INDUCTION AND PROBATION CHECKLIST

Purpose

The purpose of this checklist is to provide a tool for Supervisors to assist them in providing a thorough and timely induction for their new staff. It is also a guide for new staff to enable them to take an active participation in their own induction.

Using the Checklist

This checklist should be:

- Completed by the supervisor in consultation with the new staff member

- Used in conjunction with the induction website for New Staff
  http://www.mq.edu.au/welcome

- Returned to the relevant Staffing Advisor in Human Resources once completed
  (A copy should be kept in departmental files)

Employee Name:

Employee Number:

Position:

Department/Business Unit:

Faculty/Office:

Start Date:

Supervisor Name:

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Pre-Employment		
Induction Activity	**Person Responsible**	**Date Completed**
Pre-Employment		
• HR Staffing Advisor to allocate staff number and advise line supervisor and local HR Manager	HR Staffing Advisor	
• Announce the new staff member's appointment to the team and other relevant staff		
• Confirm starting date with the new staff member and inform them when to arrive, where you will meet them and transport options available. Advise HR Staffing Advisor and local HR Manager of the new staff member's start date. Arrange a time with the HR Staffing Advisor for the new staff member to attend a HR Induction on their first day		
• Build an <u>induction schedule</u> for the first two weeks, including scheduled appointments for new staff member to meet with key contacts		
• Organise workstation / office (telephone, computer, printer, fax access etc.) Request name tag for office (if appropriate)		
• Liaise with IT staff (local or central) to ensure e-mail address and network accounts are set up and active. For local IT, make an appointment for them to come and set up the new staff members computer on day one		
First Day to First Week		
Induction Activity	**Person Responsible**	**Date Completed**
Welcome		
• Collect new staff member from HR and if time permits, take them on a tour of the Campus Hub highlighting the main facilities e.g. ATM's, food outlets, the Spot, Campus Card Office etc.		
• Introduce to immediate work colleagues, office support staff and local Finance, HR, Marketing and IT staff. Show location of toilets, lunchroom etc		
• Organise a team meeting, morning tea or lunch to formally welcome the new staff member		
Access		
• Obtain staff/library card from Campus Card Office (building C5C)	Staff Member	
• Arrange for keys and swipe card to be allocated and signed for		

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First Day to First Week cont...		
Induction Activity	**Person Responsible**	**Date Completed**
Workstation		
• If not already organised arrange for workstation / office, telephone, computer, printer, fax access, name tag for office and other equipment as required for role. If ready, show staff member office / work area		
• New staff member to check that their workstation meets ergonomic requirements (refer to the Office Ergonomics booklet, Ergonomics online module and/or Health & Safety website)	Staff Member	
IT and Communications		
• Demonstrate use of telephone system and assist with the set up of voicemail		
• Ensure new staff member is added to local contact list		
• New staff member to update details on the Macquarie Staff Directory and HR Online	Staff Member	
• Liaise with IT staff (local or central) to ensure printers and faxes are connected		
• Add to any appropriate e-mail circulation list and new staff member to add full signature block to their e-mail setting		
• Show work network directories/drives		
• Advise on internal/external mail processes, photocopying, faxing and obtaining stationery supplies etc		
Work Environment and Campus		
• Advise on non-smoking workplace. Explain appropriate areas for smokers if relevant		
• Ensure new staff member has a copy of the campus map. Show main facilities and explain parking regulations/locations and other transport options – buses and bus routes, cycle paths, bike hubs, train station and car pooling		
Working Conditions		
• Explain: start and finish times, tea and lunch breaks, flexi-time, pay days, leave entitlements, how to apply for leave, child care facilities, visitor procedures etc.		
• Provide the new staff member with a list of names, titles and positions of people who are significant to the new staff member's workplace and to the University in general		

INDUCTION AND PROBATION CHECKLIST

First Week to First Month		
Induction Activity	**Person Responsible**	**Date Completed**
Safety and Security		
• Explain Health and Safety policy and procedures including standards in the Faculty/Office		
• Complete online training – H&S, Ergonomics, EEO, Sustainability (Website)	Staff Member	
• Explain fire and emergency evacuation procedures. Show location of emergency exits, assembly points for evacuation, fire extinguisher locations, emergency equipment and alarm procedures		
• Explain hazard, incident and illness reporting procedures		
• Introduce key safety and security staff, eg, H&S Committee Chair and representative, building/floor wardens, first aider etc		
• Consider any specialised O&S training required to undertake job safely		
• Location of University Security Services – 9850 9999		
Job Role and Responsibilities Discuss the following: • Position description, responsibilities and performance expectations. Identify and plan work appropriate for first week at work. • Explain where role fits within the immediate area, Faculty/Office and University. • Discuss work reporting relationships – provide organisational chart • Explain the probation process and activities required by staff member in order to fulfil probation requirements • Discuss Performance and Development Review (PDR) process and documentation • Discuss job relevant information eg. L&T, Research, HDR, Governance structure. For Managers discuss finance, HR, marketing procedures etc • Identify any job relevant training		
Business Unit Orientation		
• Discuss how the business unit fits into the local and university structure		
• Discuss business units goals and plans and how they fit into the university's goals and plans		
• Identify relevant committees		

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First Month to First 3 Months		
Induction Activity	**Person Responsible**	**Date Completed**
Probation		
• Confirm the performance standards, including any goals and outcomes, in writing within two weeks of employment		
• Meet regularly with staff member to discuss feedback on progress and performance. Keep a record of all meetings held and feedback provided.		
• Conduct a mid-point review, if probation period is longer than 3 months. Discuss work performance, achievement of expectations and development activities (if applicable). Complete PDR report as appropriate.		
• Conduct a formal PDR meeting, one month prior to end of probation. Discuss work performance and achievement of expectations. Complete PDR report as appropriate.		
• Decide to confirm or terminate employment. If terminating inform staff member of decision and state reasons clearly on PDR report. Seek approval from Executive Dean/Head of Office of final decision. Forward completed PDR report together with any written and/or supporting documentation for decision to HR. Include a copy of the completed Induction & Probation checklist.		
Comments by Supervisor		
Comments by New Staff Member		
Is there any further information or support required by the new staff member – if so, please describe here:		

I confirm that I have understood and completed the preceding checklist items

Supervisor Signature: _____ **Date:** ___ / ___ / _____

New Starter Signature: _____ **Date:** ___ / ___ / _____

Once completed, please return to Human Resources (C4B) for placement in employee file.