

Onboarding and Induction Checklist for Managers at Imperial

This checklist has been designed to help line managers plan and execute a successful, informative and welcoming induction for a new starter. This checklist is provided as guidance for the whole College, and any local requirements will need to be tailored to include the specific needs of the respected Faculties and Departments.

Line managers are accountable for the induction process.

Onboarding and Induction consist of many elements. A line manager may want to delegate (or share) some actions and responsibilities to others, for example, an administrator, coordinator, or Departmental Manager.

For instance:

- if a line manager asks an administrator to book welcome meetings, the line manager needs to ensure clarity about participants;
- If an Academic staff manages a Professional, Technical and Operational (PTO) staff, the Academic staff might want to liaise with other PTO staff on specific Induction and Development items and share the responsibility.

However, the line manager remains accountable for the whole process until the end of the probation period and ensures that a new starter has the correct information and feels welcome.

Below are important actions for line managers to cover and complete within specified timeframes. They refer to the main elements of the employee life cycle from recruitment to the end of probation:

1. **Recruitment stage**
2. **Pre-start date**
3. **Day one (3a. Remote; 3b. On-campus)**
4. **Week one**
5. **First-month Induction**
6. **First six months (mid probation and end probation)**
7. **Development plan**

1. Recruitment stage

Line Manager Action	Completed
<p>Before you recruit, review, and consider:</p> <ul style="list-style-type: none"> • How the vacancy fits into the team/department/division • Establish the key requirements of the post • Consider how these requirements should be delivered <p>Contact a Recruitment Administrator to guide you</p> <ul style="list-style-type: none"> • For more details on recruitment, go to A guide to recruiting 	
<p>Learning & Development. The College strives to be an inclusive workplace, so you as a manager need to think about aspects of Equality Diversity and Inclusion as early as</p>	

<p>the recruitment stage to ensure the process is inclusive and follows the College guidelines:</p> <ul style="list-style-type: none"> • Complete/refresh Recruitment & Selection e-learning and face to face (at least one person on the panel should have done the Recruitment & Selection face to face training). • Complete/refresh Unconscious bias e-learning <p>Things to remember:</p> <ul style="list-style-type: none"> • Ensure the language used for the job advert is inclusive • Ensure panel members are representative of diverse backgrounds 	
<p>Use the Talent link to submit your request to recruit. See here for the link to the Online Request to Recruit. You will need to provide:</p> <ul style="list-style-type: none"> • The department that the role will be based in • The location the role will be based at • If an Occupational Health Assessment is required to undertake the role • The advertising channels you wish to use (e.g., jobs, guardian, nature, etc.) • The Job Family and Job Level • The working hours and type of contract associated with the role • Funding details, including cost centre(s) and account code(s) associated with the role • Names of the approval teams • Names of panel members <p>If you need any support, contact: recruitment@imperial.ac.uk, or your local representative</p>	
<p>Start planning Induction as soon as you start recruiting for the role. Having a general plan for your new starter will help you be ready for when they accept the contract and for the start date This checklist is here to help you.</p>	
<p>Liaise with the Recruitment Administrator in relation to the details of the job offer and any required paperwork (for example, in the case of academic and clinical posts, the Consuls' form completed and signed off at interviews) and contract of employment.</p>	
<p>If your recruitment process was unsuccessful, you should still inform HR Recruitment Hub.</p>	

2. Pre-start date

Line Manager Action	Completed
<p>After the hiring decision has been made, HR Recruitment Hub will send the contract to the new starter, with the line manager cc'd. The line manager emails the new starter to:</p> <ul style="list-style-type: none"> • confirm the start date • ask about any specific requests or requirements that the new starter would like to discuss in advance. • Assess if your new starter requires support relating to disability - whether they require any additional equipment or system/equipment alterations due to disability. The Disability 	

