

# Staff Induction

## Professional Services Staff



**Name of Inductee:**

**Line Manager:**

**Induction Facilitator:**

**Start Date:**

**Job Title:**

**Contact Details:**

**Contact Details:**

# Induction Checklist - for Professional Services staff

- This document lists the areas that must be covered during the induction element of the onboarding process. Line Managers (LM) should agree with the nominated Induction Facilitator (IF) who will be delivering each part (suggestions have been made in the table below). The [Further Signposting](#) page on the staff onboarding site provides links to key departments and information and should be used in conjunction / support of this document. This document provides both specific subjects to be covered and suggestions for wider conversations to ensure that new joiners have a positive onboarding experience.
- Faculties, Departments and Services might have inductions that cover specific local requirements, these should be delivered in addition to the information in this document and not replace it.
- Please talk through all of the relevant areas and initial the 'Confirm Discussion' column as required (person being inducted is to initial). Please place N/A next to any areas not relevant to the work area indicating that this point has not been discussed.
- Once complete both the manager and member of staff being inducted should sign and date the form. This can be done electronically. The form should be saved in the new joiners local records and be available in the event of any audits or inspection.
- Health and Safety: This document covers the generic health and safety requirements for all staff. If you work in an environment that requires more specific safety considerations such as laboratories, workshops or use specialist equipment you must visit the [Health and Safety web pages](#) or contact the [Safety Team](#) for guidance about additional induction requirements. A note should be made on this form of any additional discussions or training completed.
- Areas with an \* are likely to only be relevant if working at a University of Exeter owned site or campus but they should still be discussed to ensure everyone is content with arrangements.

**Bespoke Inductions** (where required these should be used in addition to this generic list, they do not replace it):

- **Managers:** Members of staff who will be taking on a management/leadership/staff supervisory role should complete the associated induction checklist in addition to this list. The New Managers Induction checklist can be found on the [Academic staff](#) and [Professional Services staff](#) pages.

**Day 1:** The following should be completed or discussed on the first day at work:

Induction Area	Requirement / Discussion points	Suggested lead	Confirm discussion (initial or N/A)
Onboarding programme	Confirm the onboarding process and run through the onboarding programme. Discuss the roles of the manager, induction facilitator and buddy (if relevant).	LM	
<a href="#">Welcome to the University</a>	Welcome to the team – find out about and discuss the University values, structure, strategies, community and current news.	LM	
Access and support	Confirm any assistance or wider support needs: <a href="#">Disability Support for University Employees</a>	LM	
<a href="#">Health and Safety Hub - Home</a>	Ensure all workspace needs are discussed whether at home or on campus. Discuss your work environment, equipment and any additional needs. <ul style="list-style-type: none"> <li>Complete a <a href="#">DSE Guidance (sharepoint.com)</a></li> </ul>	LM or IF	DSE Assessment complete:
<a href="#">Emergency information for staff *</a>	Explain and show fire exits, fire evacuation procedure and assembly points; how to raise the alarm and confirm the fire alarm test day. Explain who to contact in an emergency.	LM or IF	
<a href="#">First Aid</a>	Identify how to contact a first aider in the building and the process for accident reporting.	LM or IF	
<a href="#">IT Account creation and Multi Factor Authentication</a>	Ensure IT account set up is completed including the Multi-Factor Authentication. Visit the <a href="#">Introduction to IT Services</a> if you need more information or help.	LM or IF	
<a href="#">Complete online mandatory training</a>	Complete the 'All Staff' mandatory training courses. All new staff should have an email about this requirement in their Outlook account when they first log on. Discuss the training once complete including any questions that arise.	LM	
<a href="#">ID card</a>	Apply for or pick up staff University identification card.	LM or IF	
<a href="#">Employment Documentation</a>	Confirm all the required employment documentation has been completed.	LM	

**Wider discussions:** The areas above are mandatory and must be discussed with all new staff members. Also consider wider discussions that might be necessary on day one for particular roles, personal circumstances or working locations. For new colleagues make sure that by the end of the day you have covered everything that you would like to know ready for your next day at work. Don't worry if you can't remember everything you are told on day one, the [Onboarding web pages](#) provide information that you can revisit at any point.

**Week 1:** The following areas should be completed or discussed during the first week of employment:

Induction Area	Requirement / Discussion points	Suggested lead	Confirm discussion (initial or N/A)
Job role	Discuss the role (go through the job description in order to understand each part of the position). Agree initial work objectives. Assess any required development and highlight key contacts who can help you with work.	LM	
<a href="#">Terms of Employment</a>	<ul style="list-style-type: none"> <li>• Agree working patterns.</li> <li>• Explain arrangements for reporting absence from work.</li> <li>• Explain annual holiday entitlement and how to book and record leave.</li> <li>• Discuss how and when you get paid.</li> <li>• Signpost to information about the relevant pension scheme.</li> </ul>	LM	
<a href="#">Health and Safety</a>	Discuss lone working procedures for your work location. Confirm any specific health and safety considerations for your role such as PPE, RPE, COSHH, risk assessments, work equipment regulations, manual handling, guidance if working in labs, dealing with lasers, radiation or field work. Your line manager <u>must</u> discuss the health and safety needs of your role with you.	LM/IF	
<a href="#">Exeter Professional</a>	The Exeter Professional provides you with the information and signposting you will need in order to successfully progress your career and develop yourself.	LM	
<a href="#">Faculty, Service and Dept inductions</a>	Confirm whether there is a Faculty, Service or Department induction that you are required to complete.	LM or IF	
<a href="#">Additional Mandatory training</a>	Check whether your role requires you to complete additional mandatory training, for instance Corporate Conscience, specialist equipment, finance and management courses.	LM	
<a href="#">Wellbeing and Support</a>	Consider any additional support. Discuss the wellbeing and support opportunities available to staff. This could include discussions around parental or caring responsibilities, sports facilities, the multi-faith chaplaincy, joining a union etc. Also visit the <a href="#">Further signposting</a> pages for information about staff networks and focus/support groups including parents and carers, LGBTQ+, international staff, research networks, BME, disabled network, Armed Forces community and many more.	LM	
<a href="#">Communication and IT Systems</a>	Possible areas to cover: <ul style="list-style-type: none"> <li>• Telephone extension and set up</li> <li>• Set up signature block and Outlook basics such as key calendar dates</li> <li>• Connect to relevant Teams channels and SharePoint sites</li> <li>• Signpost to SID online and IT Helpdesk</li> <li>• Post / Mail collection system</li> <li>• Room bookings</li> </ul>	LM or IF	

