



Line Managers Induction Pack

Coventry & Rugby GP Alliance

Version 1.0

January 2026

To be reviewed January 2027

Line Manager Name:

New Starter Name:

Onboarding Checklist

	Action Item	Relevant Department/contact	Line Manager to sign and date when completed
Asset Management	Laptop requested (If applicable) and property form completed (below)	Office Coordinator /Line Manager	
	Work Phone supplied (If applicable) and property form completed (below)	Office Coordinator /Line Manager	
	CWPT – Marvel request form completed to transfer laptop. MLCSU – Complete all in one form on Sunrise self service	CWPT IT / MLCSU IT	
	ID Badge Smart Card Personal Alarm (if lone worker)	HR Line Manager Line Manager	
	Key/Gate fob (based at EW) Swipe Pass (Hodge Hill)	Office Coordinator Building Manager	
Access to Relevant systems	Ensure new starter form on Marvel/Sunrise has been requested a minimum of 72 hours before start date.	CWPT IT / MLCSU IT	
	Request nhs.net email or transfer existing nhs.net email to CRGPA. ARRS staff ensure email relates to a practice they will be covering.	CWPT IT / MLCSU IT	
	Update HR of staff member nhs.net email to set up on Practice index.	Line manager	
	Ensure access to other relevant systems such as EMIS/SystmOne, AccuRX, Smartcard	Line Manager	
	Include relevant department links, request for L/G/S Drive and relevant mailboxes.	CWPT IT / MLCSU IT	

	Liaise with departments to ensure appropriate access: Datix Xon Practice index HR System Car Parking Permit (EW only)	Governance Office Coordinator HR HR Office Coordinator	
	Ensure work pattern and annual leave are correct on HR System.	Line Manager	
	Introduce to Staff Zone including password	Line Manager	
	SAGE access for payslips (staff member encouraged to download app to phone).	Line Manager/ Finance (Payroll)	
	Ensure any reasonable adjustments are in place (if recommended by Occupational Health).	Occupational Health Line Manager Office Coordinator	
	Printer access (if required).	CWPT IT / MLCSU IT	
Health and Safety	Complete DSE form (below) and return to crgpa.safety@nhs.net (if equipment required) and HR (for storing in personal file).	Staff/Line Manager	
	Complete Health & Safety Induction Checklist below (for permanent area) and return to crgpa.hr@nhs.net	Staff/Line Manager	
Induction Presentations	Corporate Induction Update HR of start date so can be added to next session	HR	
	Departmental Induction related to role.	Line Manager	
Declaration of Interest	Employee to complete the Declaration of Interest Form below and return to crgpa.safety@nhs.net	Staff/Line Manager	
Probation	Statutory and Mandatory training to be completed within 3 months. Book 4/8/12 week probation meetings and update HR once 12 week completed.	Line Manager.	
		Line Manager	

Completed forms to be sent to HR for filing in employee's record crgpa.hr@nhs.net.

Line Manager Signature

Employee Signature

Date



Health and Safety
Executive

Display screen equipment (DSE) workstation checklist

To ensure staff are working safely we ask that all staff complete the below DSE, at least annually or more frequently if required/ circumstances change.

Line Managers are required to: support employees to complete their DSE, check the assessment, sign and date the assessment and follow up on the results and take necessary actions.

Once fully completed please send this form to crgpa.hr@nhs.net.

1. Work Status: Worker/Office Based



Employee Name:

Date completed:

Signature:

Assessment Checked By:

Date:

Signature:

1. Further Action Required: Yes/No

Further Action Completed (date):

This is a web-
friendly version of
*Display screen
equipment (DSE)
workstation checklist*
published 05/13

The following checklist can be used to help you complete a risk assessment and comply with the Schedule to the Health and Safety (Display Screen Equipment) Regulations 1992 as amended by the Health and Safety (Miscellaneous Amendments) Regulations 2002.

The questions and 'Things to consider' in the checklist cover the requirements of the Schedule. If you can answer 'Yes' in the second column against all the questions, having taken account of the 'Things to consider', you are complying. You will not be able to address some of the questions and 'Things to consider', eg on reflections on the screen, or the user's comfort, until the workstation has been installed. These will be covered in the risk assessment you do once the workstation is installed.

