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# New Employee Onboarding

A systematic onboarding process is proven to enhance employee satisfaction, quickly bring employees to a level of efficiency, and increase employee retention. Provide this checklist to the new employee with a manager assigned to take ownership of the completion of tasks and assignment of appropriate training. The new employee and manager will work together to customize and accomplish the onboarding program.

## Before 1st Day

- Background check authorization signed, background check completed
- Certifications and licenses verified current and in good standing
- Employment contract signed
- Start date shared with the team and onboarding roles assigned
- Ensure workspace is ready and welcoming
- Share first day logistics – parking, time to arrive, lunch plan, necessary documents to bring

## 1st Day

- New Hire paperwork completed
  - Federal forms completed (W4, I-9, state tax withholding if applicable)
  - Employee Manual provided, reviewed, and acceptance signed
  - Emergency contact information
  - Wage notice (if applicable in your state)

- Sick leave notice (if applicable in your state)
- HBV declination or attestation
- New Hire Reference Materials shared
  - Approved chart note abbreviations
  - Verbal skills training (written resource)
- Job description reviewed and signed
- Order uniform/scrubs and name tag
- Ensure payroll setup completed
- Facility tour with safety focus
- Introductions made 1:1 to all staff members
- PPE Protocols defined
- Respirator fit test and medical evaluation (if required in your state)
- Complete quick first day debrief

## Within First Week

- Review Organizational Chart
- Review specific policies and benefits
- Review System access/login instructions/Passwords
- Begin Practice Management Software training
- Define where to record and find notes for different situations
- Define who to contact in the event of illness or vacation request
- Share Employee phone list and/or office communication system (such as Telegram)
- Review team meeting(s) schedules and formats
  - Define Huddle expectations
- Meeting with the Doctor to understand:
  - Vision/Mission
  - Philosophy of care

- Treatment offered and treatment routinely referred
  - Review list of commonly referred specialists
  - Transition expectations for patients when moving through the clinic
- Review 30/60/90 day orientation meetings followed by 6 month/annual meetings (set these up in the schedule)

## Within First Two Weeks

- OSHA (or state OSHA program) training completed within 2 weeks of hire date
- HIPAA Training completed
- Assign a mentor(s) and schedule training opportunities

## Within First 30 Days

- Review Verbal Skills training for patient communication
- Overview of Practice systems
- Continue Practice Management Software training

## 30-Day Review

- Hold a meeting with the team member; refine onboarding and training needs
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- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## 60-Day Review

- Hold a meeting with the team member; refine onboarding and training needs
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- \_\_\_\_\_

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## 90-Day Review

Hold a meeting with the team member; refine onboarding and training needs

Keys/alarm codes provided

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## Job-Specific Training

### Dental Hygienist

RDH-DDS Exam transition preferences

Periodontal Philosophy of Care (entire team)

Periodontal coding

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### Dental Assistant

Equipment use and maintenance

Materials

Sequencing of steps for procedures

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## Front Office Teams

- Scheduling protocols
- Practice financial policy
- Overview of managed care participation
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- \_\_\_\_\_
- \_\_\_\_\_