# **Induction Checklist**

**January 2024**

Name: Line Manager: Start Date:

If you have any issues with this checklist, please contact [HR.Employment Policy](mailto:RMx7160@ucl.ac.uk)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| TYPE | Activity | Timescale | Who | Comments | Date completed |
| 1. Pre-employment admin | Arrange for a contract request to be submitted on [Talentlink](https://liveuclac.sharepoint.com/sites/UCL.StaffRecruitment/SitePages/TalentLink-Training-Resource.aspx) or [My HR Departmental transactions](https://ebsappxlv-sso.adcom.ucl.ac.uk:4443/oam/server/obrareq.cgi?encquery%3DJpp%2BdeLcgs8d0mt5ImNgC7H%2B0jga6fmXuHBqRuenB%2FzuV9EdD3aJNw2A6U4DL9FZ1E4lTs%2B%2FMYcYAPzNgO1%2FrPupRXreHI2%2BlmC57onaLJ9oEciXP1UbQoNUYWQBJxR1Hm1AHqb8UhhIciRegWnsAYt4xkOCE1VmsG6fqm1s%2BgzIbGFaz7BHdVEiEdD4C3NjLCYMTbFEIC7GAFTVA9iQm9Lb5cBgc7ciZxv0%2Fv8dnXvrHaaBdF3hrDXFiurhiP5%2B%2FPIfZckHc%2BAt1A27TmjaJnpS3F1QNE9tBQ3UjqqMiKNEws7blOHb3Cbn0TnaldwOwogimo%2BcnuaUmqONJuNRLUpoGms%2BylKHoQW9BfjvQy0ibUyoZOdbbIXsL6NjTyjV%20agentid%3DEBSLIV_ebscorelv-liv.adcom.ucl.ac.uk_4444%20ver%3D1%20crmethod%3D2&ECID-Context=1.005kRrf5sD32vHt_wdO5yW000DS4000042%3BkXjE) through your Departmental Administrator or via the [BOS team](https://www.ucl.ac.uk/staff/professional-services-hub/ps-hub-business-operations-services). | When job offer accepted |  |  |  |
| If the person recruited is under the age of 18, the Safety Services - [Young person’s guidance](https://www.ucl.ac.uk/safety-services/policies/2020/aug/young-persons) must be reviewed and followed | When job offer accepted |  |  |  |
| Ensure references are requested as detailed in the  [Recruitment and Selection Policy](https://www.ucl.ac.uk/human-resources/recruitment-and-selection-policy#References) | When job offer accepted |  |  |  |
| **Disability declaration and support** Ask applicant whether they require any [reasonable adjustments](https://www.ucl.ac.uk/equality-diversity-inclusion/equality-areas-and-support/disability-equality/defining-disability-and-reasonable-adjustments) and/or wish to declare a health condition or [disability](https://www.ucl.ac.uk/equality-diversity-inclusion/equality-areas/disability-equality) before their start date. If required, make referral to [UCL Workplace Health](https://www.ucl.ac.uk/human-resources/health-wellbeing/occupational-health) for recommendations on reasonable adjustments. Consider completing an [Adjustments](https://www.ucl.ac.uk/equality-diversity-inclusion/equality-areas-and-support-staff-students-and-managers/disability-equality/defining-disability-and) Passport jointly with the employee. Consider whether a [Personal Emergency Evacuation Plan](https://www.ucl.ac.uk/estates/safety-ucl/fire-safety/accessible-fire-safety) will be required. | When job offer accepted |  |  |  |
| If required, securely send [Certificate of Sponsorship (CoS) application form](https://www.ucl.ac.uk/human-resources/working-ucl/hr-services/immigration) and supporting documents to [HR Services Team](mailto:hr-services@ucl.ac.uk) | When job offer accepted |  |  |  |
| If required, ensure [Disclosure and Barring Service (DBS)](https://www.ucl.ac.uk/human-resources/policies/2018/apr/dbs-checks-and-criminal-convictions-policy) check is completed. Contact [HR Services](mailto:hr-services@ucl.ac.uk) for more information. | When job offer accepted |  |  |  |
| Identify a suitable workspace/desk/lab bench as required, with any additional cupboards, lockers, pedestals.  [Agile Working](https://www.ucl.ac.uk/professional-services/agile-working) | Before Start |  |  |  |
| 2. Order equipment | Order any additional necessary equipment and stationery e.g., uniform, safety equipment | Before Start |  |  |  |
| [Order Laptop / Desktop](https://www.ucl.ac.uk/procurement/agreements/desktops-laptops)  [Order a mobile phone and or desk phone](https://www.ucl.ac.uk/isd/services/telephony/mobile-telephone-services-isd) and extension number if appropriate. Instruct ISD to add extension and number to outlook contact and people directory | Before Start  Before Start |  |  |  |
