

Once all relevant aspects of Induction have been completed please sign below, keep your own copy and give a copy to your manager.

**Signatures**

**Date**

Manager \_\_\_\_\_

Inductee \_\_\_\_\_


The University is committed to ensuring every staff member taking up a new role at Ulster receives an effective Induction. Therefore, if you have any feedback on your induction experience please email [pcd@ulster.ac.uk](mailto:pcd@ulster.ac.uk).



# INDUCTION CHECKLIST

The University believes in a “shared responsibility” approach to Induction. Induction is an ongoing learning process in which you are actively encouraged to participate. The checklist below can be used as a guide to information you may seek and questions you may want to ask to ensure that all those involved in your Induction, including yourself, deliver an effective Induction. The contents can be discussed and used in conjunction with your Line Manager and/or Induction Colleague, or any other colleagues involved in your Induction.

This is not an exhaustive list and not all suggestions may be applicable to all situations; similarly there may be other activities or information that need to be added to the list. If your department already has its own Induction Checklist, this may be used in place of or alongside these suggestions.

**Name** \_\_\_\_\_ **Staff Number** \_\_\_\_\_

**Line Manager** \_\_\_\_\_ **Department/School** \_\_\_\_\_

When you start your new role, what specifically takes place on your first day and in your first week will vary according to your familiarity with the role/the University etc but it is likely to include some if not all of the following:

## 1. Introductions

I've met:

- my line manager / supervisor
- my induction colleague (if required)
- my head of department or school / director
- my local administrator (if relevant)
- my immediate colleagues
- my mentor (applies to academic posts)

**Completed**


## 2. Orientation

- I have my staff ID card and staff number
- I have gone through the University Online Welcome and Orientation Programme

**Completed**


I'm now aware of:

- my main work area(s) and equipment, e.g. photocopier, stationery supplies, storage space, telephone etc.
- where refreshments/catering are available on campus
- where useful facilities are (toilets/bank/sports centre)
- my mail collection point
- car parking areas and arrangements
- general layout of my main campus
- weekly fire alarm testing; fire evacuation assembly points and fire exits

**Completed**


Is there additional information I would find useful e.g. if unfamiliar with the local area where campus is located?

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### 3. Financial information

- I know when first pay day is
- I know who to contact re salary/pension scheme issues

Completed


### 4. Introduction to the induction process

- I have discussed how my induction will proceed over next days/weeks
- The probationary process has been satisfactorily explained
- I have a clear understanding of how my induction links to the probationary process

Completed


### 5. Understanding operations and procedures in my area

I have a clear understanding of:

- my area's purpose/ objectives/ plan
- the structure for my area (who's who)
- departmental calendar of events
- meetings I need to/can/should attend
- departmental communications, including website
- finance procedures and regulations, e.g. purchasing items, claiming expenses
- administrative systems, e.g. how to book a room/get things printed or photocopied
- expectations in regard to starting and finishing times; expected working hours
- how meal breaks and cover arrangements operate
- how to arrange annual leave
- how to comply with Sick Leave procedure (or other absence arrangements)
- codes of practice regarding access and use of equipment for personal use, e.g. telephone, email
- issues of confidentiality
- how to access technical / administrative / secretarial support
- any social activities and useful networks in department

Completed


### 6. IT and other equipment

- I can login to my PC/laptop and email
- I have been shown the shared drives and directory structures
- I have been shown relevant University business applications (if applicable)
- I can access the University Portal
- I can access email/info remotely (if required)
- I have information about using my voicemail
- I know how to access my local intranet (if applicable)

Completed


### 7. Developing into my role

An explanation of the probation process should take place early on in the Induction. At an appropriate time (perhaps week 2 or sooner) it is important to discuss and agree with your manager specific objectives for the probationary period, the performance standards and any support and development required relating to the achievement of these.

Completed

- Objectives have been agreed
- Performance standards have been agreed


I've had a useful discussion about:

- my job role and how it contributes to the purpose of my area/university
- colleagues outside my dept/school with whom I should interact (and how this will be facilitated)
- what **essential** training and development I am required to complete eg online courses such as: Data Protection; Equality and Diversity Awareness Training; Health and Safety and Disability Awareness Training and for Academic staff eg PgCHEP or Fellowship of the Higher Education Academy;
- what on the job training may be required
- potential training and development requirements for the future

Completed


### 8. Other information you might find useful (space is left for you or your manager to fill in other items that you wish/need to know about)

- Trade Union membership
- Maternity / paternity / adoption leave
- Flexible working policy
- Promotions / regrading procedure
- Policy on alcohol
- Health Assured Employee Assistance Programme (EAP)
- Sustainability in transport, e.g. car share scheme, cycle scheme
- University engagement with Athena SWAN ([www.ulster.ac.uk/secretary/athenaswan.htm](http://www.ulster.ac.uk/secretary/athenaswan.htm))
- Bullying and Harassment (Dignity at Work) Policy & Procedures

Completed


### 9. What happens next?

- Having established the foundations for your Induction, it is important you are beginning to feel confident in your role. To continue this progress you may wish to schedule a further meeting (s) with your manager.
- As you become more established in your new role, and the need for Induction to continue lessens your discussions will be in the context of Probation and your first Developmental Appraisal Review.
- Please note - For academic staff, Heads of Schools are required to report annually on the probationary progress of staff, formal appraisal procedures do not apply until staff have completed probation. The objectives set for the final year of probation will normally provide the framework for the first Developmental Appraisal Review.

Date(s)
