

Checklist for Orientation of a New Team Member

Set up an Employee Record* containing:

- Resumé _____
- Completed application _____
- Interviewing notes and test forms _____
- Tax and employment forms, including the often-overlooked Employment Eligibility Verification (I-9) form from the US Dept. of Justice, Immigration and Naturalization Service _____
- Copies of licenses _____
- Personal data _____
- Salary and benefits _____
- OSHA-required medical and training records _____

Office tour, including review of work hours, dress code, personal item storage, parking, brief history of practice _____

Introduction to other staff (written list of names and brief job descriptions) _____

New team member's job description reviewed _____

Training procedures and expectations reviewed _____

Beginning and end of day procedures explained _____

Office security, lock up, housekeeping, etc. explained _____

Safe work procedures reviewed _____

Emergency procedures reviewed _____

Confidentiality emphasized concerning _____

- Salary _____
- Patient data _____
- Production, collection, and any other practice financial data _____

Hepatitis vaccine within ten days or declination signed _____

Covid vaccine policy for all staff explained _____

Insurance forms completed and submitted (at end of training period) _____

Office manual reviewed _____

*Note: All employee records should be similar and maintained permanently.