Induction/Onboarding Toolkit

This document is designed to guide you through the induction of a new employee, making sure you have covered all your legal requirements and with some ideas and suggestions. Every company is different and there is no one-size-fits-all but there issues common to all new employees, this guide is intended to help you build a bespoke process for yourself.

At the end of the document is an example process which you might find useful.

Pre-Day 1

Before the employee comes in for their first day, these are some things you should have done to be prepared.

- Ensure they have received an offer letter which sets out the basic terms such as the job role, pay, and conditional requirements such as references or criminal record checks and mentions the probation period applicable.
- Have a contract of employment/statement of main terms prepared if you have not already issued it. **Note: from April 2020 you are required to give the contract on or before the first day of employment.**
- If you have an employee handbook on paper, make sure you have a copy ready. If you issue various separate policy documents you should have those ready too – it is important that the employee has access to them at the start of employment.
- Get their ID and IT access set up and ready to go, check they can access everything they need to.
- Order any equipment they may need to do their job.
- Get their desk/workstation ready and make sure they have all the equipment on it that they will need. Do clean the desk, equipment and drawers to make sure the previous incumbent has not left anything behind. First impressions count, and an employee who arrives to a crumb-strewn keyboard and junk-filled drawers may not stay long!
- Prepare an induction plan and make sure all the people needed are in work that day – arrange substitutes or reschedule things if necessary. Print a schedule of activities to give to the employee.
- Make sure they are added to any company lists such as email lists, etc.
- Tell the employee where to report and Day 1 and who to ask for.

Day 1

Make sure the employee's line manager is the first one to meet them and start the induction process. Some key things to cover:

- Introduce the new employee to the rest of the team and other key staff (but not too many as they will not remember them all!)
- Do practical things first – location of the toilets, washing facilities, kitchen and arrangements for breaks etc
- Explain purpose of new employee's role – you may have done this at interview but they are unlikely to remember the detail
- Explain structure of department and wider company
- Explain office security arrangements, issue fobs/ID, give door code(s) etc
- Explain restrictions re: smoking, use of phones, mobiles, mobiles while driving, etc., whatever is relevant to their job role
- Explain dress standards/PPE for the unit, etc
- Confirm procedure to be followed in the event of sickness or other absence

Health & Safety

All employees will need some health and safety induction covering basics such as fire alarms, first aid etc. Other employees will need a more detailed induction. Health and Safety can also be covered by online training as well as in person. However you do it, it is important you have records signed by both parties showing that you have covered the required elements for the role.

Suggested issues to cover are:

- Read and understand the Company's Health & Safety Policy (and environmental policy where applicable)
- Make sure the know who the Health and Safety Manager is and how to raise any issues/concerns with them, likewise if you have a health and safety committee
- Location of fire exits and importance of keeping them clear at all times
- Location and use of fire extinguishers/alarm call points etc
- Explain the evacuation procedure and make sure they know where the assembly point is
- Location of first aid boxes and identity of first aiders
- Location of accident book and recording of accidents/near misses
- DSE risk assessment where applicable
- Identify any PPE clothing/equipment needs and provide/order it (make sure you have a signature from the employee receiving it acknowledging rules of provision and use)

Make sure the employee signs something to say they have received these instructions.

HR & Admin

In regards to employment documentation, do make sure you have all the contractual documents signed before or on Day 1 as that is when the employee is most motivated to sign them. If they do not provide signed documents, it is easy for them to use the "I didn't know" excuse at a later date.

Electronic signatures are acceptable and online system will often remind them if they do not do it, plus you can see exactly when they have signed key documents.

It goes without saying that the first thing you must check is the employee's right to work in the UK. See separate guidance note for that.

