# 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

|  |  |
| --- | --- |
| **Pre-employment Stage** | |
| **Flexi card/Clock in/out card or fob/key** ordered for employee’s first working day *(where appropriate)* |  |
| **ID Badge** - arrange appointment for photograph, email: [idbadges@westlothian.gov.uk](mailto:idbadges@westlothian.gov.uk) |  |
| **Receptionist/third party** advised when to expect new start |  |
| **Disabled employee** - reasonable physical adjustments/aids in place *(where needed)* |  |
| **Equipment** - ensure employee is provided with the necessary ‘tools for the job’ e.g.: |  |
| * a PC/ laptop and suitable workstation or to arrange a PC login or to allow access to Internet/E-mail (if appropriate) go to [Supportworks Self Service Portal (westlothian.gov.uk)](https://it.westlothian.gov.uk/#/loginmanual) * mobile phone *(where appropriate)* * *Lone working device (is their posts designated for issue?)* |
| |  |  | | --- | --- | | **DAY 1** | | | Welcome and introductions to immediate work colleagues/team   * Discuss any rotas, working hours/patterns, lunch/comfort breaks, holiday requests etc. * Explain how to operate PC/ laptop, access intranet/internet (if applicable) |  | | 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 *-* Explain how to use TMS (if applicable) |  | | **Mandatory E-Learning to be completed by the end of the first day**:  Please arrange access to the [MyLearning platform](https://mylearning.westlothian.gov.uk/login/index.php) to allow new staff to complete the 3 Mandatory modules:   * User Security Awareness * Data Protection * Records Management |  |   **Prepare an Induction programme -** 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 [Online Managers Induction Tool](https://intranet.westlothian.gov.uk/media/59327/Managers-Online-Induction-Tool/pdf/2023-11-30_OnlineManagersInductionTool.pdf?m=1701361537937). 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. |  |

|  |  |
| --- | --- |
| Arrange for employee to be added to WLC phonebook (where appropriate) |  |
| Advise employee of telephone procedures |  |
| **Requirements Pool Car Users & Green Travel Strategy**  If required, produce your driving licence and Comprehensive motor insurance Policy and Certificate for manager to verify and copy to personal file (see [Travel & Subsistence Policy](https://intranet.westlothian.gov.uk/article/33242/Travel-and-Subsistence) on Mytoolkit under Policies, Procedures and Guidance).  Please read the [Green Transport Strategy](https://intranet.westlothian.gov.uk/article/73315/Green-Transport) |  |

|  |  |  |
| --- | --- | --- |
|  | **By End of Week 1** | |
| **Information specific to own Service area** | | |
| * Introduction to other key workers or extended team | |  |
| * Agree an individual Work plan and introduce the council’s appraisal/ 121 arrangements. More information on [Mytoolkit](https://mylearning.westlothian.gov.uk/) * Discuss any immediate training/development needs | |  |
| * Outline of individual / team responsibilities | |  |
| * Understanding of Service plan / structure | |  |
| * Arrange any other site visits or meetings with key stakeholders | |  |
| * First Aid facilities | |  |
| * Relevant risk Assessments and safe systems of work | |  |
| * Lone working device issued and training given (if applicable) | |  |
| **Mandatory Induction E-Learning to be completed by the end of the first week**:  Please ensure that the employee completes the 6 mandatory modules below on the MyLearning platform:   * Working for West Lothian Council * Health and Safety * Fire Safety * Customer Service * Equality and Diversity * Public Body Climate Change | |  |
| **Administrative / Security Arrangements** | | |
| * ID Badge issued | |  |
| * Explain how to book annual leave/time off (where appropriate) | |  |
| * Mobile telephone (where appropriate) | |  |
| * Sickness Absence reporting process explained * E-mail and core IT systems explained *(where appropriate)* | |  |
| * Explain how to use the online [room and car booking system](https://intranet.westlothian.gov.uk/article/72235/Room-and-Pool-Car-Bookings) | |  |
| **Pension Information** (see Lothian Pension Fund on [http://www.lpf.org.uk](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** | | [Bullying and Harassment](https://intranet.westlothian.gov.uk/article/33212/Bullying-and-Harassment) |  | | [Code of Conduct for Employees](https://intranet.westlothian.gov.uk/article/33213/Code-of-Conduct) |  | | [Disciplinary Code](https://intranet.westlothian.gov.uk/article/33214/Discipline) |  | | [Equality and Diversity](https://intranet.westlothian.gov.uk/article/33215/Equality-and-Diversity-Policies-Procedures-and-Guidance) |  | | [Health and Safety Policy](https://intranet.westlothian.gov.uk/article/72562/WLC-Health-and-Safety-Policy) |  | | [Internet, Email and Social Media Policy](https://intranet.westlothian.gov.uk/article/33223/Internet-Social-Media-and-E-Mail) |  | | [Misuse of Alcohol, Drugs and other Substances](https://intranet.westlothian.gov.uk/article/33240/Alcohol-and-Drug-Misuse) |  | | [Personal Safety at Work Guidance](https://intranet.westlothian.gov.uk/article/72550/Personal-Safety-at-Work-Procedures) |  | | [Smoke Free Policy](https://intranet.westlothian.gov.uk/article/33239/Smoking) |  | | [Supporting Attendance at Work Policy](https://intranet.westlothian.gov.uk/article/33238/Supporting-Attendance-at-Work) |  | | | |

|  |  |
| --- | --- |
| **Informal Meeting to Review Induction** | |
| * Review of first 2 weeks |  |
| **By End of First Month** | |
| **Mandatory Induction E-Learning to be completed by the end of the first month**:  Please ensure that the employee completes the 2 mandatory modules below on the MyLearning platform:   * Freedom of Information Requests * Prevent – Counter Terrorism   If the employee is in a **managerial role** they must complete 4 further mandatory modules   * Supporting Attendance at Work Policy * Mentally Healthy Workplace for Managers * Disciplinary Procedure * Bullying and Harassment | |

|  |  |
| --- | --- |
| **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 |  |