Work
through the
checklist,
ticking either
the 'Yes' or
'No' column

against each risk factor:

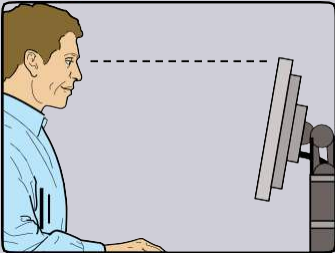
- 'Yes' answers require no further action.
- 'No' answers will require investigation and/or remedial action by the workstation assessor. They should record their decisions in the 'Action to take' column. Assessors should check later that actions have been taken and have resolved the problem.

Remember, the checklist only covers the workstation and work environment. You also need to make sure that risks from other aspects of the work are avoided, eg by giving users health and safety training, and providing for breaks or changes of activity.

For more advice on these see *Working with display screen equipment (DSE): A brief guide*.

Risk factors	Tick answer	Things to consider	Action to take
	Yes	No	
1 Keyboards			
Is the keyboard separate from the screen?	☐	☐	This is a requirement, unless the task makes it impracticable (eg where there is a need to use a portable).
Does the keyboard tilt?	☐	☐	Tilt need not be built in.
Is it possible to find a comfortable keying position?    	☐	☐	Try pushing the display screen further back to create more room for the keyboard, hands and wrists. Users of thick, raised keyboards may need a wrist rest.
Does the user have good keyboard technique?	☐	☐	Training can be used to prevent: ■ hands bent up at the wrist; ■ hitting the keys too hard; ■ overstretching the fingers.
Are the characters clear and readable?	☐	☐	Keyboards should be kept clean. If characters still can't be read, the keyboard may need modifying or replacing. Use a keyboard with a matt finish to reduce glare and/or reflection.

Risk factors	Tick answer		Things to consider	Action to take
	Yes	No		
2 Mouse, trackball etc				
Is the device suitable for the tasks it is used for?	☐	☐	If the user is having problems, try a different device. The mouse and trackball are general-purpose devices suitable for many tasks, and available in a variety of shapes and sizes. Alternative devices such as touch screens may be better for some tasks (but can be worse for others).	
Is the device positioned close to the user?	☐   	☐	Most devices are best placed as close as possible, eg right beside the keyboard. Training may be needed to: ■ prevent arm overreaching; ■ encourage users not to leave their hand on the device when it is not being used; ■ encourage a relaxed arm and straight wrist.	
Is there support for the device user's wrist and forearm?	☐	☐	Support can be gained from, for example, the desk surface or arm of a chair. If not, a separate supporting device may help. The user should be able to find a comfortable working position with the device.	
Does the device work smoothly at a speed that suits the user?	☐	☐	See if cleaning is required (eg of mouse ball and rollers). Check the work surface is suitable. A mouse mat may be needed.	
Can the user easily adjust software settings for speed and accuracy of pointer?	☐	☐	Users may need training in how to adjust device settings.	

Risk factors	Tick answer		Things to consider	Action to take
	Yes	No		
3 Display screens				
Are the characters clear and readable? Health and safety Health and safety	☐	☐	Make sure the screen is clean and cleaning materials are available. Check that the text and background colours work well together.	
Is the text size comfortable to read?	☐	☐	Software settings may need adjusting to change text size.	
Is the image stable, ie free of flicker and jitter?	☐	☐	Try using different screen colours to reduce flicker, eg darker background and lighter text. If there are still problems, get the set-up checked, eg by the equipment supplier.	
Is the screen's specification suitable for its intended use?	☐	☐	For example, intensive graphic work or work requiring fine attention to small details may require large display screens.	
Are the brightness and/or contrast adjustable?	☐	☐	Separate adjustment controls are not essential, provided the user can read the screen easily at all times.	
Does the screen swivel and tilt? 	☐	☐	Swivel and tilt need not be built in; you can add a swivel and tilt mechanism. However, you may need to replace the screen if: ■ swivel/tilt is absent or unsatisfactory; ■ work is intensive; and/or ■ the user has problems getting the screen to a comfortable position.	

