

Onboarding

1. Pre-Onboarding

It is important to recognize that the employee's pre-onboarding phase is the time where the employee shares a high level of excitement and motivation prior to starting their new role. During this period, it is crucial that the employer ensures that **communication** is a top priority!

1.1. What you need to know:

- Pre-onboarding starts from the time the Employee accepts employment until their start date.
- The pre-onboarding process is typically relatively short, but the specific length can vary.
- There are multiple advantages to start with a pre-onboarding process because of the following benefits (not limited to):

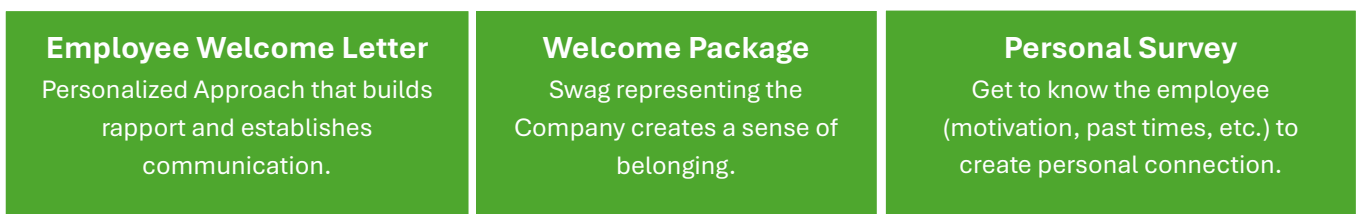


1.2. New Hire Onboarding Package:

A new hire Onboarding package allows the employer to clearly communicate their clinic's policies and procedures while extending a warm greeting to the new hire as it is crucial to ensure that the employee feels welcomed.

Spark Belonging in your Onboarding Experience!

- The package can be as formal or informal as the management team decides.
- An employer may choose to provide the onboarding package prior to the new employees start date or on their first day of employment.
- Each employer can create their own Onboarding Package based on their specific values and goals.



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Company Fun Facts

Greeting letter to set a familiar tone such as: facts about the clinic with the purpose of education and entertainment (values, office culture, history, annual events, employee engagement activities). This can help offer a 'human touch' to business.

2. Onboarding Checklist

Establishing a standardized onboarding checklist will help the employer to have:

- All required documentation for review and signature.
- Employee access to internal systems/software
- Pre-Determined Training Criteria for new employees.
- Much more!

 Please refer to [Onboarding Checklist](#) Template.

3. Employee File Record

An employee file contains several important documents related to an employee. Maintaining thorough and organized employment files will help you have access to the information, as needed. Some documents are standard for all employees where other documents relate specifically to the individual and what they have done at the company.

- An employee file can be a digital or physical way to store all the necessary documentation associated with each staff members employment records.

 Please refer to [Employee File Checklist](#) Template.

4. Preparing for an Employee's First Day

Welcoming a new employee to a team isn't just about simple introductions and onboarding training. Making an effort to welcome new employees to the organization can ensure they feel less stressed during the transition.

- Create a positive experience (This can help motivate new employees to establish professional relationships).
- Prepare adequately (Make them feel that you've made your best effort to welcome them).
- Encourage other colleagues to be involved (Benefits the entire team, as each member contributes to the team's objective).

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- Check-in with new team member regularly (To ensure they are adapting well).

✚ Please refer to [How to Welcome a New Employee](#).

5. New Employee Orientation & Training

When a new employee joins your organization, it is **crucial** to provide them with training specific to:



Providing training to employees is an important element of a successful organization. It offers the chance for employees to:



5.1. Role Specific Training

Training can take place in different shapes and forms, some examples include:

- **On-the-Job Training** - allows an employee to learn new skills with hands-on-experience from a more experienced staff member.
- **In-House Training** - Internal Training & Development Department provides in-house training program.
- **Mentoring** – A training program that pairs two individuals together and comprises one as the mentor with advanced skills in an area the mentee desires to learn about.
- **Technical Training** – Provides specific hard skills required for their job or profession. (e.g. Certification, EMR training sessions)
- **Personal Study** – Allows an employee to conduct their learning at their own pace and at the best time for them (e.g. Learning Management Portal).

5.2. Policies & Procedures Training

It is highly recommended to identify aspects of your workplace and operations that could benefit from clearly defined policies and procedures.

✚ Please refer to *Policies, Guides, and Procedures*.

Some employers may consider creating individual policies or an Employee Handbook to clearly outline their policies and procedures. Regardless of your clinic size or number of employees, an employee handbook is a useful resource and communication tool for both employers and employees.

5.2.1. Purpose of an Employee Handbook:



Introduce

Provide an **overview of your clinic** that highlights its internal structure and culture.



Understand

Help employees navigate **acceptable workplace practices** and behaviours.



Establish

Communicate **operating rules, procedures, and working conditions** for your clinic.

5.2.2. Tips for creating an Employee Handbook

- Keep the tone positive, professional and understandable.
- Avoid legal jargon or confusing terminology.
- Keep a copy of the employee handbook readily available to all employees.
- Retain employee acknowledgments in their personnel files.
- Include contact information for the clinic representative available to answer questions.
- Promptly communicate updates to employees.

Important: It is recommended to have your policies and procedures developed or reviewed by a Chartered Professional in Human Resources or a Legal Counsel to ensure that it complies with legislation.

6. Helpful Resources

Employee File Record

- [Keeping Personal Files](#)