

## WELCOME TO CITY OF YORK COUNCIL Local Induction Checklist

This document is intended as a tool for managers and teams to welcome new staff to the Council. It includes most things that all staff should know. However as this covers all areas of the Council, not everything on this list will be relevant to all; please mark N/A where appropriate.

The timescales given are an indication of how quickly certain items should be covered. Not all points are equally urgent, however they can be addressed sooner if appropriate.

There will also be some items that are job or department specific, and that new starters need to know. These can be included in the “LOCAL” sections before saving or printing the document.

This checklist can be:



- 1) Printed out – to allow you or your employee to tick off the items as they are covered. Both should sign it when completed.



- 2) While the document is open on screen – you can click on the links, in order to access other documents or areas on Colin, where you can find out more information.

Since the links can become out of date, please only use the latest live version from Colin each time, rather than a locally saved version.

If you do find links that do not work, or where documents are out of date, please can you email the [HR Business Centre](#) so that they can be corrected. Many thanks.

## WELCOME TO CITY OF YORK COUNCIL

### Local Induction Checklist

**This form is to be completed by the Manager and new starter as appropriate.**


**It must be sent to HR Business Centre (HRBC) to be saved on the individual's personal file, at the end of the 3 month induction period.**

**This checklist covers standard information which should be provided for new starters, and may be supplemented by directorate specific information as appropriate to the nature of the post.**



**Casuals should receive the information that is in the "1<sup>st</sup> day" column.**

***Before use, please check that you have the latest version from Colin.***


|                               |  |                        |
|-------------------------------|--|------------------------|
| <b>Employee Name :</b>        |  | <b>Emp No:</b>         |
| <b>Job Title :</b>            |  |                        |
| <b>Department:</b>            |  | <b>Directorate:</b>    |
| <b>Date of Commencement :</b> |  | <b>Work Location :</b> |
| <b>Manager's Name :</b>       |  |                        |


| PRE-COMMENCEMENT  | Things to do:   | Completed |
|---|---|-----------|
|  | <ul style="list-style-type: none"> <li>Payroll notified of start date, pay details etc and ensure establishment is up to date. See <a href="#">New starter - guidance and forms</a></li> <li>Meetings with manager diarised + Meet the team</li> <li>Nominate a 'Buddy' to look after them on first day</li> <li>Office equipment / tools / protective clothing made available</li> <li>Place booked on "Introduction to York" briefing. <a href="#">Booking Form</a></li> <li>Contact ICT to arrange: PC access via <a href="#">ICT self service</a>.</li> <li>Send email to <a href="#">ICT Service Desk Mailbox</a> to arrange Telephone number (+ Pick up or Hunt groups if applicable).</li> <li>Arrange appropriate access to relevant systems eg iTrent, FMS, P2P</li> <li>Appointment made to obtain CYC ID / swipe card(s)</li> <li>Identify appropriate H&amp;S assessments for job <a href="#">see SMS compliance notes</a></li> <li>Identify and arrange any essential on the job training</li> <li><i>Other LOCAL action:</i></li> </ul> |           |

## WELCOME TO CITY OF YORK COUNCIL Local Induction Checklist

| TOPIC  | Key Learning Points<br>(tick when completed, or show N/A)   | <input checked="" type="checkbox"/><br>By end of: |                         |                          |                          |
|--|---|---|-------------------------|--------------------------|--------------------------|
|  |   | 1 <sup>st</sup><br>Day                            | 1 <sup>st</sup><br>Week | 1 <sup>st</sup><br>Month | 3 <sup>rd</sup><br>Month |
| <b>OVERVIEW OF THE DEPARTMENT</b>                        | <b>Welcome!</b>                                |   |                         |                          |                          |
| <b>Structure</b>   | • How the team / department / directorate fit together  |   |                         |                          |                          |
|  | • Other key teams the jobholder will come into contact with   |   |                         |                          |                          |
|  | • How the Council operates: <a href="#">be Connected</a>  |   |                         |                          |                          |
| <b>Key people</b>  | • Names / job titles of supervisors / managers within the department. Show the reporting line up, through to the Director       |   |                         |                          |                          |
|  | • Link to <a href="#">Corporate Leadership Group</a> page on Colin  |   |                         |                          |                          |
|  | • Other key names the employee will need as part of their job   |   |                         |                          |                          |
| <b>Job Description</b>                                   | • How the job fits into the organisation  |   |                         |                          |                          |
|  | • Review understanding of the Job Description   |   |                         |                          |                          |
|  | • Make clear job + team objectives (especially for first few months) + set Personal objectives                                  |   |                         |                          |                          |
| <b>ADMINISTRATION &amp; PROCESSES at CYC</b>             | <b>What does that mean for employees?</b>  |   |                         |                          |                          |
| <b>Official paperwork completed and returned to HRBC</b> | • ID card + security  |   |                         |                          |                          |
|  | • Copy of appointment form signed with Contract No.   |   |                         |                          |                          |
|  | • Pension form completed, if necessary  |   |                         |                          |                          |
|  | • Collect P45 / P46 if possible   |   |                         |                          |                          |
|  | • Ensure all paperwork / iTrent input is completed and forwarded to payroll before monthly deadline                             |   |                         |                          |                          |
|  | • Explain/issue Statement of Main Terms and Conditions including salary progression – ask to sign and return 1 copy             |   |                         |                          |                          |
|  | • Next of kin form (to be completed and returned)   |   |                         |                          |                          |