Communicating with the team and networking	What are the team / department working arrangements? How should team members communicate with each other? When and how do meetings take place - team, department and 1:1s? Confirm any other communication methods used or networking opportunities.	LM	
<a href="#">University all staff welcome event</a>	Book onto the <a href="#">University all staff welcome event</a> - this session allows you to visit (virtually) a range of University departments and attend a presentation and Q&A session with a member of the Vice-Chancellors Group.	LM or IF	
<a href="#">Trent Self Service</a>	Log into the system and view the information it contains and how to access it, this might include booking leave, reviewing pay etc.	LM or IF	
<a href="#">Finance</a>	Discuss any requirements around finance, this might include claiming personal expenses and the <a href="#">T1 System</a>	LM or IF	
<a href="#">Orientation*</a>	Tour of buildings and campus, this should include - security services, access to photocopiers, social areas, sports facilities, multi-faith chaplaincy and library. Virtual tours are available.	LM or IF	
<a href="#">Organisation and structures</a>	Look in more detail at the organisation and structures relevant to your post/role, discuss key contacts.	LM	
<a href="#">Contacts and Helpdesks</a>	Cover those helpdesks and contacts that are both generic and role specific ie IT Helpdesk, SID online and Finance Helpdesk.	LM and IF	
<a href="#">Green Exeter - sustainability and travel options</a>	The University is committed to sustainability and greener choices. This includes areas such as recycling and travel. Discuss travel options available to you and any support you might need.	LM or IF	
<a href="#">Remote / Home Working</a>	Make sure you have everything you need if working remotely.	LM or IF	
Assign a Buddy?	Discuss the possibility of having a buddy or mentor from the team who can help with those early stages when getting to know the role.	LM	

## Beyond Week 1: Additional areas to cover over the first month:

Induction Area	Requirement/Discussion Points	Suggested lead	Confirm discussion (initial or N/A)
Probation Review and objectives	Once you become more comfortable with your role you should review and refine your probation objectives, you might also have more questions around your role. Make sure regular meetings are scheduled with your manager to discuss progress.	LM	
<a href="#">Staff Development Opportunities</a>	Consider your wider development needs and training that might be useful for your role. The University encourages a culture of coaching and mentoring, consider taking on one of these roles or asking for a mentor or coach for your development: <a href="#">Coaching</a> and <a href="#">Mentoring</a>	LM	
<a href="#">Performance and Development Reviews</a>	PDR conversations are a great opportunity to pause, reflect and think about the next steps, as well as making time to consider your wellbeing and to recognise your current and future workload. Discuss the PDR process with your manager,	LM	
<a href="#">Library Resources</a>	Discuss accessing resources available for all staff.		
<a href="#">Staff News</a>	There are lots of ways to keep informed about University news, a few are: Jargon Buster, Staff Bulletin, Team Briefs, VCEG talks.	LM and IF	
<a href="#">Technology Enhance Learning (TEL) and ELE</a>	Visit <a href="#">Technology Enhanced Learning Sharepoint Page</a> to learn about digital teaching tools including ELE (Exeter's virtual learning environment for students).		
<a href="#">Our students, The SU and The Students' Guild</a>	Discuss our students and the role of the Guild, and the SU who we work closely with. Even if your role isn't student facing you will still be providing vital support towards the student experience. It is also important to discuss the University Code of Conduct in relation to students and specifically <a href="#">Relations between staff and students</a> , as well as learning how we can help any students who might be struggling with life at University through the <a href="#">Mental Health and Suicide Safety: Supporting students training</a> .	LM	

### Additional discussions:

Note below additional areas you might wish to cover, they may be specific to your role, location or personal needs or concerns. It is suggested that you look through the areas covered in the [Further Signposting](#). You could also list/discuss useful contacts for the role.

Induction Area/Contact	Requirement / Discussion Point / Contact Details	Discussed with LM or IF?

### Required Actions:

Please complete the table below to identify any actions or training requirements that need to be taken forward:

Action / Training	Date to be completed:	Signed off once complete:
Date of next catch up with: Line Manager: Induction Facilitator: Buddy:		
Agree dates and methods to meet team members and key contacts		
Probation review dates:		

### Sign off:

<b>Staff member name, signature and date</b>	
<b>Manager /person carrying out induction name, signature and date</b>	