**Pre-Employment Checklist**

**Section 1: Checklist for line manager/supervisor**

The purpose of the pre-employment checklist is to help managers/supervisors prepare for the arrival of their new employee. This stage ensures the employee receives all the necessary and useful information required prior to their first day of work. The sample welcome email to new employees is in Section 2 of this document.

For further guidance on the preboarding and onboarding tasks allocated to new staff and managers via People and Money please review the [Guide to Recruitment and Onboarding.](https://www.ed.ac.uk/staff/services-support/hr-and-finance/people-and-money-system/people-and-money-user-guides)

You do not need to forward the completed pre-employment checklist to the HR team.

|  |  |
| --- | --- |
| **Name of employee** |  |
| **Employee number** |  |
| **Start date** |  |
| **Line manager** |  |
| **School/Department** |  |

|  |  |
| --- | --- |
| **1. Contact new start (either in writing or verbally) and include:** | **Completed?** |
| Confirmation of start date and normal working hours |  |
| Start time on first day (if different) |  |
| Name of person to report to (if not usual manager/supervisor) |  |
| Where and how to report (if using digital tools to induct) |  |
| What to wear |  |
| Confirmation of any reasonable adjustments required, if any. |  |
| Location plan or directions to workplace |  |
| Parking/public transport information |  |
| Reminder to bring any outstanding documents on their first day  (if not already provided during recruitment) |  |
| Check the employee has completed the People and Money preboarding tasks. In particular check that the new start has received their contract and signed and uploaded this to people and money. Further guidance is available within the [Guide to Recruitment and Onboarding](https://www.ed.ac.uk/staff/services-support/hr-and-finance/people-and-money-system/people-and-money-user-guides). |  |
| Any other relevant information that could be useful to the new start  (organisation chart, strategy documents) |  |
| **2. Workplace Arrangements:** |  |
| Ensure their workstation is prepared and equipped (desk, chair, PC, telephone, stationery, any reasonable adjustments etc. are in place) |  |
| Arrange access to IT systems (accounts, login details, staff email etc.) via your local  Computer Rep |  |
| If the new start is required to use People and Money as part of their role, (e.g. School/  Department Administrator, Timekeeper or Finance Manager) please request the appropriate  access by completing the [People and Money Access Form](https://www.ed.ac.uk/human-resources/a-to-z-of-forms). |  |
| Arrange building access |  |
| Identify a ‘buddy’ to assist new employee to settle in |  |
| Plan induction programme |  |
| Ensure colleagues and department are aware of new employee starting |  |

**Section 2: Welcome email template**

**From:** << Line Manager >>

**Title:** << Welcome to **[department],** preparations for your upcoming employment as **[post]**>>

Dear **[insert employee’s name]**

We are delighted you will be joining us on **[insert start date]** and look forward to welcoming you to the **[insert department name]** at the University of Edinburgh.

On your first day, please report to **[insert location]**, at **[insert time]** and ask for **[insert person].**

Your standard working hours will be **[insert working hours and pattern/rota].** The dress code for our department and the nature of this role is **[insert as appropriate for role/department]**.

**[Confirm if any reasonable adjustments have been made]**

Below you will find some useful information to help you get settled in:

* A campus map and/or directions to **[insert location]**
* Your job description **[attach job description]**
* A copy of the organisation chart **[insert organisation chart]**
* An outline of the Induction Programme that I hope will help you to settle in as soon as possible. This programme will provide you with the key information that you will need about the school, the University and your new role here. Everyone in the department was new at some point, so be assured we will all try to help orientate you over the next few weeks. **[insert Induction Plan]**
* A staff handbook if applicable or any other relevant local area information **[insert staff handbook]**
* University of Edinburgh Induction Website - [www.ed.ac.uk/human-resources/learning-development/on-boarding](http://www.ed.ac.uk/human-resources/learning-development/on-boarding)

I will carry out an induction with you on your first day. The aim of the induction is to provide you with key information about; the job and workplace, health and safety/fire safety matters, as well as to identify any relevant support and development needs with you.

By now you should have received your contract pack. Please ensure you have signed your contract (and any other relevant contract inserts) and returned it to the correct location as previously advised.

If you would like to discuss any additional reasonable support you may require please contact me.

In the meantime, if you any further questions please do not hesitate to get in touch.

Kind regards,

**<< Line Manager >>**