

Local Induction and Initial Objectives

New starter appraisal requirements

To be completed within 28 days of start of employment

If the new staff member is employed under Agenda for Change (AfC) terms and conditions and their first day working in the Trust falls between 1st Jan and 30th Jun then this Local Induction and Objectives form will count as the employee's first appraisal in that year. If the new staff member starts in the Trust between 1st Jul and 31st Dec then they will require a full appraisal at the next appraisal season in the following year. If the new member of staff is not employed on AfC terms then only pages 1 to 3 are to be completed.

This local induction can be completed and recorded within the [Training Interface](#). The benefits to you by using the system are:

- When the induction is completed through the system there is no requirement to email Organisational Learning.
- Objectives set with the individual at the point of induction will automatically appear on your staff member's appraisal the following year.
- There is an electronic record of the Local Induction which reduces paper wastage.

Personal details

Staff member's name: <input type="text"/>		
Manager's name: <input type="text"/>		
Pay band: <input type="text"/>	Increment date: <input type="text"/>	CSU: <input type="text"/>
Job role: <input type="text"/>	Staff group: <input type="text"/>	
Number of months to annual appraisal (appraisals take place April to June): <input type="text"/>		
Date of local induction meeting: <input type="text"/>		

To submit comments or suggestions about this form, [please click here](#).



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Local Induction

The Local Induction Checklist is designed to support new starters at the Leeds Teaching Hospitals. We need to ensure all new starters receive a comprehensive induction that takes account of recognised standards and is relevant to their workplace and their role.

A Local Induction must be completed within the first four weeks of employment and before new starters are allowed to work unsupervised.

Areas to be covered in Local Induction	Yes ✓	No ✗
Orientation		
Orientation to hospital site, ward/department and any areas within the Trust relevant to post		
Introduction to Supervisors, Multi-Disciplinary Team (MDT) members, Peers, Mentors and key individuals within the service area		
Aims, objectives and purpose of the service		
Function and structure of the ward/department		
Specific duties and responsibilities of the post		
Who the individual reports to and where to raise concerns		
Who reports into the individual and who they will be responsible for appraising		
Set up the Appraisee/Appraiser relationship within the Training Interface appraisal system - click here for video help  . Appraisee must approve this assignment through their own Training Interface.		
Understanding the appraisal process, and who will be doing their first appraisal - click here for guidance on AfC appraisal 		
Identify any learning and development needs of the staff member, to include: <ul style="list-style-type: none"> • How to register and access the training via ESR - click here for guide  • How to register on the Training Interface to complete mandatory training and appraisals - click here  		
Hours of work and shift patterns (where applicable)		
Personal safety and lone working arrangements		
Where CSUs are using Self-Service to request Annual Leave, the manager will discuss this with the employee <ul style="list-style-type: none"> • <i>If you need help and support using Employee Self-Service, please email: leedsth-tr.ESRSelfService@nhs.net and a member of the team will contact you</i> You can also visit our dedicated ESR Self-Service intranet site - click here 		
Arrangements for the staff member's own support and supervision in accordance with the requirements of their own professional body		
The Leeds Way values and behaviours expected of staff, including awareness of the Dress Policy and the Smoking Control Policy		
An orientation to the systems, culture and terminology of the health and or social care sectors in England, where the staff member has been recruited from outside the UK		
Our Patients		
Information about patients, their care and communication needs		
Rights of people who use the service		
Ensure awareness of procedures relating to overseas visitors - click here 		