|  |  |  |  |  |  |
|--|--|--|--|--|--|
| <b>Administration</b>                    | • IT user name   |  |  |  |  |
|  | • phone set up + use (voicemail/transfer/hold)   |  |  |  |  |
|  | • Stationary / tools + where to access more  |  |  |  |  |
| <b>Payroll / Time management</b>         | • Break / lunch times  |  |  |  |  |
|  | • Flexi sheets   |  |  |  |  |
|  | • Rota / shift work  |  |  |  |  |
|  | • Holidays, and local rules (eg dates that cannot be taken due to service needs)   |  |  |  |  |
|  | • Annual Leave card  |  |  |  |  |
|  | • See <a href="#">Annual Leave</a> entitlement calculator and other useful documents   |  |  |  |  |
|  | • Overtime claims  |  |  |  |  |
| <b>Claims</b>                            | • Expenses, travel costs, making bookings, training courses / conferences  |  |  |  |  |
| <b>Transport Issues where applicable</b> | • See <a href="#">Workplace Transport information</a> to explain the use of CYC cars, or for employees using their own vehicles for work |  |  |  |  |
|  | • If using CYC vehicles: check and take copy of Driving licence and Insurance  |  |  |  |  |
|  | • Explain and issue Car Mileage Sheets see <a href="#">travel &amp; subsistence</a> policy   |  |  |  |  |
|  | • Explain the use of Pool bikes see <a href="#">e-motion</a>   |  |  |  |  |
| <b>Information systems</b>               | • Colin + add personal/ team info, inc photo   |  |  |  |  |
|  | • Outlook calendars  |  |  |  |  |
|  | • iTrent self service  |  |  |  |  |
|  | • FMS (if necessary)   |  |  |  |  |
| <b>Building</b>                          | • Open hours + access  |  |  |  |  |
|  | • Kitchen facilities   |  |  |  |  |
|  | • Protocols  |  |  |  |  |
|  | • Re-cycling   |  |  |  |  |
| <b>Useful Contacts / Support</b>         | • IT helpdesk  |  |  |  |  |
|  | • Payroll + Benefits   |  |  |  |  |
|  | • Switchboard / name finder  |  |  |  |  |
|  | • Medical: York Hospitals NHS Foundation Trust   |  |  |  |  |
|  | • Employee Counselling service   |  |  |  |  |
|  | • <a href="#">First Contact</a> Network (FCN)  |  |  |  |  |
|  | • Trade Unions   |  |  |  |  |
| <b>In your team</b>                      | • Teas/coffee/milk   |  |  |  |  |
|  | • Emergency contact details  |  |  |  |  |
|  | • Post in / out  |  |  |  |  |

|  |  |   |  |  |  |
|--|--|---|--|--|--|
| <b>Further Management Responsibilities (during first three months of employment)</b> | <ul style="list-style-type: none"> <li>Meet regularly with manager to review progress as part of the probationary procedure.</li> </ul>  |   |  |  |  |
|  | <ul style="list-style-type: none"> <li>Set objectives in accordance with <a href="#">staff appraisal scheme</a> and review development needs</li> </ul>  |   |  |  |  |
|  | <ul style="list-style-type: none"> <li>Ensure employee has attended “Working for York” briefing/received notes of briefing</li> </ul>  |   |  |  |  |
| <b>POLICIES AND PROCEDURES</b>   | <b>How does the Council support its employees?</b>   |  |  |  |  |
| <b>Benefits</b>  | <ul style="list-style-type: none"> <li>Ensure employee has received the Voluntary Benefits booklet from <a href="#">Your Rewards - staff benefits</a> and understands how to access benefits, savings and discounts</li> </ul> |   |  |  |  |
|  | <ul style="list-style-type: none"> <li>Application / forms for benefits to non-casual staff eg default entry into pension scheme, <a href="#">Staff Lottery</a> etc</li> </ul>   |   |  |  |  |
|  | <ul style="list-style-type: none"> <li>Pay scales: Where job sits, and how increments work</li> </ul>  |   |  |  |  |
|  | <ul style="list-style-type: none"> <li><a href="#">Bus</a> ticket loan</li> </ul>  |   |  |  |  |
|  | <ul style="list-style-type: none"> <li>Salary sacrifice schemes for <a href="#">Childcare Vouchers</a> and <a href="#">Cycle 2 Work</a> loan</li> </ul>  |   |  |  |  |
| <b>Performance management</b>  | <ul style="list-style-type: none"> <li>Team York programme</li> </ul>  |   |  |  |  |
|  | <ul style="list-style-type: none"> <li>PDR’s</li> </ul>  |   |  |  |  |
|  | <ul style="list-style-type: none"> <li>Learning &amp; Development</li> </ul>   |   |  |  |  |
|  | <ul style="list-style-type: none"> <li>Capability process</li> </ul>   |   |  |  |  |
| <b>Absence management</b>  | <ul style="list-style-type: none"> <li>Reporting absence</li> </ul>  |   |  |  |  |
|  | <ul style="list-style-type: none"> <li>Self certification + RTW interviews</li> </ul>  |   |  |  |  |
|  | <ul style="list-style-type: none"> <li>Sickness triggers</li> </ul>  |   |  |  |  |
|  | <ul style="list-style-type: none"> <li>Employee Counselling (self referral) + Occupational Health service</li> </ul>   |   |  |  |  |
| <b>Codes of conduct</b>  | <ul style="list-style-type: none"> <li><a href="#">Code of Conduct</a></li> </ul>  |   |  |  |  |
|  | <ul style="list-style-type: none"> <li><a href="#">Declaration of Staff Conflict of Interests</a></li> </ul>   |   |  |  |  |
|  | <ul style="list-style-type: none"> <li><a href="#">Gifts &amp; Hospitality</a></li> </ul>  |   |  |  |  |
|  | <ul style="list-style-type: none"> <li>Confidentiality</li> </ul>  |   |  |  |  |
|  | <ul style="list-style-type: none"> <li>Electronic Communications policy <a href="#">ECP</a></li> </ul>   |   |  |  |  |
| <b>Equality</b>  | <ul style="list-style-type: none"> <li>CYC’s Equality policy + what to be aware of in this particular job</li> </ul>   |   |  |  |  |
|  | <ul style="list-style-type: none"> <li>Ensure employee is aware of the <a href="#">Employment of Disabled People procedure and guidelines</a></li> </ul>   |   |  |  |  |