Note: it is commonly assumed that a British driving licence or national insurance number are proof of identity. They are not. If in any doubt about what documents are acceptable, check out

https://www.gov.uk/government/publications/right-to-work-checklist

In regards to the general issues to be covered, here are some suggestions:

- Right to work documents provided and copied
- Proof of other legal requirements such as driving licences, business car insurance, professional qualifications needed to do their job, etc.
- Obtain signed copies of contract, job description, handbook and payroll details (NOTE: if you use restrictive covenants in your business, these will not be valid unless the employee has signed them before doing work for you)
- Issue any IT equipment, phones, etc., making sure you have a signed document from the employee. If you have company policies regarding damage, eg if they are deemed to be at fault they are liable for the cost/insurance excess, make sure these are stated on the form
- Explain HR support/systems and contact
- Go through key HR policies; employee privacy notice, salary/pay and expenses rules (if applicable), holiday entitlement and booking, sickness absence, grievances, disciplinary procedure, harassment/bullying, drugs/alcohol. Add in other issues relevant to your workplace such as bribery/gifts, competition/confidentiality, social media, etc. It is very important that if you have specific things in your business which are considered to be gross misconduct (eg receiving gifts from clients) that you bring them to the attention of the employee
- Provide the employee with login details for IT systems and details of support
- Provide the employee with details of relevant insurances, eg car insurance if you provide a vehicle, and other benefits to which they are entitled.

And make sure you have the employee sign to say these have been covered.

Days 1-5

In the first week it is important to arrange activities which will introduce the employee to the organisation without overloading them. Suggestions are:

- Provide someone to help them log in to basic IT systems and set everything up in regards to their desktop and workspace in general, eg location of stationery, paper, use of printers
- Provide more detailed training on specific software packages and where applicable allow them to practice on a test system
- Commence any other job specific or health and safety training

- Arrange for the employee to spend time with key people in other departments to get a wider view of the organisation
- Introduce them to the work they will be doing and get them started, making sure they have access to another experienced employee as a mentor in case their line manager is absent or busy
- Complete a longer term training and development programme (see below)

Weeks 2-5

You are likely to be monitoring them under a probation period, so it is important you can measure their performance in due course. In order to do that, you need a clear programme of training and work activities for the first month or two. Here are some tips on how to build that.

1. Start with the basic legal and training needs such as health and safety and anything specific to your industry
2. Think about the IT systems you need to use to do the job, and build a programme of training which is logical. For example, you could start with how to create a client record on a database, then how to edit, then how to attach new records, etc. Do bear in mind that even if the employee has used the same software in a previous job, it may have been configured differently and their knowledge may have gaps. Try to do the training with practical examples so it "sticks".
3. At the same time, introduce them to tasks which are similar to the system training they have just had so they are implementing that knowledge in a practical way. Make sure there is someone they can ask for help if they are unsure.
4. Gradually introduce more activities once they have shown they have absorbed the earlier training. It is important this is controlled so they do not get overloaded or make mistakes which will discourage them.
5. Arrange for any formal training courses to be carried out during the first month.
6. At the end of the first month, review progress so far and put in another training plan to cover any remaining activities or training required. You are then ready to go on to the probation review.

Onboarding Process

Here is a summary Onboarding process, once you have completed recruitment and made a verbal offer to someone (and they have accepted).

Pre-Start Date	
	Issue offer letter
	Employee confirms start date once they have given notice to current employer
	Start date confirmed to Manager and any other managers involved in induction
	IT and any other equipment such as access cards ordered
	Employee's contractual documents prepared and issued for signature (electronic or physical), along with any other compulsory documents such as Handbook, Health and Safety Policy, Privacy notice, etc.
	Send employee information and confirm start time and person to meet on first day
	Manager ensures desk/equipment is clean and ready
Day 1	
	Manager greets employee and carries out basic orientation
	HR ensures employee has/can access the documents to sign and runs through key policies
	HR checks Right to Work documents, driving licence, qualifications as appropriate
	HR checks payroll info is supplied, employee know process and payment dates and prepares payroll info
	Health and Safety Induction, including fire and other emergency procedures
	Completion of any relevant risk assessments
Day 1-5	
	Introduction to team members and the wider company (make sure they have access to an org structure for reference)
	On the job training and book any external training they need
	Gradually introduce them to departments in the wider company, focussing on those they will interact with most often
	Employee signs off induction process as complete once all equipment is issued and instruction given
Weeks 2-5	
	Gradually introduce employee to the full range of activities in their job, with support as required
	Create a work and training programme with key stages to ensure they understand their role