Continues over

Areas to be covered in Local Induction	Yes ✓	No ✗
Local Procedures		
Action to be taken in an emergency		
Be familiar with and know the location of fire action cards, evacuation drawings, sounds of fire alarm, fire repeater panel, assembly point if applicable (non-clinical areas)		
Explain resuscitation - local procedure - click here ↗		
Key documents used within the ward/department, including care pathways, patient records, risk assessments and observation charts		
Training requirements for key equipment and medical devices used within the ward/department		
How to report adverse events, incidents, errors and near misses, including where the service falls below essential standards of quality and safety		
Policy, Training and IT		
Policies and procedures of the organisation and service (see Appendix 1 for suggested list)		
Staff member has completed their Data Protection & Information Security Assessment and returned this to the Information Governance team. (Contact Information Governance team on 65824 if assistance is required)		
Explain to the new Staff member that IT faults can be reported using the IT Service Desk User Portal. Access IT Service Desk User Portal Training ↗		
Complete Equality, Diversity and Dignity at Work eLearning mandatory training via ESR within 28 days. Click here for the guide ↗		
Staff member familiar with the Conflicts of Interest (Declarations) ↗ guidance to ensure compliance with the Conflicts of Interest Policy and ensure any positive interests are registered within 28 days		
Aware of the location of Business Continuity laptops - located on every ward and ONLY to be used when clinical systems are unavailable. Laptops must not be unplugged, turned off or moved to another location.		
Aware of the location of PPM+ Back-Up Kit (red folder) - to be used to document immediate patient care in the event of clinical systems being unavailable. CSUs store these kits locally		
Staff Health and Wellbeing		
Explain the health and wellbeing offer in the Trust using the most up to date information - click here for latest guidance ↗		
Undertake a wellbeing conversation (discussing health and wellbeing, flexible working and diversity and inclusion). The conversation template is available here ↗		
Complete the Individual Risk Assessment to identify any COVID-19 risks and agree actions to create a safe working environment - click here for latest guidance ↗		
DBS Update Service Renewal Reminder		
Explain the importance of the Annual Renewal for the DBS Update Service. Remind staff that a condition of their continued employment with the Trust is for them to pay for and maintain their annual subscription for the DBS Update Service. If staff allow the subscription to lapse they will be required to pay for a new DBS check to be completed (Enhanced £48, Standard £30) and a further £13 to re-join the update service.		

You should now progress to setting your objectives for the period until your first appraisal.

Agreeing priorities until first AfC appraisal

Agreeing priorities must help the individual to identify and focus on what should be achieved in the months preceding the agreement of priorities at the first formal AfC appraisal and development review. Complete this section with the individual during their induction. Make sure priorities are linked to those of the organisation, CSU and team. Further guidance on agreeing priorities can be found in the [Appraisal Best Practice Guide](#)

Priorities for this appraisal year	How will you know when the priority has been achieved?	When will it be achieved?	What support do you need?
Compulsory additional priorities if manager or appraiser	How will you know when the priority has been achieved?	When will it be achieved?	What support do you need?
All staff appraisals completed on time and to the appropriate quality.	Reports showing green for all individual appraisals		
All staff mandatory training up to date	Reports showing green for all individual mandatory training or evidence of mitigating factors		

The Leeds Teaching Hospitals NHS Trust Objectives 2021

You can use these to help set individual objectives to ensure they are aligned to the objectives of the Trust. You may want to consider if there are team or CSU level objectives that can be used to ensure alignment of individual objectives. Consider where the individual's role can impact on the Leeds Way Behaviours and objectives.

- 1 We will achieve CQC Outstanding at our next inspection
- 2 We will provide excellent education, training and development so that people are skilled to do their job and realise their full potential
- 3 Every patient will have the opportunity to benefit from and participate in research
- 4 We will deliver outstanding specialist services, investing in our future by delivering Building the Leeds Way
- 5 We will deliver a sustainable surplus by becoming the most efficient teaching hospital in England
- 6 We will work with our partners to provide person-centred care across care settings, delivering more care closer to home
- 7 By 2024 we will have the highest staff engagement score nationally

The Leeds Way

The Leeds Way describes the values and respectful behaviours important to us and the success of our organisation. The behaviours are those that staff must apply and demonstrate in their work to deliver quality services and which centre on our commitment to provide consistently high levels of patient care. Staff will be required to reflect on these values as part of the annual appraisal process.