<p>Officer should be contacted if a Personal Emergency Evacuation Plan (PEEP) is required. For more information, refer to Disability support.</p>	
<p>Once the new starter's account is created on the College system, the hiring manager should receive an automated email from the ICT Service Desk with the following information:</p> <ul style="list-style-type: none"> • CID number • Job title • Employee type • Start date • College email address • How to activate their account • Check they are granted access to relevant systems, software, resources 	
<p>Email the HR Recruitment Hub team (recruitmenthub@imperial.ac.uk, or your local representative) to confirm that recruitment is completed by sending a completed hire request form and confirmation of:</p> <ul style="list-style-type: none"> • Name of role • New starter name • Start date • Is it a new role or replacing somebody (provide the person's name)? • General requirements for the role (equipment and ICT) • Any specific requirements or adjustments required for the appointed individual (e.g., reasonable adjustments) <p>If your recruitment process was unsuccessful, please inform HR Recruitment Hub: recruitmenthub@imperial.ac.uk</p>	
<p>Strat planning induction for your new starter using this checklist:</p> <ul style="list-style-type: none"> • A good start is to block out time in your diary to meet and spend time with the new starter on their first day and the first week; consider the essential tasks and people your new starter needs to meet • Your new starter might need more frequent catch-ups in their first month. • Plan for development needs and opportunities for your new starter (e.g., local and College-wide training, shadowing, reading) 	
<p>Keep in touch with your new starter before their start date, e.g., email, a quick catch-up, invite them to a team day, or a team meeting.</p>	
<p>In case you are unable to meet them on the first day due to work patterns/conferences and need to delegate specific induction activities, you must arrange this in advance so that your representative can organise their work and have time to prepare. Again, this will help create a good and welcoming impression for your new starter.</p>	
<p>Prepare the induction pack for the new starter to review on Day one. You can either send the documents to your new starter's College email address or print them:</p>	

<ul style="list-style-type: none"> • Welcome letter • College Strategy and Academic Strategy • Imperial Essentials • Imperial Values and behaviours • College Organisation Chart • Your Faculty/Department Organisation Chart • Staff Diversity Networks • Welcome Guide (if your department/team has one) • Key contact details (the new starter's direct team and any other useful contacts: Department Safety Officers, key suppliers, HR contacts, contacts in the Faculty, and people with similar roles elsewhere in the College). • Health & Safety management structure • Guide to leading and managing at Imperial (for line managers) 	
<ul style="list-style-type: none"> • Check that the new starter's workplace is set up (on-campus and remote) a desk, chair, pedestal, and ICT equipment. Contact your local department if a loan laptop is required for home working (Hardware Desktop PC and Software purchase and renewal; Telephones - telephones, fixed extensions, mobile phones have to be ordered via the Telecoms Representative for your department/division, how to place telecom order, also check User Guide for College telephones) • Ensure the new starter have been able to activate their account - they should have received relevant links to the account they applied with. Further information can be found on this ICT webpage. • If you encounter any problems, contact the Service Desk service.desk@imperial.ac.uk 	
<p>Worth remembering:</p> <ul style="list-style-type: none"> • Provide your new starter with details on how and when you/your representative will meet them on their first day (e.g., on-campus, Teams). • Send a welcome email introducing your new team member to your team/department. • As part of the College induction process, it is recommended that all divisions and departments make arrangements for the buddying/mentoring of new members of staff. An induction mentor/buddy is assigned to a new starter to help them through their first weeks at Imperial. • Book your new starter to Imperial Insights (an event for all staff) • (if you are hiring someone with line management responsibilities) Book your new line manager for an Induction session for managers 	
<p>Send an introductory email to the team and other relevant staff, e.g., Department Administration, to introduce the new staff member.</p>	

3. Day one (remote and on-campus)

Right to work documents will already have been checked and scanned during the interview/offer stage. If not, your Department Administrator may assist you in capturing and finalising the documents. The completed Right to work checklist must be sent to the HT Staff Hub before Induction can commence.

3a. Day one - remote Induction

Line Manager Action	Completed
<p>Greet and meet:</p> <ul style="list-style-type: none"> • Meet with the new starter online as per your pre-start date arrangements. Turn on your camera if you can and encourage the use of the camera. This will make people feel welcome. • *Check your new starter is comfortable with their desk and ICT set-up; they can access emails and activate their Imperial College account. <p>(If not, resolve this first and contact ICT Ask if necessary.)</p> <ul style="list-style-type: none"> • Provide an overview of the induction programme • Discuss major components of the job and initial tasks and responsibilities; clarify anything unclear • Confirm working hours • Check any requirements not previously discussed • Ask if they have any questions • Complete the Day One Health and Safety Induction form - it should be completed and discussed even if the individual will be working from home most of the time. 	
<p>Team welcome meeting:</p> <ul style="list-style-type: none"> • Create an opportunity on Day one to introduce the new starter to immediate colleagues (e.g., even a brief meeting) 	
<p>*Ensure that the ICT set is working correctly (Connect and communicate):</p> <ul style="list-style-type: none"> • Access to email • Access to any essential shared drives • Access to the relevant folders on Teams/SharePoint etc. • Access to their allocated desktop PC and how to wake this up remotely if required. Check the College webpage to find out more about remote desktop • Access to a laptop if required; check if your department can supply a loan laptop or contribute to buying a new laptop for home use • Landline phone; if calls need to be diverted to a mobile, ensure this is set up • Explain how to report IT issues using ICT Ask • Ensure the email signature is set-up correctly • Check they have access to the College/Faculty/Department Branded templates for PowerPoint and Word documents. Refer to the College guidelines. 	
<p>New starter to complete the Employees Starter Checklist (sent to the new starter by HR). After your new starter completes it, the line manager checks if everything is correct.</p> <p>The Employees Starter Checklist, the employment contract, and the opt-out pension form (if required) need to be sent to the Finance team/designated person in the department for processing. They will process the form and send it to the College Payroll team to register the</p>	

