



Onboarding

Once the initial recruitment and contracting phases are complete, the next step is to effectively onboard the new employee. Onboarding can set the tone for a clinician's tenure with an organization.

- Assign staff members responsible.
- Work with various departments to determine what needs to be covered.
- Ensure the organization is prepared for employee on Day 1.
- Set a first day/week of employment agenda for new employees.
- Delegate a mentor for the new employee.
- Check in after Day 1, 30, 60, 90, ongoing.

Sample Onboarding Checklists by Area

Organization Background Overview/Policies

Staff Assignment: Human Resources, Chief Executive Officer

- ✓ Mission
- ✓ Hours/Call Coverage
- ✓ Employee Name Tag/Business Cards/Lab Coat, etc. (*Prepared in advance*)
- ✓ Hiring Announcement (*Make in advance to staff, add new employee to staff list, website, make community announcement after start date*)
- ✓ I-9 Forms, Tax Forms, etc.
- ✓ Policies & Procedures Handbook
- ✓ Confidentiality Statement/HIPAA Statement
- ✓ Organizational Chart
- ✓ Introductory Period Explanation
- ✓ Employee Job Description/Performance Review Process
- ✓ Dress Code
- ✓ Corrective Action Process
- ✓ Drug Free Workplace Policy/Smoke Free Workplace Policy
- ✓ Family Medical Leave Act/Leave of Absence
- ✓ Affirmative Action
- ✓ EHR System Introduction
- ✓ Use of Office Equipment: Copier, Phone System, E-Mail, Voice Mail, Interoffice Mail System

Payroll/Accounting

Staff Assignment: Accounting Manager, Chief Financial Officer, Human Resources

- ✓ Payroll Dates/Pay Periods
- ✓ Exempt Status & Overtime



Onboarding

- ✓ Lunch/Breaks
- ✓ Holidays
- ✓ Paid Time Off/Vacation/Sick Time
- ✓ Weather Emergencies
- ✓ Attendance Policy
- ✓ Time Clock & Timekeeping Policy
- ✓ Salary Confidentiality
- ✓ Direct Deposit

Benefits

Staff Assignment: Human Resources

- ✓ Medical & Dental Benefits
- ✓ Malpractice Insurance
- ✓ Flexible Spending Accounts
- ✓ Life Insurance
- ✓ Long/Short Term Disability Insurance
- ✓ Pension Plan/Retirement Options
- ✓ Continuing Education (CEUs)
- ✓ Employee Assistance Program (EAP)

Facility Information

Staff Assignment: Human Resources, Administrative Staff, Facility Manager

- ✓ Tour of Building(s)
- ✓ Parking (*If employee has assigned spot, have this ready on their first day*)
- ✓ Security

Quality & Safety Orientation

Staff Assignment: Quality Director, Human Resources, Clinic Director

- ✓ Employee Accidents
- ✓ Codes
- ✓ Fire Safety
- ✓ Infection Control
- ✓ Patient Safety
- ✓ Patient Center Medical Home (PCMH)