Risk factors	Tick answer		Things to consider	Action to take
	Yes	No		
Is the screen free from glare and reflections?	☐	☐	Use a mirror placed in front of the screen to check where reflections are coming from. You might need to move the screen or even the desk and/or shield the screen from the source of the reflections. Screens that use dark characters on a light background are less prone to glare and reflections.	
Are adjustable window coverings provided and in adequate condition?	☐	☐	Check that blinds work. Blinds with vertical slats can be more suitable than horizontal ones. If these measures do not work, consider anti-glare screen filters as a last resort and seek specialist help.	
4 Software				
Is the software suitable for the task?	☐	☐	Software should help the user carry out the task, minimise stress and be user-friendly. Check users have had appropriate training in using the software. Software should respond quickly and clearly to user input, with adequate feedback, such as clear help messages.	

Risk factors	Tick answer		Things to consider	Action to take
	Yes	No		
5 Furniture				
Is the work surface large enough for all the necessary equipment, papers etc?  	☐	☐	Create more room by moving printers, reference materials etc elsewhere. If necessary, consider providing new power and telecoms sockets, so equipment can be moved. There should be some scope for flexible rearrangement.	
Can the user comfortably reach all the equipment and papers they need to use?	☐	☐	Rearrange equipment, papers etc to bring frequently used things within easy reach. A document holder may be needed, positioned to minimise uncomfortable head and eye movements.	
Are surfaces free from glare and reflection?	☐	☐	Consider mats or blotters to reduce reflections and glare.	
Is the chair suitable? Is the chair stable? Does the chair have a working: ■ seat back height and tilt adjustment? ■ seat height adjustment? ■ castors or glides?	☐	☐	The chair may need repairing or replacing if the user is uncomfortable, or cannot use the adjustment mechanisms.	

ors	Tick answer		Things to consider	Action to take
Is the chair adjusted correctly?   	☐	☐	The user should be able to carry out their work sitting comfortably. Consider training the user in how to adopt suitable postures while working. The arms of chairs can stop the user getting close enough to use the equipment comfortably. Move any obstructions from under the desk.	
Is the small of the back supported by the chair's backrest?	☐	☐	The user should have a straight back, supported by the chair, with relaxed shoulders.	
Are forearms horizontal and eyes at roughly the same height as the top of the DSE?	☐	☐	Adjust the chair height to get the user's arms in the right position, and then adjust the DSE height, if necessary.	
Are feet flat on the floor, without too much pressure from the seat on the backs of the legs?	☐	☐	If not, a footrest may be needed.	

Risk factors	Tick answer		Things to consider	Action to take
	Yes	No		
6 Environment				
Is there enough room to change position and vary movement?	☐	☐	Space is needed to move, stretch and fidget. Consider reorganising the office layout and check for obstructions. Cables should be tidy and not a trip or snag hazard.	
Is the lighting suitable, eg not too bright or too dim to work comfortably?	☐	☐	Users should be able to control light levels, eg by adjusting window blinds or light switches. Consider shading or repositioning light sources or providing local lighting, eg desk lamps (but make sure lights don't cause glare by reflecting off walls or other surfaces).	
Does the air feel comfortable?	☐	☐	DSE and other equipment may dry the air. Circulate fresh air if possible. Plants may help. Consider a humidifier if discomfort is severe.	
Are levels of heat comfortable?	☐	☐	Can heating be better controlled? More ventilation or air conditioning may be required if there is a lot of electronic equipment in the room. Or, can users be moved away from the heat source?	
Are levels of noise comfortable?	☐	☐	Consider moving sources of noise, eg printers, away from the user. If not, consider soundproofing.	

7 Final questions to users...

- **Has the checklist covered all the problems they may have working with their DSE?**
 - Have they experienced any discomfort or other symptoms which they attribute to working with their DSE?
 - Has the user been advised of their entitlement to eye and eyesight testing?
 - Does the user take regular breaks working away from DSE?

Write down any problems/actions here:

Once fully completed please send this form to crgpa.hr@nhs.net.

