Onboarding Checklist

This checklist should be used from initial hiring through the onboarding process to help fill a vacant position with a qualified recruit. Every step should be completed in sequential order and no step should be skipped. Each action, unless stated otherwise, should be completed by the Office Manager.

Position Being Filled Today’s Date

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| **Pre-hire Phase** | | **Initial** |
|  | Determine which position needs to be filled. |  |
|  | Create a proposal to send to the owner detailing the position to be filled, reason position is needed, position hours, and expected wages and benefits. |  |
|  | Receive approval from the owner to fill the position. |  |
|  | Ensure job description is up-to-date. |  |
|  | Using details from the proposal, create job postings on applicable websites (e.g., LinkedIn, HR Careers, Craigslist, etc.) |  |
|  | Receive resumes and select those that are qualified based on experience. |  |
| **Applicant Phase** | | **Initial** |
|  | Schedule a phone interview with qualified applicants by emailing or contacting them by phone. |  |
|  | Conduct phone interviews per **Phone Interview Question Form**. During the interview, schedule in-person interviews for qualified applicants. These applicants are now candidates. |  |
|  | For non-qualified applicant, write up interview notes on the **Interview Notes Form.** Attach to the resume and file in “old resumes” file. |  |
|  | Notify the supervisor or owner of all scheduled in-person interviews to allow them the opportunity to attend. |  |
| **Candidate Phase** | | **Initial** |
|  | Meet candidates for scheduled in-person interviews. |  |
|  | Conduct interviews using the **In-person Interview Form**. Keep notes using the **Interview Notes Form**. |  |
|  | For candidates not selected to move forward in the interview process, state specific reasons for disqualification on the **Interview Notes Form**. Reasons must be factual—not based on opinions. Attach form to the resume and file in “old resumes” file. |  |
|  | For candidates selected for the next interview phase, notify the supervisor or owner who will conduct their interviews so they can determine if the candidates have enough experience/is a fit. |  |
|  | SUPERVISOR OR OWNER: Interview the candidate specifically on past experience and if they are fit for the practice. |  |
|  | If found qualified based on interview and any test results, conduct a background check and a reference check. |  |
|  | Propose an offer letter. Get approval from the owner if terms are different from original proposal. |  |
|  | For disqualified candidates, send a **Rejection Letter** via email. |  |
|  | Receive candidate’s offer letter acceptance. Candidate is now a new hire. |  |
| **New Hire Setup Phase** | | **Initial** |
|  | Schedule the new hire’s start date, and send the position and start date in an email to the supervisor and owner. |  |
|  | Send the new hire a welcome email that includes their start date, your contact information, and a prompt to fully complete all paperwork as listed in the **New Hire Checklist form.** |  |
|  | Set up the new hire’s email, computer access, and login information. |  |
|  | Input all new hire information into ePractice Manager. |  |
|  | Send an email to the health insurance representative to notify them of the new hire. |  |
|  | Enter all payroll data into the system and ensure I-9 is completely and correctly filled out. Store the I-9 with all employee I-9 forms  (i.e., Keep separate from the employee file). |  |
|  | Confirm the new hire’s arrival for their first day before the start date. |  |
| **Onboarding / Orientation Phase** | | **Initial** |
|  | Onboard the new hire using the **New Hire** **Orientation Scavenger Hunt** checklist. |  |
|  | Show the new hire their work area and provide them with supplies. |  |
|  | Set up the new hire in the time clock and have them practice clocking in and out. |  |
|  | Provide the new hire with a copy of the **Employee Introduction Manual** and the **Employee Handbook.** Have them sign that they received the employee handbook and upload the signed form into their personnel file in ePractice Manager. |  |
|  | Turn the new hire over to the supervisor. |  |
|  | SUPERVISOR: Have new hire read their job description and sign that they’ve read it. Answer any questions they may have. |  |
|  | Start new hire training program. |  |
|  | Schedule their 90-day review on the calendar. |  |
| **5-10 Days into Training** | | **Initial** |
|  | Verify new hire has completed study of the employee handbook and employee introduction manual. |  |
|  | Discuss with new hire when the 90-day review will be conducted and what to expect. |  |
| **30+ Days into Training** | | **Initial** |
|  | Upon employee’s 30-day mark, schedule a meeting with the insurance representative for benefit paperwork. |  |
|  | At 90-day mark, brief the employee on their active benefits. |  |
|  | Conduct 90-day review based on job description and training progress. |  |
|  | If the employee does not pass their 90-day review, initiate the termination process. |  |

This checklist is considered complete when all steps have been completed and initialed. Upload checklist in the employee’s personnel file on ePractice Manger.