| Verify email and IS account with [ISD.](https://www.ucl.ac.uk/isd/help-support) Request ISD to give employee access to all required systems and folders | At least 48 hours before Start |  |  |  |
| 3. Set up systems | Ensure [access](https://www.ucl.ac.uk/isd/staff/admin-systems/how-to-register-for-ucl-administrative-systems) to other role specific systems have been set up:   * Talentlink * MyHR Department Transactions * EDRM | Week 1 |  |  |  |
| Confirm start date, hours and location   * Include arrangements for first day – who to report to, adjusted start time for first day? | Before Start |  |  |  |
| 4. Comms: | Deal with any outstanding queries from new starter  And discuss job description if not done so already | Before Start |  |  |  |
| Announce details of new joiner to wider team | Before/at Start |  |  |  |
| Ensure new starter is added to various distribution lists, networks, org. chart etc. | Before/at Start |  |  |  |
| Create Induction plan and timetable *(use next section 6a-6e. for guidance)* | Before Start |  |  |  |
| 5. Plan Induction | Appoint a mentor if appropriate | Before Start |  |  |  |
| Book meetings with key people | Before Start |  |  |  |
| Print off Org Chart, UCL Structure Wheel & get ready booklet on [Ways of Working](https://www.ucl.ac.uk/human-resources/policies-advice/ways-working) and [Welcome pack](https://www.ucl.ac.uk/human-resources/learning-development/ucl-welcome-space/ucl-organisational-structure). | Before Start |  |  |  |
| Meet and greet employee, take them to [security](https://www.ucl.ac.uk/staff/task/get-new-id-card-replace-broken-id-card) for ID pass | Day 1 |  |  |  |
| 6.  Day One Induction | [Direct the employee to access their computer account details on-campus or remotely](https://www.ucl.ac.uk/isd/services/user-ids-passwords/new-student-and-staff-registration/staff-registration) | Day 1 |  |  |  |
| Introductions to immediate team and issue welcome pack, direct to [UCL Welcome Space](https://www.ucl.ac.uk/human-resources/organisational-development/training-inductions-and-leadership/ucl-welcome-space) | Day 1 |  |  |  |
| Tour of immediate working area including kitchen facilities, toilets, break out areas. Ensure new starter is comfortable with desk arrangements and equipment. | Day 1 |  |  |  |
| Complete mandatory local Fire [Safety](https://www.ucl.ac.uk/estates/safety-ucl/fire-safety/fire-training) Induction and [local fire checklist TN086](https://liveuclac.sharepoint.com/sites/UCLFireSafety/Shared%20Documents/Forms/AllItems.aspx?id=%2Fsites%2FUCLFireSafety%2FShared%20Documents%2FTechnical%20Notes%2FUCLFire%5FTN%5F086A%20%28LocalFireSafetyInduction%26AnnualStaffFamiliarisationGuide%29%2Epdf&parent=%2Fsites%2FUCLFireSafety%2FShared%20Documents%2FTechnical%20Notes)  [Complete local Safety Induction](https://www.ucl.ac.uk/safety-services/local-safety-induction-checklist-managers)  Complete [mandatory online courses](https://www.ucl.ac.uk/human-resources/organisational-development/training-inductions-and-leadership/mandatory-training):   * UCL fire safety * UCL safety induction * Data Protection and Freedom of Information * Information Security Training with Cybsafe (Access to folders, data and systems should not be given until this training has been completed) | Day 1 |  |  |  |
| Ensure employee has returned signed contract. Are there any outstanding queries? | Day 1 |  |  |  |
| Ensure bank details are entered on [MyHR Self Service](http://www.ucl.ac.uk/myhr) or [Inside UCL](https://app.ucl.ac.uk/InsideUCL/). The employee will not get paid if this is not done. | Day 1 |  |  |  |
| Ensure emergency contact details are entered on [MyHR Self Service](http://www.ucl.ac.uk/myhr) or [Inside UCL](https://app.ucl.ac.uk/InsideUCL/) |  |  |  |  |
| Complete a [workstation self-assessment](https://www.ucl.ac.uk/safety-services/policies/2022/feb/display-screen-equipment-dse-assessment) | Week 1 |  |  |  |
| 7. Week One | If applicable, set up desk phone extension PIN and voicemail. See [Telephony Services](https://www.ucl.ac.uk/isd/services/telephony-services). Or show how to use [Teams Calling](https://liveuclac.sharepoint.com/sites/SharePointandMicrosoftTeams/SitePages/Teams-Calling.aspx). | Week 1 |  |  |  |