Further information

Working with display screen equipment (DSE): A brief guide Leaflet INDG36(rev4) HSE books 2013 www.hse.gov.uk/pubns/indg36.htm

For information about health and safety, or to report inconsistencies or inaccuracies in this guidance, visit www.hse.gov.uk/. You can view HSE guidance online and order priced publications from the website. HSE priced publications are also available from bookshops.

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This guidance is issued by the Health and Safety Executive. Following the guidance is not compulsory, unless specifically stated, and you are free to take other action. But if you do follow the guidance you will normally be doing enough to comply with the law. Health and safety inspectors seek to secure compliance with the law and may refer to this guidance.

Published by the Health and Safety Executive 05/13

Health and Safety Induction Checklist

Employee Name:	
Job title and Department:	
Date of Joining:	
Manager Name:	

To be completed on staff members first day		
Topic	Action	Date achieved
Health and safety	Arrange for staff member's access to the organisation's policy library	
	Explain the legal responsibility to comply with HASAW requirements and report any issues or risks	
	Location of HSE health and safety poster	
	Name of sites health and safety representatives	
	Highlight IPC requirements on attending work when infectious or following diarrhoea and vomiting	
	Establish if any PPE is required	
	Establish any cultural or language requirements	
	Possible hazards in area, e.g. slips, trips, cables	
Fire and evacuation	Action to take in the event of a fire including how to raise the alarm (GEEP)	
	Action to take on hearing the fire alarm (when a test is not scheduled) Note any staff members who may need additional support during any evacuation (PEEP)	
	Explain when the fire alarm is tested	
	Fire evacuation routes and exits, and the need for keeping corridors and fire exits clear	
	Location of fire alarm call points	
	Location of assembly point	

	Identity of fire marshals and their role	
	Fire doors, their purpose and how to both open and close them (if applicable)	
	Location of fire extinguishers and blankets	
	Emergency lighting awareness	
Accident /First Aid	Explain how to report an accident or incident (Datix)	
	Location of first aid box	
	Identity of first aiders	
	Any staff issues that may need additional support, e.g., diabetes, and items in fridge specific to managing a diabetic emergency. Additional awareness training may be required to support any medical emergency – e.g., Diabetes.org on how to spot the onset of diabetes, etc.	
Welfare Facilities	Tour of the workplace	
	Toilets	
	Restroom	
	Kitchen facilities/drinking water	
	Recycling and rubbish disposal	
Security	Access to building	
	Locking and unlocking process and operation of security alarm (if staff member required to lock/open up)	
	Visitor and contractor procedures e.g. signing in and issuing visitor lanyard	
	Car parking procedures	
Personal Safety	Lone working procedures (if applicable)	
Electrical Equipment	Safe use of electrical equipment including visual inspections and PAT	

Statutory and Mandatory HASAW Training	Arrange for E-training to support HASAW: • Accident and incident reporting • Display screen equipment • Lone working (if applicable) • Moving and handling (Level 1 for all staff or Level 2 for clinical staff) • Office, electrical and fire safety • Health, safety and welfare  eLearning is available in the HUB .	
Work Activities	Information on safe lifting and working at height (if applicable)	
	Safe use, handling, storage and disposal of chemicals and substances (if applicable)	
	Mobile phone policy and work-related driving	

To be completed within one month of joining		
Topic	Action	Date achieved
Monitor and Review	Review first month with employee	
	Confirm their understanding of all arrangements in place	
DSE	Carry out DSE workstation assessment and provide information on eye test arrangements	

Employee: I confirm that the above health and safety induction has been provided, and I fully understand my responsibilities towards health and safety.	
Employee Name & Signature:	
Date	
Line Manager Name & Signature	

The line manager will ensure that this form is completed and signed within one month of the new employee commencing employment. A signed copy of this form is to be retained by both the organisation (HR Personnel Folder) and the employee.

Please send completed form to crgpa.hr@nhs.net for filing.

