

ORIENTATION TO OFFICE CHECKLIST

DIRECTIONS

Purpose: This checklist is done as part of the onboarding of every new employee. The checklist should be done as many times needed to get the new hire oriented to the work space. This checklist should be edited to most closely fit the specifics of your office including, if you are a specialist, any items that may be unique to your specialty.

CHECKLIST FOR ALL POSITIONS

Name: _____

Today's date: _____

- 1. Locate the Reception desk.
- 2. Locate the copy machine.
- 3. Locate the business license on the wall.
- 4. Locate the waiting room.
- 5. Locate the restrooms.
- 6. Locate the Office Manager's office.
- 7. Locate the Billing/Insurance Coordinator's office.
- 8. Locate the Doctor's office.
- 9. Locate any other admin offices such as patient consultation office, etc.
- 10. Locate each operatory. Count how many rooms.
- 11. Locate the Hygiene operatory/s.
- 12. Locate the operatory for imaging.
- 13. Locate the supplies cabinet in each operatory and any other room.
- 14. Locate the lab.
- 15. Locate the surgery room, if there is one.
- 16. Locate the fire extinguishers throughout the office.
- 17. Locate the kitchenette/breakroom and notice where the refrigerator, microwave, utensil drawer are and what supplies are kept in the cabinets.
- 18. Locate the main office thermostat.
- 19. Go outside the building. Locate the practice's sign.
- 20. Locate the parking lot.
- 21. Locate employee parking spots.
- 22. Locate the back door to the building, if there is one.

CHECKLIST FOR
FRONT OFFICE /
ADMIN POSITIONS

1. Locate your work area.
2. Locate the patient registration forms/tablet.
3. Locate where all other forms are kept for your position (i.e. patient health history, financial and insurance forms, patient privacy forms, patient letter templates, etc.)
4. Locate your computer.
5. Locate your phone and any phone equipment you will use (headphone, etc.)
6. Locate where the contact lists are that you will need for your job (i.e. vendors, answering service, office security, IT, cleaning service, etc.)
7. Locate the staff contact list.
8. Locate practice management software manuals and/or office software protocols including passwords, email address, etc.
9. Locate where patient files are that you may access.
10. Locate where any supplies needed for your job are kept.

CHECKLIST FOR
BACK OFFICE /
PATIENT
TREATMENT
POSITIONS

1. Locate the area/s where you will work.
2. Locate the computer you will use.
3. Locate the equipment you will use, including BP device.
4. Locate the manuals and/or office written protocols that you will need for the equipment you will use, such as imaging, scanner, practice management software, etc.
5. Locate the sterilization area and lab.
6. Locate where supplies needed for your job are kept.
7. Locate where clean uniforms are kept.
8. Locate any staff contact lists you need.
9. Locate where forms you will use on your job are kept.

FINAL STEP

You are now oriented. You may do the checklist several times until you feel familiar with the clinic. Turn in your completed checklist to the Office Manager.

Signature: _____

Date: _____