Line Managers

Line Managers are responsible for:

- preparing and carrying out a suitable Service Induction within the specified timescales. The Induction process should normally be completed within 3 months of the employee starting work;
- providing new employees with an 'Employee Model Induction Record' to note their progress through the process (see Appendix 2);
- jointly reviewing Induction Programmes with new employees and making improvements to the programme as appropriate;

- ensuring that new employees complete the required mandatory e-learning modules on the [Mylearning platform](#).

## **Employees**

Employees are responsible for:

- ensuring they have completed the mandatory e-learning modules within the stipulated timescales.
- taking part in the Learning process;
- reading and ensuring they have understood the main employment policies identified in the Induction process;
- recording their progress through the Induction process on an 'Employee Model Induction Record' (see Appendix 2);
- taking part in evaluating the Induction process

## **PRE-EMPLOYMENT**

Following confirmation of start date from the line manager, the HR Support Team will issue a Statement of Particulars to the new employee. This confirms their appointment to the post, their start date and to where/who they should report.

Where, on their first day, a new employee is to report to a third party (i.e. a receptionist), managers should give the third party advance notice of when to expect the employee.

When employing someone with a disability, the line manager must discuss and agree any special needs with the employee prior to them taking up post. As far as is practical, the manager must have any reasonable adjustments or necessary aids in place before the employee starts.

### **Display Screen Equipment (PCs/Laptops)**

Where an employee needs a PC and workstation, the line manager should make sure that the equipment, together with a login ID, and access to e-mail (and Internet if required) are available on the first day of employment. All IT requests should be logged on the [IT Portal](#)

Managers should also make sure that the employee's name is entered into the Display Screen Equipment (DSE) risk assessment and that the employee is given access to the on-line training tool. Contact your Occupational Health and Safety Adviser to make arrangements.

For further information see Manager's Model Induction Checklist attached as Appendix 1.

### **Supporting Flexible Working Policy**

Managers need to clarify how the Policy applies to the new employee and prepare the necessary administration. For example, is the post designated for hybrid working? If the employee will be clocking in and out they should be set up from the first day of employment.

Where a new employee requires any access cards, fob/key entry code etc., managers should also have this for the employee on their first day.

**ID Badges** - Managers should make an appointment for employees to have their photograph taken when they take up post (e-mail [idbadges@westlothian.gov.uk](mailto:idbadges@westlothian.gov.uk)).

## SERVICE INDUCTION

Service level induction focuses on:

- employees' working arrangements;
- introducing employees to immediate team and fellow work colleagues;
- individual and team objectives;
- the employee appraisal and development process; and
- making employees aware of specific employment policies/workplace risk assessments, rules, procedures and any health and safety responsibilities they will be responsible for that are detailed in the service OHS Supplementary Policy or Safety Arrangements Booklet.

### PREPARATION OF INDUCTION PROGRAMME

Before a new employee starts work, the Line Manager should prepare an Induction Programme. This should be tailored to the nature and seniority of the post, and to suit the needs of the particular individual. For example:

- school leavers/skill seekers
- graduates
- long-term unemployed
- people with disabilities
- people who are new to this country
- experienced individuals changing jobs either within or from out with the council

Induction Programmes must include health and safety instruction such as the safe use of equipment, risk assessment, First Aid, Emergency Procedures, health and safety responsibilities and safe working practices. The Occupational Health & Safety Unit can provide further information. Moreover, our policies are inclusive of all protected characteristics.

Where employees work across different sites, the Induction programme must cover all site-specific procedures.

Managers should make sure that Induction Programmes do not overload new employees with too much information during the first few days or weeks.

A guide to the content and format of a typical induction programme is given in the Managers' Model Induction Checklist attached as Appendix 1. The content will require to be tailored to meet individual Service needs.

Service Inductions must be completed and signed off within three months of the employee's start date. Employee Model Induction Record attached as Appendix 2.

Managers should assess their Service Induction programme and make changes as necessary.

## APPENDIX 1: MANAGER'S MODEL INDUCTION CHECKLIST

This is a guide to the type of information that Services might wish to include in the Induction Checklist, and the stages at which it would be appropriate to introduce that information.

