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ONBOARDING



ONBOARDING YOUR NEW TEAM MEMBER.

Congratulations on hiring a valuable new team member who shares your commitment to patient care and practice growth.

Now, make their transition smooth and successful. Use this onboarding checklist to welcome them the right way—efficiently and confidently.

In this section you'll get:

- ☑ **Onboarding Checklist**
- ☑ **Resource Links:
Onboarding & Leadership**



ONBOARDING CHECKLIST

Before the First Day

- Send the formal offer in contract form with the official job description for the position so that all expectations are documented.
- Notify your office manager of the new employee's payment terms, benefits package, etc.
- Notify your team of your new hire.
- Send your welcome packet, including:
 - Who is their point of contact? Who do they report to?
 - Office holidays and closures.
 - Official job description clearly outlining schedule, work hours, and all responsibilities and expectations.

On the First Day

- Send an email to your team or host a standup to formally welcome your new team member.
- Meet with your office manager to complete any remaining employee paperwork and review practice policies.
- Update relevant marketing materials as needed (website, flyers, social media, etc.).
- Show your new hire their workspace.
- Discuss performance evaluations and how the employee will be assessed.