Managers Checklist For Starters

This checklist provides an overview of the things that need to be considered when a member of staff takes on a position in the organisation, including when they are moving internally.

Things to do before they start

☐	Set up a new starter on google mail and access rights by filling in the new starter form (resources only)
☐	Communities – please follow Communities Group – ICT access requests for information on how to get ICT and Gmail access
☐	Arrange an appointment for an ID Badge / Proximity Card / Parking Permit (if applicable) by calling the Property Hotline on 01926 414123.
☐	Inform them of parking, cycle rack or other such arrangements (if appropriate).
☐	Arrange a mobile phone (if appropriate) through the ICT Service Desk 01926 414141.
☐	Ensure they have access to a telephone and number.
☐	Access to specialist systems and software (e.g. Agresso, Mosaic, etc)
☐	Add to People Finder
☐	Assign a personal locker and issue key (if appropriate)
☐	Arrange for any other work related equipment required for them to fulfil their role.
☐	Order Safety equipment (if required).
☐	Order Uniform and other such equipment (if required).
☐	Plan induction to role, and identify a 'buddy'.
☐	Make arrangements for their first day e.g. who will meet them, where and when.
☐	Contact them to let them know the arrangements for the first day e.g. who they meet, at what time and where.
☐	Once you have the log in details for the employee, you need to contact the IT service desk to have a laptop set up for the new starter. **(This does not apply to desktop workers)**

First day

☐	Welcome them and inform them about what will be involved through their first day, list of events / activities / meetings etc.
☐	Confirm employee has received Contract (Terms & Conditions of Employment) or inform HR Administration on 01926 738444 to obtain another copy.
☐	Explain how the Team works for example Flexible Working Environment, Shared Team Spaces, Desk Sharing, Hot Phones, Lockers/Storage Boxes, Tambours, Standard IT

☐	Kit, Wifi, Multi Function Device, Clear Desk Policy, Break Area, Office Protocols and Flexible Working Agreements.
☐	Discuss working hours, opening hours, breaks and the smoking policy.
☐	Introduce them to a 'Buddy' who can answer their general questions.
☐	Show them their desk and take them round the office, identifying the 'key contacts'.
☐	Complete the Health and Safety checklist which provides essential information e.g. fire evacuation, training requirements, accident reporting procedure etc.
☐	Highlight where the toilets, shower rooms, recycling and other such facilities are.
☐	Inform then about the arrangement for refreshments (tea, coffee, milk and cups).
☐	Show them where to find stationery, the post, and other such resources.
☐	Show them how to use the computer and phone, and find their files on the network.
☐	Get employee to undertake the DSE online assessment.
☐	Give them a temporary proximity card (or other access card / key) until they obtain a permanent one.
☐	If not sent to them in advance, give them their parking pass and / or discuss parking or other transport arrangements.
☐	Arrange access to WILMa (http://warwickshire.learningpool.com/

Your HR
If you have indicated that your new starter will manage others, they will be given access to People Manager and will need to carry out the following checks;

☐	That they have the correct direct reports in their organisation/unit.
☐	That the working patterns are correct for all their direct reports.
☐	That the annual leave entitlement is correct for all their direct reports.
☐	That part time employees have their Bank Holidays/extra day at Christmas included in their leave

Induction

☐	Provide an induction into role (goals / colleagues / peers).
☐	Provide an induction into Service (this is Service Specific).
☐	Ensure they are registered for their induction into Warwickshire County Council (Welcome to Warwickshire) including the required training (this can be done prior to them starting employment as long as the employee has access to WILMa).
☐	It is mandatory for managers to go through 'Staff induction information management procedure' and the supporting checklist will aid this process, found at: http://www.warwickshire.gov.uk/immanagers which is part of the Information Governance Framework policy.
☐	Access the Managers' Induction interactive package through the New Manager

	[Induction page](#) **(For New Managers/New to Role Managers only).**
☐	Ensure all equality and diversity monitoring information is completed

Employee information

☐	Inform them of their next, and subsequent, pay dates see http://www.warwickshire.gov.uk/yourmoney
☐	Let them know how to get information on pensions (if required) through Local Government Pension Scheme, Teachers' Pension Scheme, or Firefighter Pension Scheme.
☐	Inform them about making travel and subsistence claims.
☐	Provide information on annual leave and flex (set their entitlement on Self Service as appropriate and show them how to use it).
☐	Inform them of the sickness absence procedure.
☐	Set up 121 and Appraisals meetings, and inform them of the process.
☐	Inform them of their Probationary Period and the process surrounding this (if appropriate).
☐	Provide information on the E-mail and Internet Code of Practice and discuss this as well as appropriate use of Instant Messaging.
☐	Provide information / discuss the use of mobile phones in the office and personal calls.
☐	Show them where to find general guidance and advice, e.g.: Intranet, and People Finder.
☐	Make employees aware of the Employee / Employers responsibility document.
☐	Make them aware of their responsibilities with regards to Corporate Governance, ensure they have access to the 'do the right thing' information, specifically; Fraud and Whistle Blowing, Financial Management and Procurement, Gifts and Hospitality, Registration of Interests, Access to Information (Data Protection, Freedom of Information and Information Security).
☐	Make them aware of any Political Restrictions in relation to the post and provide the employee with a copy of the Political Restriction Guide
☐	If they are a remote worker, ask them to test their VPN access