PRACTICE MANAGER

Separation

Practice owners and managers know that the decision to terminate an employee should not be made lightly. When it becomes clear that you need to end employment with a team member, or when you are given notice or experience the sudden departure of an existing team member, having a predetermined sequence to follow makes a difficult situation easier to navigate.

First conduct an audit of the personnel file. Take note of the length of employment, as well as any compensation and benefits the employee is receiving. Document any training that has been provided as well as previous performance reviews, any corrective action taken, as well as formal disciplinary actions. Make sure to amend any documentation regarding these matters as needed.

Create a document to serve as a guide for the doctor and manager, which will allow for seamless navigation of conversations to follow. It will be important to identify a date and time to meet with the employee that will be the least disruptive to the schedule, patients and office.

Make a plan to brief the rest of the team, including how they will be informed, who will take over the work, any plans for new hiring, additional training needed, etc. Staff will most likely become aware of the event very soon after it occurs and the message to the team is important so it should remain consistent.

Utilize the checklist for employee separation to ensure practice safety, security, and recovery of any practice property and data. Be aware of and adhere to all legal regulations such as timeline for delivery of last paycheck, reconciliation of PTO and sick pay, handling of retirement plan, residual benefits, termination of benefits, etc.

Ensure that the environment is right for the meeting. It is important to keep it private (with a witness if warranted).

Complete all necessary documents in advance, such as a termination letter or acceptance of resignation letter, and ensure they are signed by management and ready to be signed by the employee. Depending on the circumstances, you may want to provide the employee with his/her original contract, signed NDA, agreeance with employee handbook and anything that will clearly outline how things move forward after separation.

In the case of termination, the conversation should be short and to the point, with enough information provided but without extensive detail. Additional details can inflame the situation. Make sure that the information is direct and clear. Note the effective date and time of termination, state that the employee is being released, as well as the general reason or statement of at-will separation. Be clear about next steps and when the employee will remove personal items, return practice items and how their final paycheck will be delivered.

The employee may want to ask questions or deliver information regarding the termination. Unless information given is worthy of further investigation, it is best to minimize additional conversation. It is better to listen, avoid the impulse to respond in detail, and state again that this is the action being taken, it is unfortunate but necessary, thank the employee for contributions, and wish the employee well in the future.

Document the conversation and include details, decisions and timelines agreed upon in the employee's personnel file. Make sure that the practice sends a uniform message to the team, and make sure to inform them of any specific verbiage to be used with vendors, patients, or other offices regarding the change being made.