Declarations of Interest Form

Name:	
Position within, or relationship with, the Coventry & Rugby GP Alliance:	

1. Detail of interests held (complete all that are applicable). If there are no interests please indicate a 'nil' response:

Type of Interest* *See reverse of form for details	Description of Interest (including, for Indirect Interests, details of the relationship with the person who has the interest)	Date interest Relates from and to:		Actions to be taken to mitigate risk (to be agreed with line manager)
		From	To	

The information submitted will be held by the CRGPA for personnel or other reasons specified on this form and to comply with the organisation's policies. This information may be held in both manual and electronic form in accordance with the Data Protection Act 2018. Information may be disclosed to third parties in accordance with the Freedom of Information Act 2000 and published in registers that the CRGPA holds.

I confirm that the information provided above is complete and correct. I acknowledge that any changes in these declarations must be notified to the CRGPA as soon as practicable and no later than 28 days after the interest arises. I am aware that if I do not make full, accurate and timely declarations then civil, criminal, or internal disciplinary action may result.

I **do / do not** give my consent for this information to published on registers that the CRGPA holds. If consent is NOT given, please give reasons in the box below:

--

Print Name:

Signature:

Date:

Line Manager:

Line Manager Signature:

Date:

(It is the line managers responsibility to review all DOI and investigate if required, for support speak to the Governance Team).

Please return this completed form to:

CRGPA Governance and Safety Team

Email: crgpa.safety@nhs.net

Type of Interest	Description
Financial Interests	This is where an individual may get direct financial benefits from the consequences of a commissioning decision. This could include being: • A director, including a non-executive director, or senior employee in a private company or public limited company or other organisation which is doing, or which is likely, or possibly seeking to do, business with health or social care organisations; • A shareholder (of more than 5% of the issued shares), partner or owner of a private or not for profit company, business or consultancy which is doing, or which is likely, or possibly seeking to do, business with health or social care organisations. • A consultant for a provider; • In secondary employment; • In receipt of a grant from a provider; • In receipt of research funding, including grants that may be received by the individual or any organisation in which they have an interest or role; and • Having a pension that is funded by a provider (where the value of this might be affected by the success or failure of the provider).
Non-Financial Professional Interests	This is where an individual may obtain a non-financial professional benefit from the consequences of a commissioning decision, such as increasing their professional reputation or status or promoting their professional career. This may include situations where the individual is: • An advocate for a particular group of patients; • A GP with special interests e.g., in dermatology, acupuncture etc. • A member of a particular specialist professional body (although routine GP membership of the RCGP, BMA or a medical defence organisation would not usually by itself amount to an interest which needed to be declared); • An advisor for CQC or NICE; • A medical researcher.
Non-Financial Personal Interests	This is where an individual may benefit personally in ways which are not directly linked to their professional career and do not give rise to a direct financial benefit. This could include, for example, where the individual is: • A voluntary sector champion for a provider; • A volunteer for a provider; • A member of a voluntary sector board or has any other position of authority in or connection with a voluntary sector organisation; • A member of a political party; • Suffering from a particular condition requiring individually funded treatment; • A financial advisor
Indirect Interests	This is where an individual has a close association with an individual who has a financial interest, a non-financial professional interest or a non-financial personal interest in a commissioning decision (as those categories are described above). This should include: • Spouse /partner; • Close relative e.g., parent, [grandparent], child, [grandchild] or sibling; • Close friend; • Business partner.

AGREEMENT TO CARE FOR AND RETURN COMPANY PROPERTY

I acknowledge receipt of the following property that belongs to the Coventry & Rugby GP Alliance:

Item Description e.g. laptop, phone, key	Serial / Asset Number (if applicable)	Condition	Accessories Included e.g. charger, case, bag

I acknowledge that I will take proper care of this and all other company property I am entrusted with. I further understand that upon termination of my employment, I will return all Coventry & Rugby GP Alliance property, and that the property will be returned in proper working order.

I understand I may be held financially responsible for lost or damaged property. This agreement includes, but is not limited to, laptops, mobile phones, keys/fobs and other items. I understand that the failure to return property will be considered theft and may lead to criminal prosecution by the organisation.

1. Employee Information

Full Name _____

Department _____

Job Title _____

Manager/Supervisor _____

Employee Signature _____

Date ____ / ____ / ____

2. Equipment issued by

Name _____

Department _____

Signature _____

Date ____ / ____ / ____

On completion, please ensure this form is returned to HR.