HEALTH CENTER ONBOARDING CHECKLIST

An Editable Template



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Table of Contents

[Why Onboarding? 2](#_Toc126831470)

[Orientation vs. Onboarding 2](#_Toc126831471)

[Role-Specific Onboarding 3](#_Toc126831472)

[Applying the JEDI Lens 3](#_Toc126831473)

[How To Use This Tool 4](#_Toc126831474)

[Onboarding Checklist – General/All Staff 5](#_Toc126831475)

[Preparatory 5](#_Toc126831476)

[Orientation 7](#_Toc126831477)

[Integration 11](#_Toc126831478)

[Onboarding Checklist – Provider Personnel-Specific Additions 13](#_Toc126831479)

[Preparatory 13](#_Toc126831480)

[Orientation 13](#_Toc126831481)

[Integration 13](#_Toc126831482)

[Documents Required for Onboarding 14](#_Toc126831483)

[Legal Forms 14](#_Toc126831484)

[Job-Specific Documents 14](#_Toc126831485)

[Company-Specific Documents 14](#_Toc126831486)

[Payroll & Benefits Documents 14](#_Toc126831487)

[Resources 14](#_Toc126831488)

[Works Cited 15](#_Toc126831489)

**ABOUT THE STAR2 CENTER**

The Solutions, Training, and Assistance for Recruitment and Retention (STAR²) Center is a project of the Association of Clinicians for the Underserved (ACU). In July 2014, ACU received funding under the national cooperative agreement (NCA) program – now referred to as the National Training and Technical Assistance Partners (NTTAP) program – to develop a clinician workforce center for retention and recruitment at health centers (HCs). HCs broadly include community health centers (CHCs), federally qualified health centers (FQHCs), migrant health centers (MHCs), health care for the homeless (HCH) health centers, public housing primary care (PHPC) health centers, teaching health centers (THCs), and look-alikes (LALs), etc. In partnership with the Federal Bureau of Primary Health Care (BPHC), ACU created the STAR² Center – pronounced Star Center – to provide free resources, training, and technical assistance to HCs facing high workforce needs.

The Health Center Onboarding Checklist (HCOC) is meant to be a working, living document that users can easily modify to stay up-to-date with the changing workforce needs of HCs and the evolving healthcare environment.

# WHY ONBOARDING?

Onboarding new employees is the process of integrating them into an organization and its culture, in addition to helping them access the tools and resources they will need to become a successful member of the team.

Organizations should approach new employee onboarding strategically. This process should last at least a year, with the goal of long-term retention in mind. A new hire’s experience in their first few days and months can be critical in increasing their sense of belonging and improving their relationship with an organization (Maurer, 2021). As such, onboarding serves as the bridge between recruitment and retention efforts. While one could argue that every part of the recruitment process is also part of retention as the organization is putting its best foot forward, onboarding is the step where someone who is outside the organizational community begins to become part of that group. It is the transition point from asking someone to join the organization to then encouraging them to stay.

## Orientation vs. Onboarding

It is important to note that onboarding is not the same thing as orientation, but rather that orientation is one part of onboarding. While orientation is concerned with paperwork and routine, onboarding focuses on integrating new staff into their role, the organization, and the community. It is critical to focus on integration rather than assimilation as an organization welcomes a new employee. Assimilation refers to the absorption of the cultural traditions of a population or a group (Jacobs et al., 2022); whereas, integration is a two-way process in which cross influences from both the cultures change (Hartmann, 2017). Integration sees each individual as bringing value to the organization and encourages them to share that value with the rest of the team. While there can be tension between promoting conformity to organizational requirements and encouraging individuality, managerial leaders should prioritize incorporating both a sense of belonging and a sense of value in bringing one’s whole self to work (Omanović & Langley, 2021).

## Role-Specific Onboarding

It is important to consider a staff person’s role as an organization plans their onboarding processes and procedures. While there are some near universal onboarding practices that should be implemented, there are also role-specific elements to include. Healthcare organizations are encouraged to create onboarding programs that are tailored to the needs of their new hires in an effort to strengthen retention and individuals’ success in their new roles (Oritz Pate, et al., 2023)

# APPLYING THE JEDI LENS

Racism, ableism, sexism, homophobia, transphobia, xenophobia, ageism, religious prejudice, and other forms of discrimination contribute to significant distress and workforce inequities among minoritized healthcare workers. These lie at the root of health inequities and contribute to disparities in health outcomes. The JEDI lens understands that the systemic oppression and marginalization of different groups can only be challenged by breaking down and rebuilding structures and systems. The JEDI lens believes the perspectives gained from the lived experiences of a diverse workforce infinitely strengthen any organization’s work and are vital to achieving their mission (ACU, 2021). Applying the JEDI lens means expanding our way of thinking beyond our own experiences and needs to include those of a diversity of people with distinct backgrounds, identities, lived experiences, values, and more. It requires continuous learning, humility, respect, accountability, curiosity, and grace.