The content will require to be tailored to meet individual Service needs.

**Managers should ensure that the Induction Programme for new employees does not overload them with too much information during the first few days or weeks**

Employee's Name:	
Post Title:	
Start Date:	

### Line Manager's Responsibilities

✓ as completed

<b>Pre-employment Stage</b>	
<b>Flexi card/Clock in/out card or fob/key</b> ordered for employee's first working day <i>(where appropriate)</i>	
<b>ID Badge</b> - arrange appointment for photograph, email: <a href="mailto:idbadges@westlothian.gov.uk">idbadges@westlothian.gov.uk</a>	
<b>Receptionist/third party</b> advised when to expect new start	
<b>Disabled employee</b> - reasonable physical adjustments/aids in place <i>(where needed)</i>	
<b>Equipment</b> - ensure employee is provided with the necessary 'tools for the job' e.g.: <ul style="list-style-type: none"> <li>• a PC/ laptop and suitable workstation or to arrange a PC login or to allow access to Internet/E-mail (if appropriate) go to <a href="http://Supportworks Self Service Portal (westlothian.gov.uk)">Supportworks Self Service Portal (westlothian.gov.uk)</a></li> <li>• mobile phone <i>(where appropriate)</i></li> <li>• <i>Lone working device (is their posts designated for issue?)</i></li> </ul>	
<b>Prepare an Induction programme</b> - tailor to the nature and seniority of the post, and to suit the needs of the particular individual. Where employee works across different sites, the programme must cover all site-specific procedures.  If this is a managerial role refer to the <a href="#">Online Managers Induction Tool</a> . This covers the key issues of management – managing performance, managing money and developing capacity. The guide references core and optional training courses to support new managers be effective in the role.	

<b>DAY 1</b>	
Welcome and introductions to immediate work colleagues/team <ul style="list-style-type: none"> <li>• Discuss any rotas, working hours/patterns, lunch/comfort breaks, holiday requests etc.</li> <li>• Explain how to operate PC/ laptop, access intranet/internet (if applicable)</li> </ul>	
Tour of workplace & facilities (e.g. location of toilets/refreshments/kitchen facilities)	
Give employee an 'Employee Induction Record' (see Appendix 2). Discuss timetable of planned activities. Employee to record each element of Induction Programme as completed.	

General Health and Safety matters (i.e. location of fire exits / evacuation procedures)	
Introduce new member of staff to buddy, mentor or coach (if applicable)	
Issue Flexi / Clock Card or Fob/Key ( <i>where appropriate</i> ) <ul style="list-style-type: none"> <li>Explain how to use TMS (if applicable)</li> </ul>	
<b>Mandatory E-Learning to be completed by the end of the first day:</b> Please arrange access to the <a href="#">MyLearning platform</a> to allow new staff to complete the required 3 modules:	

Arrange for employee to be added to WLC phonebook (where appropriate)	
Advise employee of telephone procedures	
<b>Requirements for Pool Car Users &amp; Green Travel Strategy</b> Employees to produce their driving licence and Comprehensive motor insurance Policy <u>and</u> Certificate for manager to verify and copy to personal file (if required). (see Travel & Subsistence Policy in Mytoolkit under Policies, Procedures and Guidance: <a href="https://www.westlothian.gov.uk/article/33242/Travel-and-Subsistence">https://www.westlothian.gov.uk/article/33242/Travel-and-Subsistence</a>  Please refer to the Green Travel Strategy to access the Employee Guide – Booking a pool car: <a href="http://webwest1.app.westlothian.gov.uk/carpool/default.html">http://webwest1.app.westlothian.gov.uk/carpool/default.html</a>	

