



MGMA Career Center

ONBOARDING CHECKLIST

NEW EMPLOYEE ONBOARDING CHECKLIST

- Employee: _____
- Position: _____
- Department: _____
- Start Date: _____

PRE-HIRE

- Call employee to confirm start date/time, parking, dress code, etc.
- Prepare employee's calendar for the first two weeks, scheduling regularly occurring meetings.
- Email department/team/functional area of the new hire. Include start date, employee's position and background.
- Set up meetings with key stakeholders for the employee's first few weeks.
- Arrange for lunch with appropriate staff for the first day and during first week.
- Arrange for a tour of your practice/facility.
- Put together a welcome packet from the department and include: job description, welcome letter, contact names and phone lists, mission/vision and values of the practice. If appropriate, include a campus map.



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- Clean the work area, and set up office space with supplies.
- Order office or work area keys.
- Order business cards and name plate.
- Add employee to relevant email lists.
- Set up technology equipment (computer, printer, phone) in advance.
- Schedule employee for New Employee Orientation session.
- Arrange pertinent trainings required for the job.

FIRST DAY

- Discuss the first week's schedule, and confirm required/recommended training(s).
- Review job description, outline of duties, and position expectations.
- Describe how employee's position fits in the department, and how the position/department contribute to the practice.
- Review hours of work, policies and procedures for overtime, use of vacation and sick time, holidays, etc.
- Introduce employee to others in the workplace.
- Take employee out to lunch.
- Give employee key(s) and/or building access card.
- Complete I-9 form within first three days of employment.
- Provide information on setting up voicemail and computer logins.



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FIRST WEEK

- Give employee his/her initial assignment.
- Debrief with employee after he/she attends initial meetings/training, and begins work on initial assignment.
- Review benefits package and other details regarding the practice.
- Discuss the goal-setting/performance review process and any probationary periods.

FIRST MONTH

- Schedule regular one-on-one meetings.
- Provide timely, meaningful ongoing feedback.
- Elicit feedback from the employee and be available to answer questions.
- Ensure employee has attended New Employee Orientation.