

NEW EMPLOYEE ONBOARDING GUIDE

Your office has a culture, and your office tells a story. It's a story of how you serve your patients, how the existing team and the practice came to be. It's a story of triumphs and life circumstances. When you hire a new team member, they need to be told this story. And most importantly: they need to know how they fit into this story.

Your #1 onboarding purpose is to develop this person into the best team member possible.

Onboarding Stats:

- ✓ 70% of new hires decide within the first month if a job is the right fit, highlighting the importance of early engagement
- ✓ Employees with poor onboarding experiences are twice as likely to seek new opportunities soon after starting
- ✓ Organizations with a formal onboarding process experience 50% higher new hire retention compared to those without
- ✓ Replacing an employee can cost between 16% to 213% of their annual salary, depending on the position and experience level
- ✓ A toxic workplace culture is a leading reason for employee departures, with 58% of employees quitting due to such environments
- ✓ In the first quarter of 2024, U.S. employee engagement reached an 11-year low, with only 30% of employees feeling engaged at work

What gets measured gets managed.

Preparation:

- ☐ Gather forms and documents, new hire paperwork, job description, policy manual
- ☐ Message the employee about their first day, what to bring, dress code/uniforms, so happy to see you, etc
- ☐ Set up technology, email, accounts, workstation
- ☐ Plan intentional moments that will make the new person feel special: welcome card, flowers, food, practice-logo swag, gestures from other team members, etc.
- ☐ Use the outline below as a rough guide, and be sure not to overwhelm the new person. They will need plenty of time to absorb your culture
- ☐ As much as possible, attempt to onboard in a mix of learning styles
 - ☐ Visual (reading, watching a video)
 - ☐ Auditory (listening to others speak or watching a video)
 - ☐ Kinesthetic (using their hands/body, writing notes, performing actions)
- ☐ Reach out to current team members who were hired 1-2 years ago and ask them what was helpful or not helpful in their onboarding process

First Week

- ☐ Practice Basics
 - ☐ History of the company/practice
 - ☐ Vision, Mission, Values, Philosophy
 - ☐ Who is their point of contact for various situations? Time off, calling in sick, problems/concerns, training questions, operations questions, etc.
- ☐ Basic Paperwork
 - ☐ New Hire Paperwork
 - ☐ I-9 Form done by day 3
 - ☐ Payroll setup, W-4, and applicable state tax forms
 - ☐ Health insurance enrollment
 - ☐ Read the HR policy manual
 - ☐ Sign/Acknowledge the HR policy manual
 - ☐ Make copies of any necessary licenses or certifications, note expiration dates
 - ☐ Review of job description, sign Job Description Acknowledgement Form
 - ☐ Emergency contact information
- ☐ Introductions with all team members
 - ☐ Lunch or Coffee with everyone
 - ☐ Workspace tour, ergonomics
 - ☐ Assign a work buddy who they can go to with questions and who will check in with them as well
- ☐ Basic Office Parts & Pieces
 - ☐ Email setup
 - ☐ Security setup, office keys/cards, alarm code
 - ☐ Accounts and passwords
 - ☐ Where to put their stuff
 - ☐ Breakroom and Expectations
 - ☐ Location of fire extinguishers
 - ☐ Emergency exits
 - ☐ Evacuation protocols
 - ☐ Restroom Location
 - ☐ Office supplies/equipment
 - ☐ Review schedule and hours
 - ☐ Review payroll, timekeeping procedures and pay schedule
 - ☐ Employee access to HR Director
 - ☐ Review your Violence Protection Plan
- ☐ Uniforms & Appearance
 - ☐ Laundry process
 - ☐ Acknowledgement form for receipt of uniforms and/or reimbursement process
 - ☐ Review general Appearance policy expectations
- ☐ Don't forget to express gratitude for them to be here!
- ☐ Other Onboarding Areas
 - ☐ HIPAA onboarding
 - ☐ OSHA onboarding
 - ☐ Cyber Security