|                                     |  |  |  |  |  |
|-------------------------------------|--|--|--|--|--|
| <b>Dignity at Work</b>              | <ul style="list-style-type: none"> <li>Policy and Guidelines</li> <li><a href="#">First Contact</a> support</li> </ul>   |  |  |  |  |
| <b>Disciplinary &amp; Grievance</b> | <ul style="list-style-type: none"> <li>Overview of policies and access to <a href="#">HR pages and A-Z</a> on Colin</li> </ul>   |  |  |  |  |
| <b>PROTOCOLS &amp; HOUSEKEEPING</b> | <b>Working for the Council</b>   |  |  |  |  |
| <b>Health &amp; Safety</b>          | <ul style="list-style-type: none"> <li>Risk assessment – need for job specific training? (eg manual handling / use of specific equipment)</li> <li>Access to <a href="#">Health &amp; Safety</a> information on Colin</li> <li>Arranged attendance on specialist training courses e.g. manual handling/food hygiene as appropriate</li> <li>First Aiders + Accident book</li> <li>Eye Test examination information - <a href="#">eye test form and recommendation of optician</a></li> <li><i>Other LOCAL specific aspects:</i></li> </ul> |  |  |  |  |
| <b>Evacuations</b>                  | <ul style="list-style-type: none"> <li>Fire Evacuation procedure and test arrangements for <u>all</u> locations they work from</li> <li>Fire Warden system + last one in office/workplace to take card from blue box</li> </ul>  |  |  |  |  |
| <b>SMART working</b>                | <ul style="list-style-type: none"> <li>Explain Hot-desking</li> <li>Principles behind Flexible working opportunities</li> <li>Discuss working from home needs where appropriate (eg Entrust card or other equipment)</li> </ul>  |  |  |  |  |
| <b>Communications</b>               | <ul style="list-style-type: none"> <li>Team meeting arrangements</li> <li>Colin + buzz</li> <li>standard signatures / out of office</li> <li>Standard formats (CYC logo/departmental and <a href="#">styles</a>)</li> </ul>  |  |  |  |  |
| <b>Decision making process</b>      | <ul style="list-style-type: none"> <li><i>Sign off process i.e. what goes to cabinet / members, role of CMT etc</i></li> </ul>   |  |  |  |  |
| <b>Finances</b>                     | <ul style="list-style-type: none"> <li><i>Authority to sign off (where relevant)</i></li> <li><i>Who to request authorisation from</i></li> </ul>  |  |  |  |  |

|                                  |  |  |  |  |  |
|----------------------------------|--|--|--|--|--|
| <b>Other LOCAL requirements:</b> | <ul style="list-style-type: none"> <li>List local action points here:</li> </ul> |  |  |  |  |
|----------------------------------|--|--|--|--|--|

|   |  |
|---|--|
| <b>Confirmation of Induction process:</b>   |  |
| <b>I confirm that all of the above information has been provided to me</b><br>Signed by Employee _____ Date _____ |  |
| <b>I confirm that all the above tasks have been completed</b><br>Signed by Manager _____ Date _____               |  |

A copy of this signed form must be sent to the HR Business Centre to be added to the employee's file.