New Starter – Induction Checklist for Schools

The Head Teacher or the nominated management representative must complete this form and refer to the *HR Policies Manual* for details of the Induction and Probation policies. Then, use the notes on this form to complete the checklist as tasks are completed during the first six months of employment. You can either print the checklist and complete by hand or complete it in Word.

Employee's details (Please complete this section to identify the new starter.)

Surname: Forenames:

Job title: Section:

Pre-employment checks (The following tasks must be completed before the employment is confirmed.)

☐ Offer letter and documentation sent to new starter (e.g. Terms & Conditions, Equalities & Diversities, Personal & Pecuniary Interests Form, OHS Questionnaire, etc.)	Checked by: Comments:	Date checked:
☐ Applicant's identity confirmed (They have provided one primary form of ID and two secondary forms of ID.)	Checked by: Comments:	Date checked:
☐ Personal and Pecuniary Interests Form received (The applicant has signed and returned the Personal and Pecuniary Interests Form.)	Checked by: Comments:	Date checked:
☐ Employees Starting Form completed by new starter (First section completed with basic details, such as date of birth, address, bank details, pension option, etc.)	Checked by: Comments:	Date checked:
☐ Medical clearance received from Occupational Health (The Medical Clearance Form has been received from the Occupational Health Service.)	Checked by: Comments:	Date checked:
☐ CRB and List 99 clearance received (And any problems are reported to the police and/or the DfES Children's Safeguarding Operations Unit.)	Checked by: Comments:	Date checked:
☐ Proof of eligibility to work in UK received (e.g. Visa, work permit, leave to remain, etc.)	Checked by: Comments:	Date checked:
☐ References received and checked (Two acceptable references received and checked.)	Checked by: Comments:	Date checked:
☐ Qualifications checked (Check the applicant has the relevant qualifications for the job.)	Checked by: Comments:	Date checked:

Prior to the new employee's first day (The following tasks must be completed before the employee's first day.)

☐ Desk and chair arranged, where appropriate. (Ensure starter has a desk and chair arranged for their arrival.)	Checked by: Comments:	Date checked:
☐ Security pass arranged, where appropriate (Ensure a security pass has been arranged for the new starter.)	Checked by: Comments:	Date checked:
☐ Phone/IT access arranged and set up, if appropriate (IT notified so they create an e-mail account, set up software, hardware and other IT services, and arrange a telephone.)	Checked by: Comments:	Date checked:
☐ Other departments notified (Human Resources, Payroll, IT, etc. have been notified of the new starter's arrival.)	Checked by: Comments:	Date checked:
☐ Induction programme and work plan prepared (Cover work plan, health and safety, and internal policies, e.g. probation, capability, disciplinary, grievance, harassment, etc., and policies relating to safeguarding children.)	Checked by: Comments:	Date checked:

On Day 1 (The following tasks must be completed on the employee's first day.)

☐ Employee greeted and introduced to team (And introduced to any other relevant members of staff.)	Checked by: Comments:	Date checked:
☐ Tour of the building conducted (Point out toilets, emergency exits, and places to eat and rest.)	Checked by: Comments:	Date checked:
☐ Health and Safety procedures explained (Cover evacuation, security, first aid and accident reporting.)	Checked by: Comments:	Date checked:
☐ Induction Plan and probation requirements explained (Ensure the employee understands what is expected of them and explain the internal procedures.)	Checked by: Comments:	Date checked:
☐ Objectives set and performance standards explained (Deadlines, quantity and quality of output, skills and protocols that must be learnt, and relationships that must be developed.)	Checked by: Comments:	Date checked:
☐ Overview of school given (Overview of school provided to the employee. Explain how their role fit into the overall structure.)	Checked by: Comments:	Date checked:
☐ Employee given copy relevant documentation (e.g.Procedures.)	Checked by: Comments:	Date checked:

During Week 1 (The following tasks must be completed during the employee's first week.)

☐ Objectives and expectations agreed (And recorded on the Staff Review and Development Form.)	Checked by: Comments:	Date checked:
☐ Meetings arranged with relevant staff from other areas (e.g. staff with whom the new employee will regularly interact as part of their job.)	Checked by: Comments:	Date checked:
☐ Mentor/buddy arranged (if appropriate) (Arrange a mentor/buddy if agreed that it is appropriate for the new starter's development.)	Checked by: Comments:	Date checked:
☐ Code of Conduct Statement received and read (Allow new employee time to read and sign to confirm they have read it.)	Checked by: Comments:	Date checked:
☐ Policies explained and understood (Explain to the new employee that they must read, understand and adhere to our policies. Refer them to the documents on the Intranet and arrange for them to sign the declaration, below.)	Checked by: Comments:	Date checked:

I confirm that I have read, understand and will adhere to the schools' policies and the Code of Conduct.

Name:		Signature:		Date:	

By the end of Month 1 (The following tasks must be completed by the end of Month 1.)

☐ Regular 1:1s held (Discuss issues and review progress against agreed expectations and objectives.)	Checked by: Comments:	Date checked:
☐ Induction programme with The Learning Trust arranged (Induction training has been arranged for the new starter.)	Checked by: Comments:	Date checked:
☐ Job Holder's Risk Assessment Form completed (Risk assessment is conducted to ensure the job can be carried out safely.)	Checked by: Comments:	Date checked:

By the end of Month 3 (The following tasks must be completed by the end of Month 3.)

☐ Regular 1:1s held (Discuss issues and review progress against agreed expectations and objectives.)	Checked by: Comments:	Date checked:
☐ Three month progress report completed (Complete a three month progress report outlining any issues and areas to work on.)	Checked by: Comments:	Date checked:

By the end of Month 5 (The following tasks must be completed by the end of Month 5.)

☐ Five month progress report completed (Complete a five month progress report outlining performance and whether employment will be confirmed.)	Checked by: Comments:	Date checked:

By the end of Month 6 (The following tasks must be completed by the end of Month 6.)

☐ All induction issues addressed (Confirm that any issues raised during the induction have been addressed.)	Checked by: Comments:	Date checked:
☐ Probation approved (Confirm that the employee has successfully completed the probation period.)	Checked by: Comments:	Date checked:
☐ Letter confirming appointment sent (A letter confirming the appointment has been sent to the employee.)	Checked by: Comments:	Date checked:
☐ Induction Checklist completed (Confirm that the Induction Checklist has been successfully completed.)	Checked by: Comments:	Date checked:

Headteacher's name (or nominated rep):		Signature:		Date:	