<b>By End of Week 1</b>	
<b>Information specific to own Service area</b>	
<ul style="list-style-type: none"> <li>Introduction to other key workers or extended team</li> </ul>	
<ul style="list-style-type: none"> <li>Agree an individual Work plan and introduce the council's appraisal/ 121 arrangements. More information on <a href="#">Mytoolkit</a></li> </ul>	
<ul style="list-style-type: none"> <li>Discuss any immediate training/development needs</li> </ul>	
<ul style="list-style-type: none"> <li>Outline of individual / team responsibilities</li> </ul>	
<ul style="list-style-type: none"> <li>Understanding of Service plan / structure</li> </ul>	
<ul style="list-style-type: none"> <li>Arrange any other site visits or meetings with key stakeholders</li> </ul>	
<ul style="list-style-type: none"> <li>First Aid facilities</li> </ul>	
<ul style="list-style-type: none"> <li>Relevant risk Assessments and safe systems of work</li> </ul>	
<ul style="list-style-type: none"> <li>Lone working device issued and training given (if applicable)</li> </ul>	
<b>Mandatory Induction E-Learning to be completed by the end of the first week:</b> Please ensure that the required modules are completed on the MyLearning platform:	
<b>Administrative / Security Arrangements</b>	

<ul style="list-style-type: none"> <li>ID Badge issued</li> </ul>	
<ul style="list-style-type: none"> <li>Explain how to book annual leave/time off (where appropriate)</li> </ul>	
<ul style="list-style-type: none"> <li>Mobile telephone (where appropriate)</li> </ul>	
<ul style="list-style-type: none"> <li>Sickness Absence reporting process explained</li> </ul>	
<ul style="list-style-type: none"> <li>E-mail and core IT systems explained (<i>where appropriate</i>)</li> </ul>	
<ul style="list-style-type: none"> <li>Explain how to use the online <a href="#">room and car booking system</a></li> </ul>	

**Pension Information** (see Lothian Pension Fund on <http://www.lpf.org.uk>)

- Mention opportunity to opt out of the Pension Fund
- 

**By End of Week 2**

**COUNCIL POLICIES AND PROCEDURES**

It is important that employees understand what is expected of them whilst in the Councils employment. Employees should read and check their understanding of the documents below. These can be provided in other formats if required by contacting HR Services. Links to the relevant documents are provided below.

Topic	Date completed
<a href="#">Bullying and Harassment</a>	
<a href="#">Code of Conduct for Employees</a>	
<a href="#">Disciplinary Code</a>	
<a href="#">Equality and Diversity</a>	
<a href="#">Health and Safety Policy</a>	
<a href="#">Internet, Email and Social Media Policy</a>	
<a href="#">Misuse of Alcohol, Drugs and other Substances</a>	
<a href="#">Personal Safety at Work Guidance</a>	
<a href="#">Smoke Free Policy</a>	
<a href="#">Supporting Attendance at Work Policy</a>	

**Informal Meeting to Review Induction**

- Review of first 2 weeks

**By End of First 3 Months**

**Final Induction Review Meeting**

- Jointly review Induction Programme in full with employee and implement any appropriate and agreed suggestions for change

## Appendix 2: Employee Model Induction Record

Employee's Name	
Post Title	
Service	
Service Unit/Workplace	
Start Date	

		Completion Date
<b>Day 1</b>	<b>Welcome and Introductions</b> to immediate work colleagues/team (i.e. get personally introduced to new colleagues)	
	Received a copy of ' <b>Employee Induction Record</b> ' to retain and record as each element of the Induction Programme is completed.	
	<b>Tour of Workplace/Facilities</b> <ul style="list-style-type: none"> <li>• Location of toilets</li> <li>• Kitchen facilities/refreshments</li> <li>• Smoking information</li> <li>• Working patterns, lunch breaks, use of any rotas explained</li> <li>• Introduce to buddy/mentor (if any)</li> <li>• Including tour of building/depot</li> <li>• Explain how to use PC (if required), phones, how to access intranet</li> </ul>	
	<b>Administration/Security</b> <ul style="list-style-type: none"> <li>• Have photograph taken for ID Badge</li> <li>• Received Flexi card / fob or key issued <i>(if applicable)</i></li> <li>• Explain how to use Mitrefinch TMS (if applicable)</li> <li>• Received copy of the 'Flexible Working Hours Scheme' <i>(if applicable)</i></li> <li>• Received mobile telephone <i>(if applicable)</i></li> </ul>	
	<b>General Health &amp; Safety</b> <ul style="list-style-type: none"> <li>• Location of fire exits and evacuation procedures</li> <li>• First Aid facilities</li> </ul>	
	<b>Requirements Pool Car Users &amp; Green Travel Strategy</b> If required, produce your driving licence and Comprehensive motor insurance Policy <u>and</u> Certificate for manager to verify and copy to personal file (see Travel & Subsistence Policy on Mytoolkit under Policies, Procedures and Guidance).	



