90-Day Onboarding Checklist

This checklist is designed to provide a structured and comprehensive onboarding experience. It is divided into three phases to ensure a smooth transition for new team members.

Employee Name: _____ **Start Date:** _____
Role/Position: _____ **Mentor:** _____

Phase 1: The First Week (Days 1-5) – Welcome & Foundation

This phase focuses on core administrative setup, introductions, and understanding the basics of the organization.

HR & Administration

- ☐ Complete General Employee Orientation
- ☐ Tour the main office and any fixed-site clinics
- ☐ Review timekeeping system and schedule
- ☐ Set up email and other communication systems
- ☐ Review key policies (Dress Code, Cell Phone, etc.)

Team & Culture

- ☐ Provide a department overview and explain the mobile program's mission
- ☐ Review the organizational chart and provide staff contact lists
- ☐ Introduce the new hire to all immediate team members
- ☐ Assign a mentor for peer support
- ☐ Review the job description and clarify core responsibilities

Phase 2: The First Month (Days 6-30) – Learning the Ropes

This phase is dedicated to hands-on learning of key systems, safety protocols, and core job functions.

Safety & Compliance

- ☐ Review Safety Event Management (SEM) reporting
- ☐ Explain employee injury reporting procedures

- ☐ Locate key safety resources (SDS Binders, First Aid Kits, AEDs)

- ☐ Complete initial HIPAA and patient privacy training

- ☐ Schedule or confirm CPR Certification

Clinical & Mobile Operations

- ☐ Shadow team members during patient check-in and registration

- ☐ Observe patient care and documentation in the EMR/EHR system

- ☐ Review common paperwork (consents, medical histories, etc.)

- ☐ Observe the full mobile unit setup and teardown process

- ☐ Review equipment sterilization and cleaning protocols

- ☐ Complete 20-Day New Employee Check-in Meeting

Phase 3: The First 90 Days (Days 31-90) – Gaining Independence

This final phase focuses on ensuring competency, setting performance goals, and preparing for the 90-day evaluation.

Advanced Training & Competency

- ☐ Attend required organizational trainings (e.g., Error Prevention, De-escalation)

- ☐ Complete any required CDL or driver training for the mobile unit

- ☐ Complete the role-specific competency checklist with a supervisor

- ☐ Begin participating in community outreach events (e.g., health fairs)

Performance & Growth

- ☐ Conduct employee rounding to gather feedback

- ☐ Set initial performance and development goals

- ☐ Review visual management and goal tracking boards

90-Day Evaluation

- ☐ Complete the 90-Day Performance Evaluation meeting