

## Local Induction Checklist (New Employees)

**Please place a signed copy on the employee's personal file.**

**Non- Clinical:** To be completed and recorded on DOT within 10 days of first day.

**Clinical (those on QPO or CSSIP):** To be completed within 10 days of joining the clinical area.

Full name of employee		Date of commencement	
Job title		Checklist completion date	
Ward / Department		Date recorded on DOT	

Actions to be completed- ideally on employee's first day in work area	V/N/A
Warm Welcome:	
<b>Introduce your new employee to colleagues</b> – give a full tour of ward or department, ensure you include fire exits and local evacuation procedure / points.	
Explain line manager reporting and supervisory arrangements	
Outline <b>buddy/new employee support</b> or <b>mentor arrangements</b>	
Ensure employee is aware of the range of <b>work-life balance polices and support available</b> building upon the information received through the Welcome Lounge and at Corporate Induction.	
COVID -19 – special arrangements	
Ascertain that the individual risk assessment has been completed and ensure any additional measures highlighted are put into place.	
Explain that safety of all of our staff working whether in direct contact with patients or working in support services across all areas of the Trust is of paramount importance to us.	
Explain that the environment has changed with the introduction of safety measures for COVID 19 which include social distancing measures, directional signage and hand hygiene and cleaning processes.	
Point out all of the support that is available to staff particularly highlighting the <a href="#">support and other resources</a> on the CUH Staff Portal.	
Important to ensure:	
<b>Staff Appointment Form (SAF)</b> has been completed and sent to Payroll, Box 112 without delay – including the P45 (original only) if employee provides this. (If employee produces this at a later date it must be sent to Payroll, Box 112 with employee name and job title) <b>Please note:</b> - Payroll cut off is 13 <sup>th</sup> day of the month to receive salary payment on the 25 <sup>th</sup> of the same month. Forms received after 13 <sup>th</sup> , the first salary will be the 25 <sup>th</sup> of the following month. Please discuss with employee if this will cause any financial hardship and inform <a href="mailto:Payroll.services@addenbrookes.nhs.uk">Payroll.services@addenbrookes.nhs.uk</a> / ext. 254525 to discuss options available for advance payments.	
<b>The Principal Terms (contract)</b> are sent to employees electronically. Print 2 copies, one to pass to your new employee (some employees may not have access to print this at home), and one for you to place on their personal file.	
<b>The ID Badge application form</b> has been obtained and the importance of wearing ID at all times discussed. For those staff that have attended Qualified Practitioners Orientation (QPO) or Clinical Support Staff Induction Programme (CSSIP) ID badges are administered on these programmes.	
Issue <b>uniform/ protective clothing as appropriate</b> . Include a discussion about location of available <b>Personal Protective Equipment (PPE)</b> and how to wear and take care of it and discuss Radiation Protection as appropriate.	
Ensure processes completed for employee to have a access to email and IT systems e.g. EPIC, shared drives/departmental networks (as applicable) – on the 'service portal' home screen click 'services' tab at the top, browse 'catalogue', 'CUH _New Users/Network Accounts', click on the 2 <sup>nd</sup> option 'CUH_Create New User' or 'Epic Account.	
Job Role, Performance, working arrangements and leave	

Discuss the <b>job description</b> and the <b>Trust Values</b> and <b>behaviour expected</b> from all employees ensuring staff are helpful, <b>kind, courteous</b> to patients, visitors and other staff regardless of role. For those in line management roles include discussion of the <b>Leadership Behaviour Standard</b> . Offer an opportunity for queries and clarification.	
Discuss the <b>aims/objectives/purpose</b> of ward or department - include the types of patients cared for, if working in a clinical area, and any <b>specific needs</b> and/or <b>safe working practices</b> relevant to the ward/department/speciality to be aware of.	
Discuss arrangements for <b>regular support, catch ups and 1:1 discussions</b> as applicable. Explain the <b>3 month review</b> discussion and arrange a suitable date, continue to discuss this by stating how this will then lead into the <b>annual appraisal cycle</b> .	
Outline the <b>Preceptorship</b> process, where there is a formal preceptorship presence in place (e.g. Nursing, midwifery, AHP,ODP)	

