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|  | Departmental Induction Checklist Permanent/Fixed TermProfessional & Academic Staff |

Download and save a copy of this checklist. Complete a separate one for each new staff member.

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| **Name of Staff Member:** | **Start Date:** |
| **Position Title:** | **Department:** |

| **Pre-Start Preparations** | **Process/Support** | **Who** | **When** | **Status** |
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| Discuss checklist with administrative support and work out task allocation. |  | Hiring Manager | At verbal offer |  |
| Submit an ITSS request for help with “a staff movement request”.  This covers hardware, shared drives, mailboxes.  Username can be provided later. | [ITSS support request form](https://ask.otago.ac.nz/itsssupportrequest/) | Admin | At verbal offer |  |
| Send initial welcome email to new employee   * Include link to onboarding site for new employees. * Confirm accessibility/health and safety requirements * Include department contacts and organisation chart * Provide contact name if questions before first day * Include link to Our People section on department website   NOTE: if role requires cell phone, determine phone type (android/iPhone) now. |  | Hiring Manager | At offer acceptance |  |
| Schedule key meetings / inductions required for first week of employment (Health & Safety, morning tea)  [*What are DHSOs/DHSAs?*](https://www.otago.ac.nz/health-safety/management/dhsos/index.html) | [List of DHSOs/DHSAs](https://otagouni.sharepoint.com/sites/OnboardingNewStaff/Lists/DHSO%20and%20DHSA%20list/AllItems.aspx) | Hiring Manager/ Admin | At offer acceptance |  |
| Assign a mentor or buddy, if relevant. |  | Hiring Manager | At offer acceptance |  |
| Make necessary accessibility or health and safety arrangements with Occupational Health, if relevant.  (Confirm requirements with new staff member.) | [Occupational Health](https://www.otago.ac.nz/health-safety/occupational-health/) | Hiring Manager/ Admin | At offer acceptance |  |
| Organise business cards, door and department signage, if relevant. | [Painting & Signage](https://www.otago.ac.nz/propertyservices/services/contracting/otago072483.html)  [Business Cards](https://www.otago.ac.nz/uniprint/offer/stationery/) | Admin | At offer acceptance |  |
| Organise any equipment or protective clothing that may be required |  | Hiring Manager/ Admin | At offer acceptance |  |
| Organise any materials or stationery that may be required  ***Wellington***  Check Stationery store in Dept and level F - email Bevan Leevers if new or something special – bevan.leevers@otago.ac.nz |  | Admin | At offer acceptance |  |
| Arrange access to University of Otago systems as needed.  *Search for the new employee in MS Teams or Outlook to confirm username has been created.*  (FinanceOne access requires training.)  ***Wellington***  MedMoodle  Email to: eu.elearning.uow@otago.ac.nz  MedMoodle: <https://medschool.otago.ac.nz/>  HSMoodle: <https://hsmoodle.otago.ac.nz/>  Request access to OurDrive if entitled to CEL/CME [Conference Leave](https://ourdrive.otago.ac.nz/teams/UniversityofOtagoWellington/Lists/ConferenceLeave/By%20Status.aspx) | Blackboard, Moodle, Sojourn: [ask@otago.ac.nz](mailto:ask@otago.ac.nz)  More info/access:  [Business Objects](https://ask.otago.ac.nz/knowledgebase/article/KA-10002082/en-us) [eVision](https://ask.otago.ac.nz/knowledgebase/article/KA-10002222/en-us)  [FinanceOne](https://www.otago.ac.nz/its/services/software/otago041869.html)  [OURDrive](https://ask.otago.ac.nz/service-details/?id=0bb698d3-1bbd-eb11-bacc-002248151b49)  [SONIA](https://www.otago.ac.nz/its/services/software/otago726808.html) | Hiring Manager/ Admin | As soon as username is in system |  |
| Purchase licenced software as needed. (Some software is already provided - see link for details.) | [Software Procurement and Licensing](https://ask.otago.ac.nz/knowledgebase/article/KA-10003602/en-us) | Hiring Manager/ Admin | As soon as username is in system |  |
| Organise the workplace, building access, desk setup & phone  (Dental School Dunedin, St. David II and Clocktower use Cisco phones) | [Cell phones](https://www.otago.ac.nz/its/services/telephones/otago025870.html)  [Desk phones](https://www.otago.ac.nz/its/services/telephones/otago022886.html)  [Door access](https://www.otago.ac.nz/proctor/otherservices/otago025149.html) | Admin | As soon as username is in system |  |
| Organise any training required immediately after start, if needed. | [Training](https://www.otago.ac.nz/administration/stafftraining/) | Hiring Manager/ Admin | As soon as username is in system |  |
| Organise financial delegations if needed | [Financial Delegations](https://www.otago.ac.nz/financialservices/reference/delegation) | Hiring Manager/ Admin | As soon as username is in system |  |
| Request update of contacts/org chart on website.  Include name and address of your area and the info to add. |  | Admin | One week prior to start date |  |
| Send welcome email with logistics for first day   * Provide dress code information * Parking information * Bring photo ID for ID Card * Provide schedule for first day appointments * Provide information on where to go, what time and who to ask for |  | Hiring Manager | One week prior to start date |  |
| Add to local ‘Teams’ sites and/or custom email distribution lists  ***Christchurch***  Add to All-Staff Chch email list. For Client Services, add to UOC Administrators, Portfolio 2, Client Services Information Teams, SONIA.  ***Wellington***  Add to custom email distribution lists and appropriate moodle page. For CSA add to Green Team |  | Site/list owner | Day prior to start date |  |
| Update online phonebook | [Update online phone book](https://www.otago.ac.nz/its/services/telephones/otago022889.html) | Admin | Day prior to start date |  |
| Advise other staff of new employee |  | Hiring Manager | Day prior to start date |  |