When it comes to onboarding, applying the JEDI lens can include considering what kind of welcoming activities you utilize based on someone’s preferences, needs, or identity. Examples include:

* If welcoming a new staff member who is a practicing Muslim during Ramadan, consider activities that do not involve food.
* Providing materials such as benefits enrollment information in multiple languages or reviewing the onboarding schedule to ensure that there is adequate time to orient and educate newly hired staff members.
* If welcoming a new autistic staff member, review the timeline with them to make sure they are comfortable with it.
* Informing new employees about employee-led affinity groups

Additionally, each organization can build the diverse perspectives of the people whom you are onboarding by soliciting feedback throughout the process.

This document reflects the importance of embedding JEDI in every step of the retention and recruitment process, including onboarding. This resource includes both this section exploring how one can apply the JEDI lens to onboarding processes, and includes information on incorporating a JEDI lens throughout the document. Some additional ideas for including JEDI in your onboarding practices are:

* Define what diversity and inclusion means for your organization
* Include a diversity and inclusion onboarding session
* Train people managers on how they can be diversity leaders, too
* Coach the existing team on how to change to include new hires
* Empower your people managers to be diversity and inclusion leaders, too
* Inform new hires about your organization’s Employee Resource Groups
* Build a mentorship program (Trinidad, 2021)

You can also review the STAR2 Center resource, [Building an Inclusive Organization Toolkit](https://chcworkforce.org/web_links/building-an-inclusive-organization-toolkit/), for more information on how to guide and create a health center with these principles at its core. You can also access the STAR2 Center’s collection of [Diversity, Equity, and Inclusion (DEI)](https://chcworkforce.org/bundle/cultural-competency/) resources for health centers. Additionally, ACU continues its commitment to JEDI through its [Justice, Equity, Diversity, and Inclusion (JEDI) Initiative](https://clinicians.org/programs/justice-equity-diversity-inclusion/), which serves as a resource for individuals, organizations, and other healthcare stakeholders interested in advancing JEDI principles.

# HOW TO USE THIS TOOL

The purpose of the Health Center Onboarding Checklist (HCOC) document is to provide a structure and a process for welcoming and integrating new hires at your organization. This resource is available as a Microsoft Word document to make it easier for HCs to customize it for their own needs. The document contains a checklist for all staff as well as sections for additional considerations for specific clinical staff.

The tool begins with a background on onboarding and its components including: why it is important, how it bridges recruitment and retention efforts, and how to apply the Justice, Equity, Diversity, and Inclusion (JEDI) lens. The next section is an editable template for onboarding including preparatory, orientation, and integration stages. The checklist includes sections for all staff and specific information for certain provider-types. Finally, there is a baseline list of documents required for onboarding. It is important to note that this resource has been created knowing that procedures, policies, and needs vary across HCs and communities. We encourage users to make edits, adjustments, and additions to best fit their environment. If parts of the document do not apply to your organization, simply delete or skip them.

If you have questions about this tool or would like to access our other resources and services, please contact the STAR² Center at info@chcworkforce.org; call us at 1-844-ACU-HIRE (1-844-228-4473); or visit our website at [www.chcworkforce.org](http://www.chcworkforce.org).

# ONBOARDING CHECKLIST – GENERAL/ALL STAFF

Staff Member Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Manager Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date of Hire: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## Preparatory