	<p>PATIENT CENTRED</p> <ul style="list-style-type: none"> • Go the extra mile: Let's all do an extra little bit to create an outstanding experience for our patients, families, volunteers and staff. We'll go and see how our actions and decisions affect others. • Be responsive: Enable our patients and people to be actively engaged in decision making. • Keep it simple: Use appropriate language to ensure everyone understands what is happening and why. understand the message
	<p>FAIR</p> <ul style="list-style-type: none"> • Respect: Value everyone's feelings and thoughts and treat others as they wish to be treated. • Be consistent: Treat people equally without favouritism or discrimination. • Speak up: Working together, let's create an environment where people feel confident to speak up when something doesn't feel right.
	<p>COLLABORATIVE</p> <ul style="list-style-type: none"> • Be a team player Work together to create an environment where help is happily offered, asked for and received. • Communicate and collaborate on decisions: Work together to achieve the best outcomes. • Walk in their shoes: Empathise with others and understand their experience and point of view. Be considerate, go and see.
	<p>ACCOUNTABLE</p> <ul style="list-style-type: none"> • Keep your promises: Hold ourselves and others to account to ensure we do what we've said we will do. • Continuous Learning: Encourage our people to experiment and innovate and to seek opportunities to learn. • Takes responsibility: Recognise when things have gone wrong, apologise and understand why without blame.
	<p>EMPOWERED</p> <ul style="list-style-type: none"> • Grow and develop: Create an environment where individuals develop their own potential, seek and provide feedback and share learning and expertise with others • Support others to succeed: Enable others to take action, learn, share ideas, opinions and perspectives to succeed. • Shares information: Ensure that everyone has the information they need to do their work or manage their health. Sharing information and communicating openly signals that you trust and respect others.

Signing the local induction objective setting document

- ✓ An agreement has been reached with the individual about performance priorities and any associated actions for the coming year up to the annual appraisal
- ✓ The individual understands the Leeds Way Behaviours and how to apply and demonstrate these in their work

	Signed	Date
Manager		
Staff member		

This local induction can be completed and recorded within the [Training Interface](#) through the 'Review Manager' section. Doing so will enable the set objectives to appear in the next appraisal record for review. Alternatively, notification of completion of the Local Induction Checklist should be emailed to: leedsth-tr.mandatorytraining@nhs.net, so it can be recorded on the Electronic Staff Record.

A signed hard copy of the checklist should be kept by the Line Manager in the staff member's personal file.

The person who will be responsible for conducting appraisals for the new colleague is required to set up the relationship in the Review Manager section of the Training Interface. This must be accepted via the individual's own Training Interface account [click here to watch the help video](#).

Appendix 1

List of suggested Policies and Procedures that the Line Manager can discuss with the new starter - [Policy Directory](#) ↗

- Appraisal Policy
- Complaints Policy
- Conduct and Discipline Policy
- Conflict Resolution (reducing violence & aggression in the workplace) Policy
- Counter-Fraud, Bribery and Corruption Policy
- Dignity at Work Policy
- Equality and Diversity Policy
- Fire Safety Policy
- Freedom to Speak up Policy
- General Data Protection Regulation (GDPR) Policy
- Hand Hygiene Policy
- Health and Safety Policy
- Incident Reporting Procedures
- Infection, Prevention and Control – Managing the Associated Risks Policy
- Lone Worker Procedure
- Managing Conflicts of Interest for Staff at LTH Policy
- Medical Devices Management Policy
- Medicines Management Policy
- Musculoskeletal Disorders Prevention Policy
- [Quality & Safety Matters Briefings](#) ↗
- Risk Management Policy
- Safeguarding Adults at Risk Policy
- Safeguarding Children Policy
- Slips, Trips and Falls Prevention Procedure
- Slips, Trips and Falls Clinical Procedure
- Smoking Control Policy
- Standing Financial Instructions and Schemes of Delegation
- Standing Orders
- Supporting Attendance Policy
- Supporting Performance Policy
- Training Policy
- Transfusions - Safer Transfusion Policy
- Trust Incident Response Plan
- Virtual Meetings Policy
- Volunteering Policy
- VTE Reducing Avoidable Harm Policy
- Waste Policy