# Template for a job induction

A checklist should ensure that both the new worker and their line manager know what has or has not been covered and when.

They both need a copy which should be kept up to date, so they can follow what is happening. It can also act as a reminder of anything that needs particular attention.

While a checklist is helpful, it should not turn the induction into a tick-box exercise. It should be the responsibility of both management and the new starter to ensure all items are properly covered.

The checklist is often drawn up by the employer’s HR department in consultation with other staff, such as a safety officer, line manager or supervisor, workplace representative and training officer.

You can adapt or develop this checklist to meet your needs, for example for someone who works from home. It is best used in conjunction with [Acas guide to induction](https://www.acas.org.uk/acas-guide-to-staff-induction).

## Job induction checklist

Name of worker:

Job title:

Start date:

Date completed (with new worker's signature):

## First day

Welcomed by: [name of person meeting the new starter]

* show new starter where they will be working
* introduce them to their line manager, people they'll work with, including someone to help them settle into the job, for example a 'buddy'
* show new starter basic facilities such as toilets and staff room
* deal with any important documentation such as their P45, National Insurance number and security pass
* outline health and safety requirements – for example, emergency and evacuation procedures

[Signed by]

[Notes]

## First week

Introduction to the organisation:

* explain who’s who and how the organisation works
* give a brief history of the organisation
* outline future plans and developments

[Signed by]

[Date]

[Notes]

New worker's job:

* explain their role and how it fits in the team or organisation
* outline expected performance and how it will be assessed
* outline training and career development

[Signed by]

[Date]

[Notes]

Run through the terms and conditions of employment:

* hours and breaks
* when they'll get paid
* holiday entitlement
* pension information
* make sure the worker understands them and has them in writing

[Signed by]

[Date]

[Notes]

The organisation’s important rules on:

* job performance
* probationary period
* discipline
* absence – including sickness absence and sick pay
* use of company internet, email and phones
* dress code, parking and smoking
* maternity / paternity / parental / shared parental / adoption and neonatal leave policies
* notice periods
* making a complaint – for example about bullying and harassment
* where the worker can find more details – for example the staff handbook

[Signed by]

[Date]

[Notes]

The employer must:

* complete documentation on new worker's appointment for their personal file, to be kept securely
* keep records confidential and in line with [General Data Protection Regulation (GDPR)](https://www.acas.org.uk/archive/gdpr)

[Signed by]

[Date]

[Notes]

Health and safety:

* provide detailed training on health and safety in the organisation – for example a risk assessment of the worker's workstation

[Signed by]

[Date]

[Notes]

## 

## First month

* set out work objectives and how performance is assessed
* explain that passing the probationary period depends on performing satisfactorily
* discuss training or learning and development opportunities
* outline the organisation’s commitment to equality and diversity
* provide details of any workplace representation, including any trade union membership

[Signed by]

[Date]

[Notes]

Towards the end of 4 weeks:

* have an informal meeting with the new starter to assess how they are adjusting to their role, and whether they have any coaching or training needs, or other concerns

[Signed by]

[Date]

[Notes]

## At 3 months

* review how the new starter is settling in and performing
* identify any development needs, set timescales for achieving them and adjust work targets (if needed)

[Signed by]

[Date]

[Notes]

## At 6 months

* review performance and complete a final probation report (if used)

If the worker passes the probationary period:

* send a letter to confirm successful completion
* look to the next 6 months and agree any new work objectives, and any experience, coaching or training needs

If the worker fails their probation, the worker and line manager might agree to:

* extend the probationary period in line with the organisation's policy and provide more support or training
* decide they do not have the skills needed, and end employment

[Signed by]

[Date]

[Notes]

## At 12 months

* ask the worker for feedback on their induction – what worked well and what could be improved?

[Carried out by]

[Date]

[Notes]