| **Process Monitor/Mentor/****Responsible Staff** | **Upon Hire Decision** | **Completed (date and by whom)** | **Prior to Start Date** | **Completed (date and by whom)** |
| --- | --- | --- | --- | --- |
| **Manager** | Create new hire schedule |  | Add/invite to existing meetings |  |
| Designate coworker/peer resource[[1]](#footnote-1) |  | Call to confirm start date and time, include first day expectations |  |
| Discuss relocation, if applicable |  | Create welcome packet |  |
| Identify HR point of contact |  | Inform department, HR, and IT |  |
|  |  | Schedule pertinent training |  |
|  |  | Email existing staff to introduce new hire, include professional background, hobbies, and interests if the new employee agrees |  |
| **Office Administrator** | Submit technology requests |  | Secure work area/station |  |
| Order passkeys, IDs, etc.  |  | Designate space |  |
|  |  | Furniture, supplies, etc. |  |
|  |  | Phone setup |  |
|  |  | Obtain nameplate, business cards, etc.  |  |
|  |  |  |  |
| **Human Resources** | Create personnel file |  | Confirm receipt of all recruitment docs |  |
|  |  | Confirm offer letter reception/acceptance |  |
|  |  | Confirm background check completion |  |
|  |  | Communicate organizational practices |  |
|  |  | Communicate organizational policies |  |
|  |  | Enroll in new hire briefing, webinar, etc. if applicable. Otherwise, schedule new hire briefing |  |
|  |  |  |  |
| **Technology** |  |  | Passkey order form |  |
|  |  | Temporary access for new hire |  |
|  |  | Software acquisition |  |
|  |  | Mobile device(s), if applicable |  |
|  |  | Hardware setup |  |
|  |  | Network setup |  |
|  |  |  |  |

## Orientation

| **Process Monitor/Mentor/****Responsible Staff** | **First Day(s)** | **Completed (date and by whom)** | **First Week(s)** | **Completed (date and by whom)** |
| --- | --- | --- | --- | --- |
| **Manager** | Welcome upon arrival |  | Ask how first weeks went |  |
| Guide to work station/office |  | Provide coaching to guide the new employee through questions and challenges |  |
| Deliver prepared welcome packet |  | Review training schedule |  |
| Discuss break/meal policies |  | Review all technology functionality |  |
| Discuss trial period, if applicable |  | Touch base with coworker/peer resource |  |
| Introduce to designated coworker/peer resource |  | Discuss current projects |  |
| Explain role/position in integrated care model |  | Go over HC Standard Operating Procedures (SOP) |  |
| Explain roles/positions of others on their care team and how to coordinate across the care team |  |  |  |
| Introduce Health Center Program & history |  |  |  |
| Discuss the health center's mission and patient population |  |  |  |
| Set up regular check-in meetings |  |  |  |
| **Office Administrator** | Provide company structure sheet |  |  |  |
| Provide company contact list access |  |  |  |
| Provide any maps, parking passes, etc. |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Human Resources** | Connect to complete any paperwork |  | Review company policies |  |
| Review portal |  | Ask employee how first weeks went |  |
| Sign offer letter, if necessary |  | Ask manager how first weeks went |  |
| Enroll in any benefits/services |  |  |  |
| Discuss company culture and work style[[2]](#footnote-2) |  |  |  |
| Discuss JEDI commitment, principles, and expectations |  |  |  |
|  |  |  |  |
| **Technology** | Review software, hardware, printers, etc. |  |  |  |
| Confirm email setup |  |  |  |
| Confirm phone setup |  |  |  |
| Review tech acceptable use policies |  |  |  |
| Assist with online directory setup |  |  |  |
| Provide access to company software programs |  |  |  |
|  |  |  |  |
| **Designated Coworker/Peer Resource** | Conduct tours |  | Periodic check-ins |  |
| Answer any questions |  |  |  |
| Offer to take to lunch |  |  |  |
| Make peer introductions |  |  |  |
|  |  |  |  |

## Integration

| **Process Monitor/Mentor/****Responsible Staff** | **End of First Three Months**  | **Completed (date and by whom)** | **End of First Six Months** | **Completed (date and by whom)** |
| --- | --- | --- | --- | --- |
| **Manager** | Assess progress |  | Performance review |  |
| Make any further introductions |  | Review short and long-term goals |  |
| Identify and address learning needs |  | Answer any questions |  |
| Make any responsibility adjustments |  | Schedule ongoing professional development |  |
| Performance check-in |  | Celebrate end of trial period status if applicable |  |
| Review short and long-term goals |  | Schedule annual performance review |  |
| Answer any questions |  | Answer any questions |  |
| Continue regular check-ins based on employee need |  | Reassess goals |  |
|  |  | Stay Interview (if not conducted by HR) |  |
|  |  |  |  |
|  |  |  |  |
| **Human Resources** | Performance check-in |  | Stay Interview (if not conducted by supervisor)[[3]](#footnote-3) |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

# ONBOARDING CHECKLIST – PROVIDER PERSONNEL-SPECIFIC ADDITIONS

Below are additional role-specific checklist items that should be used in conjunction with the above list. For the purposes of this list, “provider” refers to Physicians, Nurses, Physician Assistants, Advanced Practice Nurses, Behavioral Health Providers, Oral Health Providers, Vision Service Providers, Medical Assistants, Dental Assistants, and anyone else you think fits this description. Of course, like the rest of the document, feel free to add and subtract onboarding processes as appropriate to your organizational needs.