	<p><a href="https://www.westlothian.gov.uk/article/33242/Travel-and-Subsistence">https://www.westlothian.gov.uk/article/33242/Travel-and-Subsistence</a></p> <p>Please refer to the Green Travel Strategy to access the Employee Guide – Booking a pool car:  <a href="http://webwest1.app.westlothian.gov.uk/carpool/default.html">http://webwest1.app.westlothian.gov.uk/carpool/default.html</a></p>	
	<p><b>Mandatory E-Learning to be completed by the end of the first day:</b> please complete the required 4 modules on the MyLearning platform: <a href="https://mylearning.westlothian.gov.uk">https://mylearning.westlothian.gov.uk</a></p>	
<b>By End of Week 1</b>	<p><b>Information Specific to Service Area</b></p> <ul style="list-style-type: none"> <li>• Introductions to other key staff/customers</li> <li>• Outline of individual/team responsibilities</li> <li>• Service Plan/Structure</li> <li>• Arrange attendance at relevant meetings, project groups etc.</li> <li>• Arrange any relevant customer/site visits</li> <li>• Explain how to use the online room booking system:  <a href="https://intranet.westlothian.gov.uk/roomandpoolcars">https://intranet.westlothian.gov.uk/roomandpoolcars</a></li> </ul>	
	<p><b>Mandatory Induction E-Learning to be completed by the end of the first week:</b></p> <p>please ensure that the required modules are completed on the MyLearning platform: <a href="https://mylearning.westlothian.gov.uk">https://mylearning.westlothian.gov.uk</a></p>	
	<p><b>Administration/Security</b></p> <ul style="list-style-type: none"> <li>• ID card issued</li> <li>• Sickness Absence reporting process explained</li> <li>• E-mail and core IT systems explained (<i>where appropriate</i>)</li> <li>• Explain how to book annual leave/time off etc.</li> <li>• Advised of First Aid procedures</li> </ul>	
	<p><b>Pension Information</b> received and explained the opting out of the Pension Fund option (see also <a href="http://www.lpf.org.uk">www.lpf.org.uk</a>)</p>	
	<p><b>Discuss Work plan &amp; ADR Process</b></p> <ul style="list-style-type: none"> <li>• Agree an individual Work plan and introduce the council's appraisal and 1 to1 arrangements</li> <li>• Discuss/ identify any immediate training/development needs</li> </ul>	
<b>By End of Week 2</b>	<p><b>COUNCIL POLICIES AND PROCEDURES</b></p> <p>It is important that employees understand what is expected of them whilst in the Councils employment. Employees should read and check their understanding of the documents below. These can be provided in other formats if required by contacting HR Services. Links to the relevant documents are provided below.</p>	

Topic	Date completed
<a href="#">Bullying and Harassment</a>	
<a href="#">Code of Conduct for Employees</a>	
<a href="#">Disciplinary Code</a>	
<a href="#">Equality and Diversity</a>	
<a href="#">Health and Safety Policy</a>	
<a href="#">Internet, Email and Social Media Policy</a>	
<a href="#">Misuse of Alcohol, Drugs and other Substances</a>	
<a href="#">Personal Safety at Work Guidance</a>	
<a href="#">Smoke Free Policy</a>	
<a href="#">Supporting Attendance at Work Policy</a>	

This record should be kept in an employee's file in Objective under Training.

I confirm that I have read the above documents.

Employee Name:	
Employee Signature:	

Manager Name (Printed)	Managers Name (Signature)	Date

#### Informal Meeting to Review Induction

Review of first 2 weeks

#### By End of 3 Months Final Induction Review Meeting

Jointly review Induction Programme in full with Manager and make suggestions for change where appropriate

#### Completion of Induction Programme (sign and date)

Employee:	Date:
Manager:	Date: