

## Policy Document Control Page

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**Originator**

**Originated By: Claire Ingle and Chris Heath**

**Designation: HR Resourcing Manager and PMVA/CEST Manager**

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**Equality Relevance Assessment Undertaken by: Chris Heath**

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**Where policy deemed relevant to equality-**

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Policy to be uploaded to the Trust's External Website? YES

**Review**

Review Date: September 2016

Responsibility of: Claire Ingle

Designation: Resource Manager, HR

**An e-copy of this policy is sent to all wards and departments (Trust Policy Pack Holders) who are responsible for updating their policy packs as required.**

**This policy is to be disseminated to all relevant staff.**

**This policy must be posted on the Intranet.**

**Date Posted: 30<sup>th</sup> December 2013**

## Induction Policy

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# INDUCTION AT PENNINE CARE NHS FOUNDATION TRUST

## 1. INTRODUCTION

Pennine Care NHS Foundation Trust believes that timely induction is essential for all new employees of the Trust and is a vital part of staff recruitment, integration into the working environment and retention of staff. The Trust is committed to providing effective comprehensive induction arrangements for all staff.

The aim of the Induction Policy is to ensure that induction is dealt with in an organised, consistent manner to enable staff to be introduced into a new post and working environment quickly so they are able to contribute effectively as soon as possible.

The Trust expects that the implementation of a comprehensive induction approach will: -

- Ensure that all new employees, regardless of their role are focussed on good patient care utilising the Principles of Care developed by services users and staff
- Enable new employees to settle into the Trust quickly and become productive efficient members of staff within a short period of time
- Ensure that new entrants are motivated, feel valued and enjoy their induction period
- Ensure that employees operate in a safe environment and are aware of their legal, occupational, health and safety and patient safety responsibilities.
- Assist in reducing staff turnover and reduce costs associated with repeated recruitment.
- Ensure that clinical governance requirements are met and help reduce complaints
- Ensure staff are aware of and understand the Trust's aims, objectives and operational services
- Ensure individuals understand how their job fits into the Trust and the wider NHS
- Help staff understand how their job/department supports the Trust to achieve its objectives
- Meet the needs of individuals in regard to ensuring competent performance in their role.

### 1.1 Definition

Induction is a process of structured familiarisation with a job role that begins during recruitment and continues for a period of up to six months, during which time the employee progressively demonstrates increased skills and knowledge in the job role as their training and development needs are identified and met.

Induction has three distinct elements;

a) Pre-employment Induction Information;

b) Corporate Welcome – the first day of employment;

c) Local induction Procedure – lasting up until three months after the Corporate Welcome and the beginning of the annual individual performance, development and review cycle for the new staff member.

The Induction Process overview is in Appendix 1

## 2. AIM OF THE INDUCTION POLICY

The aim of this policy is to ensure that all new employees receive an induction programme appropriate to their needs. The Trust is committed to providing a programme that will meet both the individual's needs and the organisational objectives.

## 3. SCOPE

This procedure applies to all staff groups, regardless of grade or profession, employed by the Trust including part time staff, locums, volunteers, and those on fixed term and temporary contracts.

This procedure covers pre employment, corporate welcome programme or organisational arrangements for induction of new staff as well as local induction into specific work practices within the team or department within which the individual will work.

Induction periods will be flexible and will vary depending on the new starter's previous knowledge, their length of employment with Pennine Care and their new role. Induction content will also be reflective of a staff members' compliance with the Core Skills Passport/Register.

## 4. OBJECTIVES OF INDUCTION

The overall objectives of the induction period are that the new employees will:

- quickly feel part of their new environment
- understand what is expected of them
- understand corporate and local policies and procedures which govern and regulate the work they do
- be competent to use any equipment required to do their job
- have met with the staff with whom they will have a working relationship
- have agreed a personal development plan for their on-going development in their new role

These objectives will be achieved through three elements of induction:

- **pre employment information** to establish core skills compliance, provide written information about the organisation and services
- **corporate (or organisational) induction programme** that all staff will attend on their first day with the Trust
- **local induction** which is a tailored induction, delivered in the team or department the individual is based

## 5. INDUCTION ROLES & RESPONSIBILITIES

The roles and responsibilities identified below include all training.

**The Trust Chief Executive** has the duty and responsibility to ensure that suitable and sufficient resources are made available for the provision of and attendance at training events.

**The Executive Director of Operations** establishes the structure, resource deployment and continuous quality review of training to ensure training needs are being met through education activities to enable staff and services to deliver service objectives and high quality care to service users.

**The Director of People & Development** and the **Director of Organisational Learning and Development** will ensure the Resourcing Manager, the Organisational, Learning and Development Team and HR, where required, are resourced, structured and orientated to deliver the induction processes based on workforce recruitment information.

**Organisational, Learning and Development and Human Resources** will ensure that corporate welcome events are delivered to the agreed workforce recruitment information take place each year to meet the needs of recruitment and regular collaborative reviews (of a minimum of once every 2 years) of the welcome event take place:

**Service Managers** are responsible for ensuring all staff receive local induction and for completion of the local induction check list. The Service Manager should also ensure attendance at the Trust Corporate induction in liaison with Human Resources and the Training Department. Service managers through the recruitment process are responsible for identifying what core skills training a new starter will require and booking them onto appropriate training for completion within 3 months of starting work within the Trust.

**Educational Governance Group.** To review the content of both corporate and local induction through the Core and Essential Skills training subgroup and Human Resources

## 6. INDUCTION PROGRAMME

**6.1 Induction to the Trust** - All new permanent, volunteers and bank staff are required to receive a Trust Induction

### 6.2 Pre- Employment Induction Information and Procedures

Once all necessary pre-employment clearances have been received and authorised new starters will be booked on the next available induction and their new manager informed of their start date.

### 6.3 Trust Corporate Welcome

All new permanent starters, volunteers and bank staff with the Trust will receive a one day corporate welcome session that will introduce them to the Trust as an

organisation, its core business, principles of care and key information designed to orientate and identify their contribution to the organisation, this includes Executive Directors, medical staff and consultants.

A separate and specific Doctors in training Induction is provided. All Junior Doctors are required to attend. Attendance records are maintained and non-attendance will be followed up through a formal process involving the member of staff's line manager.

Students and professionals in training will be expected to undertake an agreed induction with their higher education/education body which may be supplemented where necessary with topics and programmes particular to Pennine Care. This will be identified and agreed by the practice education facilitators. Students will also have their core skills passports recognised to prevent repeat training. For all practice placements the students will receive a local induction to the service, department or ward as part of their placement.

As a minimum the content of the corporate welcome event will include:

- A Service Director/Executive Director Welcome & Overview of vision, values and core business
- Principles of Care – activities identifying new starters roles and responsibilities to ensure patients are at the centre of our activities. Developed by service users and staff in response to the Francis Report
- Customer Service Focus & Patient Stories led by the Patient Advice & Liaison Service
- Key Fire, health and safety information
- Opportunities to meet and discuss their role, expectations and responsibilities with other new starters and existing staff
- Equality and Diversity
- Key Child protection & safeguarding information
- Moving and Handling
- Provision of their staff identification badge
- Personal Safety
- Information Governance
- Accessing Training & Education Opportunities including what staff need to do
- Safeguarding adults
- Human Resources, Services and Policy Overview including temporary staffing arrangements & whistle-blowing/raising concerns
- Complaints

There is a focus on interactive, discussion and development activities to clearly introduce the principles of care framework, leadership and responsibilities to new starters as well elements of the NHSLA compliance requirements for induction

A full list of the NHSLA compliant induction is provided in Appendix 6. This does not have to be provided solely on the corporate welcome event and is introduced at the pre-employment stage and again in local induction procedures to provide context to the information provided in the new starters actual work setting.

#### 6.4 **Local Service Induction-** All new permanent, temporary, volunteers and bank staff

are required to undertake a local induction to the service / department in which they work either at commencement of employment or upon transfer to another service or department. Local Induction must be completed within three months of the employee taking up their post. (Appendices 1, 2 and 3)

Local Induction should be role specific as not all topics apply to all staff and should be carried out in conjunction with the member of staff's line manager. Monitoring is by means of the attached checklist which when completed and signed is retained in both the staff members personal file and with a copy returned to the Organisation Learning and Development Team.

Within the first three months of employment the line manager/supervisor will meet with the new employee to identify any training needs that may have been identified during selection or the induction process. A personal development plan should be agreed and this personal development plan should be developed to assist the individual achieve the expected level of competency.

A core training guide is produced and regularly reviewed. This guide identifies what training the new starter is required to do. These are sent out to both line manager and new starter by the Human Resources recruiting team on confirmation of employment acceptance as part of the pre employment induction information.

There is scope for adding other non defined issues into the checklists that may be specific only to that service. Volunteers' local induction will be tailored to fit the voluntary role they will be undertaking. This will be agreed with, and overseen by the Volunteer Co-ordinator who will report their monitoring to the Organisational Learning and Development Team.

Another recently appointed member might also be identified to act as a 'buddy' to the new starter in order to offer support over this period as they may have a greater appreciation of the concerns of the new joiner.

## **6.5 Bespoke Inductions**

In specific circumstances with agreement of senior managers a bespoke induction can be put in place for an individual or individuals. Where mass recruitment is taking place for a new service or unit an extended induction can be developed in consultation with Human Resources and Organisational Learning and Development.

## **7. SPECIFIC INDUCTION ARRANGEMENTS**

### **7.1 Staff Moving From Other Departments within the Trust**

When existing staff transfer between departments they will receive a local induction into the department and should complete a local induction checklist. Generally these staff will not need to attend the corporate induction programme. However, if an individual is appointed into a clinical role with patient contact, having not worked in this type of role previously, they should attend the corporate induction programme.

### **7.2 Bank, Agency Staff**

All Bank staff should attend corporate induction prior to placement with any area and receive a local induction in each placement area they work in.



All agency staff should receive a local induction with Pennine Care in each placement area they work in, but may not be required to attend corporate induction. Even if the agency member of staff has worked elsewhere in Pennine Care, a local induction should always take place.

Staff employed by an agency or through the bank for a single shift will complete a bank and agency local induction for that shift. (Appendix 4)

### **7.3 TUPED Staff and large scale staff migrations into the organisation as a result of new business and service harmonisation**

Where whole scale services and staff groups are joining the organisation but remaining in situ in terms of their day to day work tasks and service functions, it will not be necessary for those staff to undergo pre employment and local induction procedures. However as a minimum they should receive a welcome pack of information conveying the corporate welcome information and where identified Principles of care training activities facilitated by those involved in the service transfer

### **7.4 Contractor staff**

All contractor staff employed on-site should receive a comprehensive local induction. For contractor staff that work on a Pennine Care site on a regular or continuous basis it may be appropriate for these staff to also attend the corporate induction. The manager should liaise with Organisation, Learning and Development for guidance.

### **7.5 Short-term employment**

Staff employed on contracts of 3 months (or less), or on a locum arrangement will receive a detailed local induction. Due to the short notice or term of employment it is not appropriate for locum or short-term staff to attend corporate induction. The manager must ensure that the local induction is comprehensive and should liaise with OL&D for guidance.

### **7.6 Volunteer Induction**

All volunteers will undertake an induction programme, arranged by their volunteer 'co-ordinator', geared to particular/individual aspects of their role and placement area.

### **7.7 Staff who have previously worked at Pennine Care in the last 12 months.**

Staff who have left the organisation and are returning after a short break of 12 months or less generally do not need to attend corporate induction unless their mandatory training is out of date. In this case specific sessions only, e.g. fire, manual handling, Resuscitation, may be accessed.

For staff whose break is more than 12 months, they should attend the full corporate induction programme as well as receiving a local induction.

### **7.8 Existing staff returning to work at Pennine Care**

All staff returning to work after a career break, maternity leave or extended period of absence of no more than 12 months should receive a comprehensive local induction back into the department and training appropriate to their needs. Generally these staff do not need to attend corporate induction unless their

mandatory training is out of date. In this case specific sessions only, e.g. fire, manual handling, Resuscitation, may be accessed.

## **7.9 Breaks of over 12 months**

Staff, whose break, for whatever reason, is more than 12 months, should attend the full corporate induction programme as well as receiving a local induction.

### **7.9.1 Preceptorship**

All newly qualified clinicians, those changing their role or clinicians re-entering the profession after completing a recognised return to practice course, will have a preceptorship period. Preceptors will be clinicians, who have a minimum of twelve months experience within the same or an associated field as the person requiring support. A separate policy is available which details the requirements of preceptorship.

## **8. PROCESS FOR BOOKING STAFF ON CORPORATE INDUCTION**

**8.1** All new permanent staff are recruited through the centralised recruitment team. All new starters are provided joining instructions in writing by the centralised recruitment team which includes their start date in line with Corporate Induction dates. Central recruitment informs the Organisational Learning and Development department by email of names to produce the attendance register for the course.

**8.2** This process is mirrored for bank staff who are not permitted to take their first bank shift until they have attended Induction.

**8.3** A junior Doctor induction will be held four times a year. Lists of staff to attend will be provided by the Medical Education lead/Medical HR, to the Organisational Learning and Development for the attendance register. Staff will be sent written joining instructions by the Human Resources department.

## **9. MANAGING NON-ATTENDANCE AT CORPORATE AND NON COMPLETION OF LOCAL INDUCTION**

**9.1** Completion of corporate induction is mandatory including attendance at the Corporate welcome event as is the completion of local induction.

### **9.2 Corporate induction**

**9.2.1** Non attendance at Corporate induction will be identified through the attendance register. The names of staff booked and attending will be checked by the learning and development administration team and non attendees identified. In the first instance non attendance will be reported to the centralised recruitment team who will arrange for rebooking. Non attendance a second time will be reported to the line manager by the Organisational Learning and Development Department. Monthly reports will be provided to service managers for action. Records of attendance will be held by Organisational Learning and Development Department.

**9.2.2** Junior Doctors completion of the corporate induction will be identified through the attendance register by the Organisational Learning and Development department.

Non attendance will be informed to the Human Resources department who will re book the member of staff onto the general Trust Corporate Induction. Non attendance on a second occasion will be reported to the Medical Education Lead for further action.

### **9.3 Local induction**

- 9.3.1** Local induction checklists will be completed with the new member of staff and their line manager. The completion slip will be returned to the Organisational Learning and Development department by the line manager who completes the induction. These will then be recorded onto the Oracle Learning Management (OLM) system by the Organisational Learning and Development Team. Monthly reports identifying non completion will be generated by the Organisational Learning and Development Department and sent to the line manager by email with a deadline for completion. Non completion on a second occasion will be informed to the service line manager by email for action.
- 9.3.2** Local induction checklists for junior doctors will be returned to the Medical lead . Certificates of completion will be provided by Human Resources to the individual for their portfolio. Non completion of the checklist results in the junior doctor failing to complete their placement. Non completion will be informed to the Medical Education Lead for action.
- 9.3.3** Local induction records for bank, agency and locum staff will be returned by the line manager completing the specific induction checklist to the appropriate department. For Bank staff, apart from Administrative bank the checklist should be returned to the Central Temporary Staffing Department. For medical Locums and administrative Bank staff the checklist must be returned to Human Resources. Audits to check this happens will be run to ensure consistency.

## **10. MONITORING AND REVIEW**

- 10.1** This policy will be reviewed 3 yearly by the Human Resources, recruitment and resources manager. The content of induction programmes both corporate and local will be reviewed two yearly by the Educational Governance Group Training group.
- 10.2** Monitoring of compliance with attendance of permanent staff on corporate induction will be undertaken by the OL&D department. Line managers will be informed immediately and monthly reports will be provided to service line managers and quarterly reports to the Education Governance Group. Actions to address non compliance will be agreed by the Education Governance Group.
- 10.3** Monitoring of compliance of completion of local induction will be undertaken by the Organisational Learning and Development Department, the Central temporary staffing department and HR for junior medical staff. Monthly reports will be provided to service line managers and quarterly reports to the Education Governance Group. Actions to address non compliance will be agreed by the Education Governance Group.

- 10.4** For Bank, agency and locum staff a sample audit will be completed quarterly by the Central Temporary Staffing Department and Human Resources to identify any non completions. Where non compliance is identified the departments will be notified by the Central Temporary Staffing Department and Human Resources and action plans put in place with appropriate managers to address non compliance. Reports on compliance will be provided by the Central Temporary Staffing Department and Human Resources to the Education Governance Group following each audit.
- 10.5** All staff will be invited to complete an Induction Evaluation Form (Appendix 5) on completion of their Local Induction which should be no later than three months after taking up their appointment. This should be completed and returned to the Organisation, Learning and Development Team for evaluation. The results of the evaluation should be presented to the Board on an annual basis. Any common themes of concern should be acted upon immediately



## Appendix 1 Induction Process

Timescale	Activity	Content	Responsibility
Recruitment Stage	Pre Induction	Pre employment checks	HR
		Send orientation information, staff handbook and date of corporate induction to new starter prior to commencement of post	
		Assessment of prior learning (Skills Passport) Core Skill Guide & Course Booking by Manager	HR / Line Manager
Day One	Corporate Welcome	Corporate Welcome Health and Safety introduction HR, IT, governors, staff side, Occupational Health etc.	OL&D
Day Two	Local Induction	Local health and safety (e.g. emergency procedures, fire exits and alarms, ward based orientation where appropriate) Meet the team Working arrangements Bank arrangements where appropriate Overview of department and how role 'fits' into the team Signposting to health and safety policies e.g. Risk Management, Accident and Incident Reporting, Moving and Handling, MVA etc Information governance and communication Car parking arrangements	Line Manager
Within first week	Local Induction	Arrange mandatory training and familiarise with learning and development opportunities and processes Key HR processes e.g. pay, annual leave, attendance	Line Manager

		management etc.	
		Meet induction 'buddy'	
		Set dates for 1-1s etc.	
		Meet key colleagues, stakeholders etc.	
		Email, intranet, IT processes	



Within first month	Core Skills Training	As appropriate for role & passport accreditation	Line Manager (OL&D)
	Discuss personal objectives	Linked to job role, departmental and organisational objectives	Line Manager
		Signposting to organisational policies including HR (e.g. Respect at Work, Work Life Balance, Grievance etc.)	



Within first three months	Mandatory Training	Have completed all relevant mandatory training	Line Manager
		<b>Induction for Managers</b> if appropriate <sup>1</sup>	
		Access to coaching and mentoring if appropriate	



At 3 months	First iPDR	Agree personal objectives, personal development plan and review progress	Line Manager
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WELCOME TO THE PENNINE CARE NHS FOUNDATION TRUST

**This is your induction checklist which must be worked through with your manager (or designated person). Please ensure that when each section is completed it is countersigned by your manager (or designated person)**

# Local Induction Checklist

This document has been designed to provide guidance for individuals and their line managers, as to what needs to be completed within 3 months of joining Pennine Care NHS Foundation Trust.

For Bank and Temporary Staff, please use the Local Induction Checklist in the **HR34 Central Temporary Staffing Department (CTSD) Policy and Procedure V2** Appendix 5)

This form must be completed, signed by the new starter and their line manager and then returned to the Learning and Development Department at the address below. The new starter will not be registered as completing their induction until this form is completed, signed and returned.

Shaded items must be completed on the first shift at the employees work-base.

The sign off sheet, at the back of the document must be completed in full and faxed/sent to:-

**Organisational Learning & Development, Pennine Care NHS Foundation Trust  
Horton House, Southlink Business Park, Hamilton Street, Oldham OL4 1DE  
Fax Number: 0161 716 3466**

## New Starter Details

**Name:**

Telephone number

e-Mail address

**Line managers name:**

Telephone number

e-Mail address

**Date of Trust Corporate Welcome**

Version: MAY 2013



Core & Essential Skills Training (e-learning must be completed within three months of start date)	Date Completed	Signature of Individual and Date	Signature of Line Manager and Date
Equality and Diversity Awareness e-learning			
Information Governance e-learning			
Safeguarding Adults e-Learning			
Child Protection Awareness e-learning			
Fire Safety Awareness e-learning			
Health & Safety Awareness e-learning			
Appropriate Core Skills Framework Training Guide has been provided and Training Booked			
Structure of Department	Date Completed	Signature of individual and Date	Signature of Line Manager and Date
<b>Introduction to line manager and contact details</b>			
<b>Tour of department and staff facilities</b>			
Structure of department			
<b>Copy of Who's Who (Team)</b>			
Service Director and Senior management			
Department objectives			
The Job	Date Completed	Signature of individual and Date	Signature of Line Manager and Date
Identification pass ordered and received			
Access to computer (and NCRS/PARIS if applicable)			
SMART card ordered and received (if applicable)			
User name and password obtained			
<b>Any specific risk assessment to complete job role (Moving &amp; Handling, DSE, New/ Expectant Mother) (if applicable)</b>			
<b>Telephone and answer machines (including answering/message taking protocols explained)</b>			
Location of fax machine, printer and photocopier			
Admin support e.g. post, room bookings			
Standards of Business Conduct Policy			
Copy of Job Description			
Copy of Post Outline/KSF Profile completed			
Introduction to appraisal process and date agreed for objective setting (within 3 months)			
Knowledge Management Service			
Working Hours	Date Completed	Signature of individual and Date	Signature of Line Manager and Date
<b>Start and finish times</b>			
<b>Working time regulations and breaks</b>			
<b>Shift systems (if applicable)</b>			
Flexible working			
Timesheets			
Annual leave policy and holiday requests			

Other forms of leave (e.g. special)			
Payment	Date Completed	Signature of individual and Date	Signature of Line Manager and Date
Pay date and method			
Travel expenses and extra duty claims			
Sickness/Absence	Date Completed	Signature of individual and Date	Signature of Line Manager and Date
<b>Absence reporting</b>			
<b>Prior notice for appointments</b>			
Role of occupational health and counselling (and contacts)			
Managing Attendance policy			
Corporate Governance	Date Completed	Signature of individual and Date	Signature of Line Manager and Date
Finance responsibilities			
Gifts/Standards of business conduct			
<b>Personal and patient property</b>			
Ordering procedures (if applicable)			
<b>Current risk issues e.g. action plans and learning lessons</b>			
Complaints/compliments and comments			
Freedom of Information and Access to Record requests			
Raising Concerns at Work Policy			
Press/media enquiries			
<b>Business Continuity Plans (How to access them in department)</b>			
Communication	Date Completed	Signature of individual and Date	Signature of Line Manager and Date
Newsletter			
Team Brief			
Trade union membership			
Staff Side arrangements			
Upcoming briefing/staff engagement events			
Personal	Date Completed	Signature of individual and Date	Signature of Line Manager and Date
<b>Business attire (dress/uniform) and cleanliness</b>			
<b>Hazards from hair/jewellery/uniform</b>			
First Aid	Date Completed	Signature of individual and Date	Signature of Line Manager and Date
<b>Department first aiders</b>			
<b>Location and use of first aid boxes</b>			
<b>Location of Resuscitation and Emergency Equipment including Ligature Knife (if Applicable)</b>			
<b>Door Codes/Keys/Access and Egress</b>			
Fire Safety and Evacuation	Date Completed	Signature of individual and Date	Signature of Line Manager and Date