| Train employee on [using MS Teams](https://liveuclac.sharepoint.com/sites/SharePointandMicrosoftTeams) | Week 1 |  |  |  |
| Show employee how to create [email signature](https://www.ucl.ac.uk/isd/how-to/add-signature-outlook-2016-for-windows). | Week 1 |  |  |  |
| Discuss any pre-arranged leave and show how to make requests through [MyHR Self Service](http://www.ucl.ac.uk/myhr) and [Inside UCL](https://app.ucl.ac.uk/InsideUCL/) | Week 1 |  |  |  |
| Read absence notification procedures/provide contact details – [Sickness Absence Policy](https://www.ucl.ac.uk/human-resources/sickness-absence-policy) | Week 1 |  |  |  |
| Refer to the Staff Induction webpage and [One Professional Services page](http://www.ucl.ac.uk/hr/od/induction/index.php) | Week 1 |  |  |  |
| Refer to the [HR policies and procedures](https://www.ucl.ac.uk/human-resources/policies-procedures-and-advice) pages for key policies | Week 1 |  |  |  |
| Refer employee to the [Disclosure of Conflict and Declaration of Interest Policy](https://www.ucl.ac.uk/enterprise/about/governance-and-policies/ucl-disclosure-conflict-and-declaration-interest-policy) and ask them to disclose any conflicts via MyHR.  All Grade 10 staff must submit an [annual declaration of interest on the dedicated system.](https://app.ucl.ac.uk/InsideUCL/SSOLoading?returnURL=/DeclarationOfInterest) |  |  |  |  |
| Ensure employee knows who to contact for various sources of support e.g. the [EAP](https://www.ucl.ac.uk/human-resources/health-wellbeing/occupational-health/employee-assistance-programme-eap); [Workplace Health](https://www.ucl.ac.uk/human-resources/health-wellbeing/staff-and-student-health); [Dignity at work Advisors](https://www.ucl.ac.uk/equality-diversity-inclusion/dignity-ucl/dignity-advisors); [Employee support networks/groups](https://www.ucl.ac.uk/human-resources/pay-benefits/staff-networks-and-groups), [HR Business Partner](https://www.ucl.ac.uk/human-resources/about-hr/contacting-hr/people-hr/hr-business-partnering-contact-details) UCL’s recognised [Trade Unions](https://www.ucl.ac.uk/human-resources/policies/2020/sep/trade-unions) | Week 1 |  |  |  |
| Book onto [Welcome Event](https://www.ucl.ac.uk/human-resources/learning-development/ucl-welcome-space/ucl-welcome-event) | Week 1 |  |  |  |
| Arrange other role specific training needs e.g. [Safeguarding](https://ucl.learnupon.com/saml/init?redirect_uri=/catalog/courses/1094143) for those who have a DBS check; [Arena](https://www.ucl.ac.uk/teaching-learning/professional-development/ucl-arena) (for teaching staff) [Open Science](https://www.ucl.ac.uk/library/open-science) (for research staff); how to use various systems and platforms, list here: | Week 1 |  |  |  |
| Refer to [LinkedIn Training](https://www.ucl.ac.uk/isd/linkedin-learning) site for wider training courses. | Within first 6 weeks |  |  |  |
| * Further [Mandatory Training Online Courses:](https://www.ucl.ac.uk/human-resources/organisational-development/training-inductions-and-leadership/mandatory-training)   • Introduction to Equality, Diversity and Inclusion  • Change possible: Sustainable UCL  • Disclosing and Managing Conflict of Interest  • Prevent at UCL | Within first 6 weeks |  |  |  |
| 9. End of Probation | Ensure all [mandatory training](https://www.ucl.ac.uk/human-resources/learning-development/mandatory-training) has been completed. | Final meeting |  |  |  |
| Complete required [probationary paperwork](https://www.ucl.ac.uk/human-resources/files/recordofallprobationarymeetingsdocx-0) as per the [Probation Policy](https://www.ucl.ac.uk/human-resources/ucl-induction-and-probation-policy) | Final meeting |  |  |  |
| Probation meeting dates and outcomes should be logged via [Manager Self-Service.](http://www.ucl.ac.uk/myhr) | Review(s) and Final Meeting |  |  |  |
| Ensure new objectives are set to commence UCL Appraisal cycle |  |  |  |  |
|  |  |  |  |  |

Line Manager to email completed form to [hr-services@ucl.ac.uk](mailto:hr-services@ucl.ac.uk) to file on personal file on EDRM

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