<p>new starter on payroll.</p> <p>*Payroll dates and deadlines for forms can be found on the Imperial College website. In some cases, the new starter needs to provide their P45 form and the documents specified above.</p>	
<p>Complete the Day One Health and Safety Induction form – it is important to discuss even the new starter works from home most of the time. There is also a guidance note about the form for managers to refer to.</p>	
<p>One to one meeting with line manager:</p> <ul style="list-style-type: none"> • Provide an overview of the induction programme • Provide a list of colleagues (or ask someone to set those meetings for them), in the first instance, the immediate team, and more widely in other departments, that the new starter should contact to meet with and introduce themselves. Some of these meetings might need to take place after a month or two when the new starter has had a chance to understand their role better • Explain what Imperial expectations of its staff (Expectations/Values, EDI) • Introduce to Imperial Essentials and plan time for completing required training with six months of employment (critical areas of Safety, information security, and the working environment; has been developed to ensure that staff are aware of their responsibilities and expected behaviours while working at the College) • Confirm working patterns, hours expected, flexible arrangements if appropriate • Best way to contact you; communication arrangements and expectations with the team 	
<ul style="list-style-type: none"> • Safety for working in labs (if relevant) • Refer to New Staff webpages 	
<p>Inform about ID card:</p> <ul style="list-style-type: none"> • The ID card can be collected at the South Kensington location. This can be done at a later time of employment; check your local arrangements. Your new starter will need to take with them: <ul style="list-style-type: none"> ○ their CID number ○ contract of employment ○ signed Day One Health and Safety Induction Form ○ a photo will be taken at the point in a safe manner 	
<p>Arrange a time to visit campus (if possible)</p> <ul style="list-style-type: none"> • Give a tour of campus, visit the workplace, bathroom, kitchen, safe working arrangements (Covid regulations) • Respect on Campus: Working Together, Protecting Each Other 	

3b. Day one - on-campus Induction

Line Manager Action	Completed
<p>Greet and meet:</p> <p>Meet with a new staff member at your agreed meeting point/time (as you arranged as part of the "pre-arrival" actions)</p> <ul style="list-style-type: none"> • Welcome them to the College • A brief introduction to the department and role • Check any requirements not previously discussed 	

<ul style="list-style-type: none"> • Ask if they have any questions 	
<p>Initial tour</p> <ul style="list-style-type: none"> • Visit workplace • Introduce to immediate colleagues • Bathroom • Kitchens, drinks machines, canteens/restaurants • Campus shops • Security • Photocopiers • Fax/printer machine • Stationery store • Safety in labs (if relevant) 	
<p>One to one meeting between the new starter and line manager - must be carried out by the line manager:</p> <ul style="list-style-type: none"> • Provide an overview of the induction programme • Discuss major components of the job and initial tasks and responsibilities • Provide a list of colleagues (or ask someone to set those meetings for them), in the first instance, the immediate team, and more widely in other departments, that the new starter should contact to meet with and introduce themselves. Some of these meetings might need to take place after a month or two when the new starter has had a chance to understand their role better • Introduce what Imperial expectations of its staff (Values and Behaviours, EDI) • Introduce to Imperial Essentials and plan time for completing required training with six months of employment (critical areas of Safety, information security, and the working environment; has been developed to ensure that staff are aware of their responsibilities and expected behaviours while working at the College) • Confirm working patterns, hours expected, flexible arrangements if appropriate • Best way to contact you; communication arrangements and expectations with the team 	
<p>Check ICT set-up is working correctly</p> <ul style="list-style-type: none"> • Check your new starter is comfortable with their desk and ICT set up; Connect and communicate • Can they access emails and have activated their Imperial College account • Access to any essential shared drives • Access to the relevant folders on Teams/SharePoint etc. • Access to their allocated desktop PC and how to wake this up remotely if required. Check the College webpage to find out more about remote desktop • Access to a laptop if required; check if your department can supply a loan laptop or contribute to buying a new laptop for home use • Landline phone; if calls need to be diverted to a mobile, ensure this is set up • Explain how to report IT issues using ICT Ask 	