- ☐ Job Shadowing
 - ☐ Who is training with them and when?
 - ☐ Projects or Tasks to complete when needed?
- ☐ Check in with the new employee(s) and see how satisfied they are with the job so far
- ☐ Give the new employee an introduction to the business, including how their role fits in and any performance expectations you'll have for their onboarding
- ☐ Place a welcome gift on the new hire's desk (typically company swag such as a mug, t-shirt, or stationery)

First Month

- ☐ Establish and communicate milestones (where you want the person to be by when, for basic common job duties)
- ☐ Mentoring
- ☐ CE or skills development
- ☐ Invite your new employee to recurring one-on-one meetings to provide regular check-ins
- ☐ Invite new hires to shadow relevant meetings or projects, including different departments they won't work in directly. Expose them to what others do so they have a bigger picture view
- ☐ Be responsive to ad hoc questions throughout the day!
- ☐ Cultural Onboarding
 - ☐ Reiterate the overall vision
 - ☐ Example Scenarios:
 - ☐ A patient arrives late, what do we do?
 - ☐ A patient repeatedly cancels their appointments at the last minute, how do we handle that?
 - ☐ One of our coworkers is going through a difficult time, what do we do?
- ☐ Check in with the new employee(s) and see how satisfied they are with the job so far

First Month to 3 Months

- ☐ Check in on progress and performance at least twice per month
- ☐ Continue inviting your new employee to recurring one-on-one meetings to provide regular check-ins
- ☐ Six to eight weeks in sit down and go over the New Employee Performance Review to discuss what is going well and where further work may need to be done
- ☐ Circle back around on topics you covered in the first few weeks, to ensure your new person has retained everything
- ☐ Around 90 days, if the person is still not performing at the level you expect, remember the old adage: "Hire Slow. Fire Fast." Work with an HR Specialist to minimize your risk and ensure your documentation will protect you from any sort of claim

Three Months to 6 Months

- ☐ Check in on progress and performance at least twice per month
- ☐ Survey your new employee(s) about their onboarding experience
- ☐ Check in with the new employee(s) and see how satisfied they are with the job so far
- ☐ Continue inviting your new employee to recurring one-on-one meetings to provide regular check-ins

New Hire *Get-To-Know-You* Intake Form

Tell us about yourself!

Employee Name _____ Date _____

What movies or shows are you binging these days?

What music makes your feet tap?

Do you enjoy getting lost in any particular books?

Who/What would you most like to see as a live event?

What is your favorite delicious treat or dessert?

What would a special dinner be for you?

What have been a couple of your most fabulous vacations?

What's currently on your vacation bucket list?

Please share any of your interests, hobbies, or shopping wish list items!

What are some fun activities you enjoy doing:

What furry friend pets do you currently have, if any?

NEW EMPLOYEE PERFORMANCE REVIEW

Employee _____ Date hired _____ Today's date _____

Current salary \$ _____ Date of last review _____ Next review _____

Attendance Record: # of days absent since hired _____ # of days late since hired _____

Has employee received any disciplinary warnings? Yes _____ No _____

If yes, list date(s) of warnings _____

	Needs Improvement	Satisfactory
Job Knowledge (How well does employee demonstrate competence?)		
Quality of Work (What is employee's quality of work?)		
Quantity of Work (Does quantity of work meet our standards?)		
Safety (Does employee work safely and follow safety rules?)		
Initiative (Is employee a "self starter"?)		
Dependability (Does employee follow instructions and do what is expected?)		
Conduct (Does employee follow policy and conduct him/herself professionally?)		
Attitude (Is employee's behavior toward job and others acceptable?)		
Cooperation (Does employee work effectively as a team member?)		
Absence/Punctuality (Review attendance record above)		
Training (Has employee been fully trained?)		

Action plan for improvement (*list what, how, and by when*) _____

Employer's signature _____ Date _____

Employee's signature _____ Date _____