Ensure you confirm:	
Employee's <b>hours of work</b> , shift arrangements and unpaid breaks and any local rules.	
Employee's <b>annual leave entitlement</b> and arrangements for requesting annual or other types of leave and responsibility to take leave within the leave year – ensure you consider their length of service (if a new employee has 5, 10 or more completed years NHS service you should obtain confirmation of the aggregated completed years of service from Payroll <u>before</u> confirming with your new starter).	
<b>MAPS and rostering arrangements</b> and the process for requesting changes (where applicable).	
Arrangements for <b>public holidays</b> occurring after the start date and pro rata for part time employees.	
The <b>absence reporting &amp; sickness process</b> ; self-certification, monitoring and return to work arrangements.	

Health, Safety and Well-being matters:	
Discuss how to <b>Raise Concerns</b> relating to the standard and safety of care provided to patients, or any other possible danger, risk, wrongdoing or malpractice.	
Discuss the importance of <b>reporting</b> incidents/accidents /near misses/breaches to security, incidents of violence/aggression/ bullying & harassment and the process to do so.	
Discuss the importance of being open and honest and the <b>duty of candour</b> .	
Ensure employee understands the appropriate use of <b>Trust telephones for business and not personal use</b> .	
If your new employee has made a self-declaration of a disability that requires any <b>adaptations/adjustments</b> discuss the arrangements in place.	
If Occupational Health/Cambridge Health at Work have requested the employee makes an appointment to <b>discuss any risks/hazards/immunisation/infection control</b> identified discuss arrangements to follow this up.	
If the role involves exposure to hazards which may cause adverse health effects (such as respiratory/skin sensitizers, noise, vibration, heavy metals etc.) complete the <u>Base-line Occupational Health Surveillance form</u> as relevant to the role. For further advice please contact <a href="mailto:health&amp;safety@addenbrookes.nhs.uk">health&amp;safety@addenbrookes.nhs.uk</a> .	
If your new employee is <b>under 18 years old</b> , ensure a Young Person's Risk Assessment is discussed and completed. This can be found in the <u><a href="#">Young Person's Health and Safety process</a></u> on Merlin.	
If the role requires the employee to work for long periods of time at a desk/PC undertake a <b>Display Screen &amp; Equipment (DSE) risk assessment</b> . This can be found in the <u><a href="#">Display Screen Equipment policy</a></u> on Merlin.	
Ensure the employee understands the <b>emergency procedure</b> in their area of work, including <b>local fire safety procedures</b> . Ensure employee is aware of emergency numbers (Cardiac Arrest 2222, Fire & Security 3333, Psychiatry 4444, Ambulance 9999). If the employee may not be able to reach an ultimate place of safety unaided or within a satisfactory period of time in the event of any emergency, ensure a bespoke evacuation plan is put in place in line with the <u><a href="#">Personal Emergency Evacuation Plan Procedure</a></u> .	
Explain any <b>resuscitation and other key equipment</b> relevant to role/area of work.	

The relevant <b>health and safety hazards</b> specific to the employee's workplace/role and the control measures that they need to take to carry out their work safely (refer to the local H&S risk assessments). Ensure the employee is informed where the local health and safety risk assessments are stored.	
The relevant <b>safety procedures / protocols / safe working practices</b> related to their work and that they know where they can be accessed and any additional training required to carry out their tasks safely	
<b>Conflicts of Interest:</b> Ensure the employee is familiar with the Trust's <a href="#">Conflicts of Interest policy</a> . Discuss requirements to register any conflicts of interests and the circumstances where gifts or hospitality must also be registered on the Trust's online register <a href="#">Declare</a> Further guidance can be obtained from <a href="mailto:declarations@addenbrookes.nhs.uk">declarations@addenbrookes.nhs.uk</a> / ext. 256256	