<ul style="list-style-type: none"> • Ensure the email signature is set-up correctly • Check they have access to the College/Faculty/Department Branded templates for PowerPoint and Word documents. Refer to the College guidelines. 	
<p>New starter to complete the Employees Starter Checklist (sent to the new starter by HR). After your new starter completes it, the line manager checks if everything is correct.</p> <p>The Employees Starter Checklist, the employment contract and the opt-out pension form (if required) need to be sent to the Finance team/designated person in the department for processing. They will process the form and send it to the College Payroll team so that the new starter is registered on payroll and paid.</p> <p>*Payroll dates and deadlines for forms can be found on the Imperial College website. In some cases, the new starter needs to provide their P45 form and the documents specified above.</p>	
<p>Complete the Day One Health and Safety Induction form. This involves also giving a tour to show emergency evacuation routes etc. There is also a guidance note about the form for managers to refer to.</p>	
<p>Inform about ID card:</p> <ul style="list-style-type: none"> • The ID card can be collected at the South Kensington location later; some local arrangements might be in place. Your new starter will need to take with them: <ul style="list-style-type: none"> ○ their CID number with ○ contract of employment ○ signed Day One Health and Safety Induction Form ○ a photo will be taken at the point in a safe manner 	

4. Week one Induction (Day 2-5)

Line Manager Action	Completed
Send an introductory email to the wider department to introduce the new member of staff; copy them in	
Familiarisation with the Imperial College website	
<p>Send the new starter invitations to relevant meetings</p> <ul style="list-style-type: none"> • Team meetings • Departmental meetings • Consider which meetings/ activities/projects you or colleagues attend that would be useful for the new starter to join as part of their Induction • Relevant committees • Meeting with relevant stakeholders 	
<p>To discuss:</p> <ul style="list-style-type: none"> • Help the new starter understand structures; provide a breakdown of: where the College, the Faculty, the department, the team, and the new starter fits • Reporting structure • The College strategy, local strategy, teaching strategy • Introduction to College Finance; managers are required to complete finance for non-financial managers e-learning (part of 	

<ul style="list-style-type: none"> Enabling Compliance) • Discuss and arrange any immediate training and development requirements, e.g., if training is required before access to specific systems can be allowed (such as ICIS finance modules). • Introduction to using MS Teams, arrange training if required. • Check if there is any other equipment needed 	
<p>For all staff - Discuss and explain Policies & procedures:</p> <ul style="list-style-type: none"> • probation review – arrange those (mid - three months- and end - six months - probation reviews for regular contracts) • arrangements for regular 1-2-1 meetings with the line manager • how to book leave, report sickness on Teamseer (and arrange cover if required) • season ticket loan • study allowance • any relevant local policies • Return to campus • Harassment and bullying support 	
<p>For staff with line management responsibilities - Policies & procedures:</p> <ul style="list-style-type: none"> • Refer to the Guide to leading and managing at Imperial – point of reference to supporting a culture of inclusion, Expectations, H&S, roles, and responsibilities of a manager, employee life cycle: <ul style="list-style-type: none"> ○ Their role in building inclusive culture – EDIC, EDI strategy, EDI courses, Imperial Expectations/Values ○ Recruitment & Selection (including legal obligations when recruiting from outside the EEA), e-learning ○ Inducting new staff ○ Probation (including how to monitor and review) ○ People Management (including arrangements for regular 1-2-1 meetings with direct reports) ○ PRDP process (including your team's current objectives) ○ Managing Sickness Absence (including conducting Return to Work Interviews) ○ Annual leave - arrangements for calculating staff entitlements • Refer to HR webpages: Support for managers 	
<p>Discuss and clarify:</p> <ul style="list-style-type: none"> • their role and job description, • Mutual expectations, • SMART goals, how performance will be reviewed; • Imperial Expectations and Values and their role • Invite questions 	
<p>Discuss wellbeing and how to access support:</p> <ul style="list-style-type: none"> • Reinforce the importance of looking after their wellbeing • Encourage work-life balance, e.g., taking breaks, regular annual leave • e.g. would they like a conversation with a staff disability adviser, if relevant • Live well work well (Occupational Health); Resilience and stress • Confidential Care • Staff Networks 	