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| **First Day/Week  Introduction to the Department** | **Process/Support** | **Who** | **When** | **Status** |
| Welcome to the Department |  | Hiring Manager | First day |  |
| Introduce to Head of Department/Senior staff/Colleagues |  | Hiring Manager | First day |  |
| Familiarisation with location of place of work and support facilities such as toilets, tea and coffee making facilities. |  | Hiring Manager/ Admin /Buddy | First day |  |
| Brief description of Department/ Division |  | Hiring Manager | First day |  |
| Obtain ID card obtained and any building/room keys  Tour campus/building pointing out key locations & services | [New ID Card](https://au.promapp.com/otago/Process/Minimode/Permalink/FuSWVe9F07HJAJleQgYXBX) | Hiring Manager/ Admin | First day |  |
| Explain building security access and procedures (if relevant) |  | Hiring Manager/ Admin | First day/week |  |
| Request familiarisation with relevant policies and policy library | [Policy Library](https://www.otago.ac.nz/administration/policies/) | Hiring Manager | First day/week |  |
| Direct to telephone features (if relevant)  (Dental School Dunedin, St. David II and Clocktower use Cisco phones) | [Cisco Phones](https://ask.otago.ac.nz/knowledgebase/article/KA-10002427/en-us)  [Desk Phone Options](https://ask.otago.ac.nz/knowledgebase/article/KA-10002061/en-us) | Hiring Manager/ Admin | First day/week |  |
| Introduce to the Kaiāwhina Māori and relevant policies (if relevant) | [Kaiāwhina Māori](https://www.otago.ac.nz/maori/contacts/for-staff/kaiawhina-maori/) | Hiring Manager | First day/week |  |
| Introduce to departmental mentor or buddy (if relevant) |  | Hiring Manager | First day |  |
| Run Health & Safety induction  ***Wellington***  Jane Anderson – Health and Safety Advisor, Jane.anderson@otago.ac.nz | [List of DHSOs/DHSAs](https://otagouni.sharepoint.com/:l:/s/OnboardingNewStaff/FHV-B6L6JgVKpfzVIUdstzEBiBHnslBsa-T4UYw0yfdERg?e=2BRpAm) | DHSO/DHSA | First day/week |  |
| End of day catch-up   * Answer any questions the staff member might have * Outline plan for next day and rest of the week |  | Hiring Manager/New Employee | First day |  |

| **First day/week or second week Introduction to the Job** | **Process/Support** | **Who** | **When** | **Status** |
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| Clarify job description and explain key outcomes |  | Hiring Manager | First day |  |
| Issue Personal Protective Equipment (PPE), as necessary |  | Admin | First day |  |
| Show employee Email Signature Generator | [Email Signature Generator](https://www.otago.ac.nz/webservices/forms/email-signature-generator/) | Admin | First week |  |
| Set staff development goals for period until next PDR (Performance and Development Review) |  | Hiring Manager | First two weeks |  |
| Organise training schedule including review meetings and progress towards PDR goals | [Training](https://www.otago.ac.nz/administration/stafftraining/) | Hiring Manager | Following PDR Goals Setting |  |

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| **First week  Conditions of Service Information** | **Process/Support** | **Who** | **When** | **Status** |
| Clarify work conditions   * Hours of work, lunch, and tea breaks * Absence, lateness (who to notify) * Overtime/shift arrangements (if any) * Holiday entitlements (procedures for applying for leave), Christmas shutdown * Sickness (Entitlements, who to notify, by when, where to send certificates) | [Leave Information](https://www.otago.ac.nz/humanresources/working-at-otago/leave-and-holidays/index.html) | Hiring Manager | First day/week |  |
| Direct to online training for Web Kiosk  (For new hires managing staff, contact [hrsystems@otago.ac.nz](mailto:hrsystems@otago.ac.nz) )  Request new employee complete equity details in Home -> EEO menu. | [Web Kiosk](https://concept.otago.ac.nz/ords/hrms/f?p=110:101::::::)  [Web Kiosk](https://blogs.otago.ac.nz/trainingswk/) online training | Admin | First week |  |

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| **Financial Responsibilities (if applicable)** | **Process/Support** | **Who** | **When** | **Status** |
| Complete relevant forms for financial responsibilities and arrange training | [Finance Forms](https://www.otago.ac.nz/financialservices/resources/forms/index.html)  [Financial Training](https://www.otago.ac.nz/financialservices/resources/training/) | Hiring Manager/Admin | First month |  |

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| **Academic Staff Confirmation Path  (If applicable)** | **Process/Support** | **Who** | **When** | **Status** |
| Advise new employee to contact the relevant areas for an appointment as noted in the email template. (Edit email as necessary). |  | Hiring Manager | First month |  |