<b>Policies and Procedures for discussion</b>	
Highlight any local policies and procedures that are relevant to the job role/ward/department and where to locate these on <a href="#">Merlin</a> .	
The Supplementary Terms provides a summary of key employment policies/processes. Inform the employee they can obtain more information about these through <a href="#">Connect/HR consult</a>	
Explain the No Smoking on campus requirement, and what this means for employees, and any additional processes in the ward/department relevant to patients/visitors.	
Describe any local arrangements for safe and effective waste management and highlight 'Think Green Waste and Recycling' initiative.	
If the employee might be lone working, outline the safety arrangements in place.	
<b>MyESR – Employee Self Service</b> (Electronic Staff Record) – <b>Access</b> the link on Connect Portal, the direct link to ESR <a href="http://my.esr.nhs.uk">my.esr.nhs.uk</a> , or by downloading the MyESR app from the App Store or Google Play.	
This will give them easy online access to: <ul style="list-style-type: none"> <li>• View, print and save Payslips, Total Reward Statement (including annual pension statement) and P60</li> <li>• Check and update personal details including address, bank account, contact phone numbers, emergency contacts and equality and diversity information</li> <li>• View absence history</li> <li>• View employment history</li> </ul> <p>Access is created automatically once the employee has been hired on ESR – to obtain their login details the employee should use the 'Forgotten Username' link on the login page and enter their Addenbrooke's email address and date of birth. Refer to the <a href="#">MyESR Employee Self Service pages on Connect</a> for more information and user guides</p>	

<b>Mandatory Training, Essential for role, Line Manager Essentials, recommended for role</b>	
<b>Please note: All mandatory and essential training that is relevant to a role will automatically be assigned to the new starters DOT profile</b>	
Ensure <b>Corporate Induction</b> has been attended or booked and that the core mandatory e-learning has been completed prior to starting/ on commencement.	
<b>Basic Life Support (Resuscitation) and Moving and Handling practical refresher training-</b> ensure the employee is booked onto a refresher in their first year of employment avoiding where possible the date of the refresher being in winter months mid-December to early March. For example: Where they commence in January we would recommend booking ahead of winter months and book in October or November. This will therefore ensure their on-going refresher date avoids this period.	
Ensure the employees knows how to access ' <a href="#">DOT</a> ' e-learning portal and describe what can be accessed (mandatory training, essential and other learning opportunities and resources).	
Explain how the following can be accessed through DOT (if applicable to role): <ul style="list-style-type: none"> <li>• <b>Safeguarding Children Level 2* and Safeguarding Adult Level 2 training.</b> Please note: Those attending QPO and CSSIP are provided with time to complete this on these programmes.</li> <li>• <b>Safeguarding Children level 3* and PREVENT</b> If a new starter has completed this elsewhere in the last 3 years they are able to submit certificates/confirmation of this to the DOT team by emailing <a href="mailto:Dot@addenbrookes.nhs.uk">Dot@addenbrookes.nhs.uk</a></li> </ul>	
Discuss local <b>medical device competencies</b> required for role /area of work.	

Demonstrate <b>mattress evacuation</b> and location of evacuation straps if applicable to role referring to the Induction e-learning fire module (for clinical/nursing staff/ staff with patient contact).	
<b>Information Governance Code of conduct</b> describes the obligations of employees and The Trust under the Data Protection Act to ensure all personal/confidential data held is handled legally, securely, efficiently and effectively. All employees receive the Code of Conduct with their supplementary terms. Ensure the employee has read this and is aware of their obligations.	

Outline any additional information that was covered during the discussion, or any questions/points of clarification and any agreed actions for the employee/line manager:

**Confirmation of completion**

**Employee confirmation of local induction completion**

Employee signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Manager confirmation of local induction completion**

Manager signature: \_\_\_\_\_ Date: \_\_\_\_\_

Please record the date and time of the planned 3 month review meeting:

**IMPORTANT REMINDER** for Trust compliance purposes the line manager must provide confirmation this has been undertaken. This is simple to do:

- Go onto DOT to 'My Team Dashboard' (found on the My Team page). Click on the right 'Mark Local Induction (direct reports only)'.
- Once on that page click the relevant course – Local Induction Checklist next to the new employee's name
- On this newly opened page scroll down and tick the box in the 'Mark complete' column, select the completion date, and populate the 'grade' box with '100' then click 'save changes'

**Additional guidance can be found on the 'My Team' dashboards.**

If you cannot see your new employee's name, please do not delay reporting compliance, as an alternative you can email [induction@addenbrookes.nhs.uk](mailto:induction@addenbrookes.nhs.uk) with the employee's name, job title and date of completion.