

New Employee Induction Checklist – White Collar Role

This checklist begins on acceptance of offer and concludes at the end of probation

Name of new employee

.....

Position

.....

Intended start date

..... /

Preparation for induction should commence on the acceptance of an employment offer. Allow enough time to make all arrangements, order equipment and resources that are required for the new employee to settle into the role in the shortest possible time. The specific items required will depend on the position and may be affected by what has been negotiated in the employment contract.

PRE COMMENCEMENT

This checklist is designed to be used following the offer and acceptance of employment and the return of a signed contract.

(Allow enough time to complete the following tasks in preparation for the intended start date)

Complete all tasks that are relevant, mark N/A if not applicable

Start Date minus 10 working days

COMPLETED

TASK

Coordinate IT

- Hardware (laptop/desktop)
- Install software
- Account set up – email, logons, distribution lists and network access
- Set up external access
- Mobile phone
- Desktop phone / allocate number



Start Date minus 5 working days

COMPLETED

TASK

Arrange Communication

- Where the new starter is supervising others, provide verbal advice of the appointment to those team members who will be supervised by the new employee. Include information about previous experience and the intended commencement date
- This must be completed prior to any general announcement
- Pre-commencement organization announcement (**start date minus 2-3 working days**).
- Update Organizational Chart and contact lists with new employee's name



Start Date minus 5 working days

COMPLETED

TASK

Prepare Work Space

- Allocate desk
- Set up desk – stationery, diary
- Order business cards and items of personalized stationery as appropriate
- Prepare welcome kit – uniform + any other item required to complete the job



Start Date minus 3 working days

COMPLETED

TASK

Prepare Documents (in readiness for discussion during induction on commencement)

- Copies of policies
- Key Contact Details
- Operating manuals and location if applicable
- Company information



Contact new starter and confirm

- Start time on day 1
- Who to see/ask for on arrival
- Name and contact details of anyone involved with or assisting induction such as a coordinator, mentor or work buddy
- Confirm parking and or travel and transport arrangements
- Discuss and arrange any special needs
- Confirm what type of staff facilities are available (eg tea, coffee, kitchen facilities etc)
- Discuss nearby facilities – type and proximity of shops, service stations, best access roads and other relevant information
- Advise that you will be sending out forms for completion in regard to payroll – if relevant (Eg payroll start up documents if not previously provided such as tax declaration, employee details form, superannuation choice documents, code of conduct)
- Request that all payroll related documents be completed and returned on day 1 (or prior if you so choose)
- Confirm dress standard or uniforms if required to ensure new employee is comfortable in their new surroundings
- Does the new employee have any questions?
- If you are coordinating the induction on behalf of someone else, report to them on the completion of this task and discuss any issues that have arisen during your conversation with the new employee
- Send out all payroll related forms (as above if relevant)
- Follow up on any other matter that has arisen from the conversation



ON COMMENCEMENT

Day 1 – 5

COMPLETED

TASK

Conduct Induction:

- Workplace & desk orientation – kitchen, toilets, printers, copiers and other equipment available or to be used by the new employee
- Meet the immediate team
- Meet & greet key contacts involved in induction (if relevant)
- Spend time with the new employee, assisting them to become familiar with the allocated computer and network orientation
- Collect all payroll and employment documents and arrange for processing and filing
- Discuss the Position Description, performance expectations (measurements) and check for thorough understanding
- Review key policies, answer questions. If policies require sign off or acknowledgement, collect this or agree on future day/time
- Ensure that copies of all documents are filed on personnel records (contract, personal details, position description, policy sign off)
- Go over all relevant areas of Health & Safety including evacuation and assembly area
- Provide an overview of current tasks, projects and workload and provide thorough brief on allocated responsibilities
- Arrange for hand over of detailed information in relation to task and project assignments
- Agree on regular catch up times – 1st week, regularity thereafter, dates, times etc. Use catch up times to check in on how the person is settling, answer questions, clarify issues and generally ensure that they are comfortable with their new surroundings and work
- Advise the new employee that there will be an end of probation formal review approximately 1 – 2 weeks prior to the end of probation. Closer to that date, you will arrange a time for private discussion
- In the meantime, clarify who to go to with queries, issues etc.



NOTES & THINGS TO FOLLOW UP

END OF PROBATION REVIEW

<u>End of Probation minus 7 – 10 working days</u>		<u>COMPLETED</u>
<u>TASK</u>		
<p>Preparation for end of probation review:</p> <ul style="list-style-type: none"> • Set the time, date and place for a private discussion regarding the approaching end of probation and make an appointment with the new employee at least 5 working days before probation is due to end • Review position description for responsibilities & measurements • Make relevant notes on areas that the employee is completing satisfactorily and areas for improvement, if any • If relevant, check with other people who have been involved in assisting the new employee to settle into the position • Gather customer feedback if relevant • Consider the person's "cultural" fit to the position and the organisation; make notes on areas of concern, if any. • Engage key stake holders (if relevant) in discussion as to the levels of overall satisfaction of the new employee's performance and cultural fit. <p>Agree on whether, at the review meeting, you will be providing either confirmation of ongoing employment <u>or</u> providing notice to end employment under the terms and conditions of probationary employment.</p> <p>Prepare a letter advising the employee of confirmation of ongoing employment <u>or</u> providing notice to end employment prior to or at the completion of the probationary period.</p> <p>ENSURE THAT THE MEETING IS CONDUCTED IN A TIME FRAME THAT ALLOWS FOR THE CORRECT AMOUNT OF NOTICE UNDER PROBATION</p>		<input type="checkbox"/>

**End of Probation minus 7 – 10
working days**

COMPLETED

TASK

Conduct the meeting

- **IF** employment is not to continue, provide verbal notice of your decision. Avoid a detailed conversation on reasons why. It is sufficient to state "sorry, it's not working out"

Hand deliver the prepared letter that confirms that under the terms and conditions of probationary employment; notice is provided to cease employment. (either immediately or at the end of the probationary period)

- **IF** employment is continuing, conduct a detailed discussion on the areas of performance that are satisfactory; provide **constructive** feedback on areas for improvement and hand deliver the letter confirming ongoing permanent employment
- Get feedback from the new employee on how they are feeling about their employment with your organisation
- Deal with any issues that arise
- Get feedback on the induction process and make modifications to any area that requires adjustment or improvement