<b>Evacuation procedures</b>			
<b>Location of fire exits</b>			
<b>Alarms and drills</b>			
<b>Location of fire extinguishers</b>			
<b>Responsibility for patients</b>			
<b>Policies and Procedures</b>	<b>Date Completed</b>	<b>Signature of individual and Date</b>	<b>Signature of Line Manager and Date</b>
<b>Observation &amp; Engagement Policy, Practice and Documentation (if Applicable – Ward Based)</b>			
<b>Health and safety notice board incl. "What you should know..." poster</b>			
<b>Location of Health and Safety file location and contents</b>			
Location of HR policies on intranet/hard copy			
Location of clinical policies on intranet/hard copy			
Location of corporate policies on intranet/hard copy			
Local policies/procedures			
Current local initiatives e.g. Productive wards/developments			

**Trust Induction  
 Completion and Sign-Off Sheet**

The Trust Induction process has been achieved when the following elements have been completed and signed off by the new starter and the line manager

New Starter Details	
<b>Name: (BLOCK CAPITAL LETTERS))</b>	
Telephone number	
e-Mail address	
<b>Line managers name:</b>	
Telephone number	
e-Mail address	

	Date Completed	New starter Signature	Line Manager Signature
1) Pre Employment Information Pack Received			
2) Attendance at the Trust Corporate Welcome Event			
3) Completion of the Local Induction Checklist			

Additionally, a date must be set for the first IPDR meeting, before the induction process is completed and registered on the Trusts Learning management System and Organisational Compliance, Board Report.

4) The date for my first IPDR is	
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Please complete the New Starter Details and items 1 to 4 above. When signed off by both new starter and the line manager, fax/send to

Learning & Development, Horton House, Southlink Business Park, Hamilton Street,  
 Oldham O14 1DE **Fax: 0161 7162802**

**This should be completed and returned to Learning & Development  
 within 3 months of starting in employment**

### Appendix 3

#### Local Induction Record for Consultant Medical Staff

Name:  
Medical Manager:

Department:  
Borough:

<b>Corporate Trust Induction</b>	Date completed	Signature of employee	Signature of manager
• Attendance at Acute Trust Induction			
• Either 1 day medical induction in Feb / Aug, or monthly Trust Induction for all new employees)			
• Booked on to MVA/Breakaway course			
• Booked on to BLS course			
• Booked on fire lecture			
• Trust policies – on intranet			
<b>Borough Induction</b>	Date completed	Signature of employee	Signature of manager
• Local Handbook (if one exists)			
• Bleeps/telephones			
• Library access/ IT			
• ID badges			
• Maps			
• Catering			
• Medical staff web page on trust intranet			
• IT (plus new user forms & internet policy)			
• Bloods/test results			
• Incident reporting			

• Pharmacy/prescriptions			
• Rotas/cover			
• On-call and common on-call issues			
• Junior cover at night			
• Bed management policy			
• ECT arrangements			
• Local training timetable and expectations of trainees.			
• MHA arrangements			
• Wards (inc PICU, seclusion)			
• General Adult			
• A&E liaison			
• Social Services			
• AOTs			
• Rehabilitation			
• Crisis services			
• CMHTs			
• Early Intervention			
• CAMHs			
• Old Age			
• Drugs & Alcohol			
• Learning Disability			
<b>Departmental Induction</b>	<b>Date completed</b>	<b>Signature of employee</b>	<b>Signature of manager</b>
• Orientation (with tour), including offices, IT access, refreshments, meet personnel, locate equipment, case notes etc			
• MDT and roles (who is who, and who does what)			
• Dept. protocols			
• Safety equipment, policies, and protocols			
• Fire exits/alarms/equipment and drill			
• Car Parking			
• Record Keeping			
• Physical examinations/tests			

• Timetable to meet Management personnel –			
• Timetable to meet other key personnel (PCT leads, College Tutors, Local Clinical Tutor)			
• Job Plan			
• PDP / Objectives			
• Appraisal			
• Audit/research			
• Meetings			
• Management opportunities			
• Leave Arrangements			
• Duties of educational supervisor			
• Secretarial support and cover arrangements			
• Mentoring schemes			
•			
•			
•			
•			
•			
•			
•			
•			
•			

Distribution: HR for personal file

**SIGN OFF INDUCTION FORM**

**Name of Employee:** \_\_\_\_\_

**Department:** \_\_\_\_\_

**Borough:** \_\_\_\_\_

**Start Date** \_\_\_\_\_

**Checklist Completed**

YES NO

**Induction Evaluated**

YES please attach Evaluation Form

NO Please state why

**Signature of Employee** \_\_\_\_\_

**Signature of Manager** \_\_\_\_\_

**Date of Induction sign off**

**Please return to the Organisational Learning and Development Department within 3 months of joining the Trust.**





<b>Corporate Trust-wide Induction</b>	<b>Date induction received</b>	<b>Signature of trainee</b>	<b>How relevant/useful is this topic?</b>
<b>Attended Pennine Care Trust-wide induction within last 2 yrs therefore not a requirement this time</b>			
<b>Trust Induction this time (if attended):</b>			
Equality and Diversity			
Infection Control			
Fire, Health and Safety			
Personal Safety/Mind's eye video			
Trainees in difficulty			
Risk, Incident reporting Investigation and Management			
Safeguarding Adults			
Child Protection			
Health Records			
Information Governance /confidentiality			
Medicines Management issues and Core Competency Assessment			
Human Resources (leave / monitoring / pay / bullying and harassment policy / occupational health			
Mental Health Act Policies			
Complaints			
<b>Yearly Mandatory Training</b>	<b>Date of training</b>	<b>Signature of trainee</b>	
MVA/Breakaway course (must show evidence that training up-to-date)			
If training required Booked on: Yes / No    Date:			
BLS course (must show evidence that training up-to-date)			
If training required Booked on: Yes / No    Date:			

Borough Induction	Date induction received	Signature of trainee	How relevant/useful is this topic?
Local Handbook(hard copy/on-line)			
Bleeps/telephones			
Library access/ IT			
ID badges			
Maps			
Site tour (including A &E)			
Catering			
Accommodation			
IT (plus new user forms)			
Bloods/test results/forms			
Breaks – 20mins every 4hrs must be taken			
Rotas/cover			
On-call and common on-call issues			
Handover arrangements			
Support at night / senior cover			
Bed management			
Medicines Management <ul style="list-style-type: none"> <li>Local pharmacy procedures/prescribing</li> <li>Rapid tranquillisation</li> </ul>			
Safety / lone working policy / personal alarms			
Local fire alarm and drill, location of fire hydrants etc			
Accident / incident reporting			
ECT			
Local Education Programme timetable, and expectations of trainee			
Psychotherapy training programme			
Basic Skills Training (for new CT1/FT/GP trainees only ) <ul style="list-style-type: none"> <li>History taking &amp; Mental State Examination</li> <li>Mental Health Act</li> <li>Capacity and consent</li> <li>Assessment of DSH/suicide risk</li> <li>Prescribing and rapid tranquillisation</li> <li>Managing psychiatric emergencies</li> <li>Risk assessment</li> </ul>			

Description/introduction to Local Services			
• Wards (inc PICU, HDU, seclusion)			
• General Adult services			
• A&E liaison/ Access & Crisis services			
• Old Age			
• AOT/ Early Intervention/ CMHT's			
• CAMHS/LD			
• SMS			

Post / Team Induction	Date induction received	Signature of trainee	How relevant /useful is this topic?
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Orientation (with tour), including offices, IT access, meet personnel, locate equipment, casenotes etc			
Secretarial support			
Timetable including supervision, educational programme, ward rounds, clinics			
MDT and doctor's role (who is who, and who does what)			
Reinforce mandatory breaks – 20mins must be taken every 4hrs			
Dept. protocols			
Record Keeping/ discharge summaries/ letter writing			
Physical examinations/tests			
<b>Educational supervisor</b>			
<ul style="list-style-type: none"> <li>• Induction meeting - learning agreement / PDP with educational objectives</li> </ul>			
<ul style="list-style-type: none"> <li>• E – Portfolio</li> </ul>			
<ul style="list-style-type: none"> <li>• Review previous Educational Objectives/ARCP outcome</li> </ul>			
<ul style="list-style-type: none"> <li>• Audit/research</li> </ul>			
<ul style="list-style-type: none"> <li>• Annual and study Leave</li> </ul>			
<ul style="list-style-type: none"> <li>• Medicines Management Core Competency Self Assessment discussed</li> </ul>			
Contact information			
Consultant			
Secretary			
Others			

