

Practice Self-Assessment: Keys to Successful Onboarding



Successfully bringing new employees into an established practice can be a daunting task. This self-assessment checklist was designed to help you gauge how prepared your practice is to successfully onboard new team members.

Job Requirements/Forms

	Yes	Somewhat	No
1. Written offer letters outlining wage/salary, start date, working hours, attire, and benefits package are provided.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Current, written job descriptions are in place for each position in the practice.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Employee is told to bring all necessary paperwork and identification on the first day.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. All federal and state new hire forms are completed on employee start date (i.e., W-4 form, state tax form, I-9 form, direct deposit form, etc.).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Policies and Procedures

1. Practice has a policy and procedure manual/employee handbook.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. All safety and legal working regulations (i.e., OSHA, HIPPA, etc.) are reviewed with employee on first day, and as necessary thereafter.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Employee Workstation/IT

1. Employee workstation and necessary communication portals (i.e., computer station, email, network account(s), voicemail, and phone) are set up ahead of start date.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Employee is set up on, and provided with a training plan for, any PM/EMR (if applicable).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Introductions and Integration

1. Employee is provided with a tour of the facility, and introduced to all staff members.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Employee receives a small welcome gift, a welcome lunch, or some other acknowledgement for joining the team.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Training

1. Employee receives a written training plan outlining the initial weeks/months of employment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Employee is aligned with a "buddy" (other than his/her manager) who can help answer questions and provide direction if the manager is unavailable.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Employee is provided with written protocols for how to complete his/her primary job functions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>