## Preparatory

**Upon Hire Decision**

* Manager
	+ Discuss productivity expectations
	+ Explain scheduling

**Prior to Start Date**

* Manager
	+ Explain credentialing process
* Office Administrator
	+ Order necessary specific medical equipment and clothing (e.g., lab coats)
* Human Resources
	+ Coordinate partner/family welcome, if applicable
* Technology
	+ Electronic Health Record (EHR)/Electronic Medical Record (EMR) setup

## Orientation

**First Day(s)**

* Manager
	+ Discuss Workflows - Review current workflows related to role for clarity or in the case that they have recently changed
	+ Discuss role-specific Standing Orders (Medical Director or Clinical Supervisor to go over)
	+ Coding and documentation - Specialty specific, EHR/EMR, tools
	+ Compliance
	+ Revenue Cycle Accountability (if applicable)

**First Week(s)**

* Manager
	+ Explain internal and external referrals within the integrated care model of the HC
	+ Train on warm handoffs

## Integration

**End of First Six Months**

* Manager
	+ Check in on continuing competency training/certifications

# DOCUMENTS REQUIRED FOR ONBOARDING

This is a list of documents to consider including in your onboarding processes. It is not meant to be complete or comprehensive and you are encouraged to add and subtract based on your organization’s protocols and needs.

## Legal Forms

* [W-4](https://www.irs.gov/forms-pubs/about-form-w-4)
* [I-9](https://www.uscis.gov/i-9)

## Job-Specific Documents

* Employment Offer Letter (should include job title, job description, start date, starting salary, direct manager, benefits eligibility, any contingencies such as passing a drug test and/or background check)
* Employment Contract (as applicable; should include general position responsibilities, wage/salary, employment duration, benefits, non-compete or non-disclosure agreements, if necessary)
* Emergency Contact Information (request from employee)

## Company-Specific Documents

* Employee Handbook
* Organizational Chart

## Payroll & Benefits Documents

* Direct Deposit Form
* Benefits Brochure(s) (including health insurance and retirement plans)
* Information on Additional Compensation Structure/Policies

# RESOURCES

**Association of Clinicians for the Underserved (ACU) STAR2 Center**

[Health Center Comprehensive Workforce Plan (CWP) Template](https://chcworkforce.org/web_links/hc-cwp/)

**Community Health Association of Mountain/Plains States (CHAMPS)**

[Orienting New Staff](http://champsonline.org/tools-products/rrresources/orienting-new-staff)

**National Association of Community Health Centers (NACHC)**

[Recruitment, Onboarding, & Retention: A Toolkit for Health Centers](https://www.nachc.org/wp-content/uploads/2015/06/NACHC-Recruitment-Onboarding-and-Retention-Toolkit-04092015.pdf)

**TRACIE Healthcare Emergency Preparedness Information Center, HHS**

[Health Care Facility Onboarding Checklist](https://files.asprtracie.hhs.gov/documents/healthcare-facility-onboarding-checklist-fillable-final.pdf)

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1. The coworker/peer resource should be a fellow employee who has been at the organization for at least a year (preferably) and who is not in a managerial/leadership position over the person being onboarded. They can serve as a buddy and a guide for the new employee to ask questions they might not feel comfortable asking a manager and/or to ensure the new employee has a guide integrating them into the social fabric of your organization. If you have a robust mentorship program at your organization, the coworker/peer resource can be the new hire’s mentor (as long as that mentor is not in a managerial position over the new hire). [↑](#footnote-ref-1)
2. Company culture is a set of values, expectations, and practices that guide your team each day. Defining your culture can help to foster a feeling of unity and ensure everyone is on the same page (Achievers, 2022). However, discussing and explaining your company culture can also run the risk of advocating for assimilation into that culture, as noted above. Visit [www.achievers.com/blog/words-describe-company-culture](http://www.achievers.com/blog/words-describe-company-culture) for a list of words that describe great company cultures that are not overly prescriptive. [↑](#footnote-ref-2)
3. It is recommended that Stay Interviews are conducted by direct managers (Finnegan, 2021), but some organizations find having HR conduct them is preferable. Visit [www.chcworkforce.org/?s=stay+interview](http://www.chcworkforce.org/?s=stay+interview) for the STAR2 Center’s resources on Stay Interviews. [↑](#footnote-ref-3)