Declarations of Competence		
CT1 trainees only	I have a fully completed and validated certificate of FY2 competence or equivalent	Trainee signature
Other trainees	My most recent ARCP certificate states that I am competent for my stage of training (Outcome 1) or that any Outcome 2 learning needs have been discussed with my clinical supervisor (GP /FY trainees/ Specialty grade/Trust grade doctors to similarly confirm competency for their stage of training)	Trainee signature
<b>Record of Medicines Management Core Competencies</b>	I have completed a self assessment of my medicines management competencies. I can evidence achievement of safe prescribing competencies	Trainee signature
Trainer Declaration	I have seen this trainees portfolio and I am satisfied that this trainee is competent to carry out routine clinical care, under supervision as part of a structured training programme	Trainer signature

I confirm this trainee has completed all required parts of Induction

Signed..... (Trainer/Supervisor)

Return to Medical HR, Pennine Care Foundation Trust HQ, 225 Old Street, Ashton-under-Lyne, OL6 7SR within the month of your start date

Retain a copy for your own portfolio

Failure to return this document may lead to disciplinary action

## Overall Evaluation Form

Your views regarding induction and this checklist are very important to us. You are best placed to let us know if the Induction has been useful to you and helped your induction into the Trust. If you have any further comments please add them here.

Please feel free to detach this sheet and send anonymously if you prefer

## Appendix 5

### Hello and Welcome to the Trust!

#### Bank / Agency/ Locum Local Induction Checklist

This form should be completed on arrival to the area the Bank / Agency/ Locum member of staff has been appointed to undertake work. This must form part of their induction.

Name \_\_\_\_\_

Date \_\_\_\_\_

Area Covered	Date & Comments	√ ('x' if not applicable)
Area Layout and Fire Exits		
Emergency Phone Numbers <ul style="list-style-type: none"> <li>• Resuscitation Team</li> <li>• Fire</li> </ul>		
Bleep System <ul style="list-style-type: none"> <li>• Doctors</li> <li>• Emergency</li> </ul>		
Alarm System <ul style="list-style-type: none"> <li>• Fire</li> <li>• Ward Alarms</li> <li>• Personal Alarms</li> </ul>		
Confidentiality		
Security		
Observation Terms		
Finding Places (please indicate those appropriate) <ol style="list-style-type: none"> <li>1</li> <li>2</li> <li>3</li> <li>4</li> <li>5</li> </ol>		
Please indicate other post specific information given: <ol style="list-style-type: none"> <li>1</li> <li>2</li> <li>3</li> </ol>		

**Once completed, this form should be signed by the Trust member of staff providing the Induction, and the Bank / Agency member of staff.**

Trust member of staff \_\_\_\_\_ Date \_\_\_\_\_

Bank / Agency member of staff \_\_\_\_\_ Date \_\_\_\_\_

**This form should now be returned to the either Human Resources (medical locums) or Central Temporary Staffing Department (all other staff)**



**Appendix 6**

**INDUCTION EVALUATION FORM**

This form is designed to gather **your views** on how effective your induction has been. We would be grateful if you could complete this form and return it to the Education Centre. This information will be treated in the strictest confidence and will only be used for the purposes of improving induction in the Trust.

**Name** \_\_\_\_\_

**Designation**  
\_\_\_\_\_

**Department**  
\_\_\_\_\_

**Borough/Trust Headquarters**

Please tick the relevant box and provide further information as requested.

**Organisational**

1. Do you feel that you have a basic understanding of the role of the Trust?  
YES NO

2 Did you meet the relevant key people within your organisation?  
YES NO

3. Did you feel that the role that you are to undertake within the organisation was clearly explained to you?  
YES NO

If "No", please provide further information:

**Please provide further information**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4a. did you receive an Induction Pack?  
YES NO

4b. Was the information presented in the Induction Pack clear and understandable?  
YES NO

5a. What date did you attend the Corporate Induction Day?

5b. Was the information on the Corporate Induction Day relevant?  
YES NO

If "No", please provide further information:

6a. Did you receive departmental induction?

YES NO

6b. Was the information provided in the departmental induction adequate?

YES NO

If "No", please provide further information:

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7. Did you receive adequate information on the following?

Your organisation (the Trust)

YES NO

Health & Safety

YES NO

Policies and Procedures

YES NO

Terms and Conditions of Service

YES NO

8. What aspect of the induction programme do you feel benefited you the most and why?

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9. What areas could be developed or improved within the induction programme?

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10. Any additional comments.

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Please return this form to the;

**Resourcing Manager**

**Human Resources  
Pennine Care NHS Foundation Trust  
Trust HQ  
225 Old Street  
Ashton Under Lyne  
OL6 7SR**

**Thank you for completing this questionnaire.**