<p>Discuss accessing development:</p> <ul style="list-style-type: none"> • College websites - People and Organisational Development • Local and role-specific development – required and optional <ul style="list-style-type: none"> ◦ For managers – Induction for managers, Unconscious bias, Equality diversity and inclusion at Imperial; central development offer for managers • Postdoc and Fellows Development Centre • Free access to LinkedIn Learning – single sign-on 	
<p>Hold a welcome coffee/lunch for the new starter to make with the team, e.g., a meeting or lunch on campus or a meet-up online if working remotely.</p>	
<p>Inform about:</p> <ul style="list-style-type: none"> • Work breaks, using private phone calls and use of the internet • Guidance on dry roles and local rules and regulations • How to access the library and the gym • Medical centre and dentist • Car and bike parking • Imperial Events • Cash points (most cafes and shops on campus are card only) and how to set up Yoyo for use in College outlets • Using Amazon lockers and their locations on campus • The Learning Guide - for online help with Microsoft Office Applications • Information systems security policies; Be secure IT security • Research Support - <i>for information and Research Services team support</i> • Leave dates 	
<p>Show and discuss:</p> <ul style="list-style-type: none"> • Refer to New Staff web pages • Emergency evacuation procedures (if on campus) • First aid facilities (if on campus) • Safety for working in labs (if relevant) • Computer health 	
<p>Introduce the buddy/mentoring system and introduce it to the designated person, if offered in your area</p>	
<p>How to join:</p> <ul style="list-style-type: none"> • the library • Move Imperial / other leisure facilities • new starters networking event • Imperial Icebreaker - an automated service that introduces people once a week and encourages them to set up a meeting to have a coffee and a chat and meet others working at the College • Societal engagement <p>Encourage them to keep up to date with College news, announcement, Staff Briefings, yammer</p>	
<p>Workplace and campus tour/virtual option</p> <ul style="list-style-type: none"> • local public transport • lost property 	

<ul style="list-style-type: none"> • medical centre / occupational health • common rooms • meeting rooms incl. how to book rooms • libraries • recreation facilities • shops • car/bicycle parking 	
Provide space to know the new team and integrate	
Local interests <ul style="list-style-type: none"> • cultural events - weekly concerts, etc • shopping, banking, eating, drinking, post office, chemist, supermarket, cash points, etc 	

5. First-month Induction

Line Manager Action	Completed
Check completion of Month one safety training	
Schedule time for completion of relevant Imperial Essentials training, as well as any local and role-specific, and monitor progress	
Check that they are signed up for the upcoming Imperial Insights virtual session and Induction session for managers (if your new starter has line management responsibilities)	
Continue discussing and clarifying: <ul style="list-style-type: none"> • their role and job description, • Mutual expectations, • SMART goals and objectives for the next six months • how performance will be reviewed • how do they contribute to the team/department/College • Imperial Expectations and Values and their role • Any further development • Importance of looking after their wellbeing 	
Have scheduled regular one to ones and catch-ups to review how they settle in, their role, objectives, the support they need, e.g. would they like a conversation with a staff disability adviser , if relevant	
Continue providing space to know the team and relevant key people; encourage connecting with diversity networks and staff networks ;	

6. First six months

Line Manager Action	Completed
Book probation review : mid (3 months in) and end of probation review (6 months in) for regular employment. Three years' probation for academic staff	
Completion of Risk Assessment Foundation Training (RAFT) for new managers and supervisors only	
Booked on/attended Unconscious bias training and recommend Active bystander training	
Meet regularly and invite questions; a helpful framework for one to ones: Objectives- Expectations-Development-Wellbeing-Feedback	

Address any issues as they arise in regular and ad hoc meetings – nothing should come as a surprise in your probation review meetings.	
Discuss any development needs and plan for relevant support, available budget, study leave	
Imperial Essentials completed by the end of 6 months	

7. Development Plan

Detail any local job-specific development and training at departmental or College level, including safety training. Also, book the new staff member onto "[Imperial Insights](#)", the College's induction session and [Induction for managers](#) (if your staff is a lone manager). Ensure to include the date in the relevant space of the development plan.

Date and Time	Type of development (e.g. job shadowing, workshop, self-directed learning, policy)	Where	Support
	Imperial Essentials		
	Imperial Insights		
	Induction session for line managers (if applicable)		
	PCI DSS Learning (if applicable) - to carry out financial transactions involving the acceptance of payment cards		
	Risk Assessment Foundation Training (RAFT) for new managers and supervisors only		

A complete list of courses is available on the [People and Organisational Development website](#)