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| **Staff Person’s Name:** | |  | | | **Position:** |  |
| **Start Date:** |  | | **Supervisor/Mentor:** |  | | |

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| **Item** | **Who** | **Date Sent/ Started** | **Date Completed** | **Notes** |
| **Pre-Hire/Contract:** | | | | |
| * Confirm relevant experience |  |  |  |  |
| * and necessary equipment |  |  |  |  |
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| **Upon Hire/Contract:** Send to new hire to review, prepare and sign. | | | | |
| * Obtain W4 & I9 or W9 (Track1099) |  |  |  |  |
| * Confidentiality Agreement |  |  |  |  |
| * Non-Compete |  |  |  |  |
| * Employee Handbook |  |  |  |  |
| * Background Check |  |  |  |  |
| * Communicate start date |  |  |  |  |
| * Send welcome email announcing to all staff |  |  |  |  |
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| **Pre-Start:** | | | | |
| * Set-up email address |  |  |  |  |
| * Order uniform or any equipment needed |  |  |  |  |
| * for Day 1. |  |  |  |  |
| * Determine training plan |  |  |  |  |
| * Assign mentors |  |  |  |  |
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| **Day 1: Initial Setup** | | | | |
| * Work Schedules, Requesting & Communicating Planned Time Off |  |  |  |  |
| * Timekeeping , (Dates, hours worked, etc.) |  |  |  |  |
| * Professionalism / Ethics / Etiquette |  |  |  |  |
| * Dress Code |  |  |  |  |
| * Training Expectations (Initial and Ongoing) |  |  |  |  |
| * Walkthrough software and equipment |  |  |  |  |
| * used daily, weekly, monthly. |  |  |  |  |
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| **Company and Job-Specific Orientation** | | | | |
| * History, Mission, and Culture |  |  |  |  |
| * Clientele Served |  |  |  |  |
| * Collaboration and Teamwork |  |  |  |  |
| * Benchmarks/Outcomes – productivity, satisfaction, quality |  |  |  |  |
| * Job Description, Responsibilities, and Performance Expectations (See last page) |  |  |  |  |
| * Complete Job-Specific Training Checklist (see below) |  |  |  |  |
| * Policies and Procedures |  |  |  |  |
| * Technology: Computers, Software |  |  |  |  |
| * Confidentiality / Safeguarding Information |  |  |  |  |
| * Documentation |  |  |  |  |
| * Quality Assurance |  |  |  |  |
| * Reporting Incidents |  |  |  |  |
| * Develop initial performance and development goals, including plans and timelines with staff person |  |  |  |  |

Create the Learning, Duties, Tasks and Responsibilities checklist: Insert the essential duties and responsibilities from the employee’s job description, as well as any other critical roles and responsibilities into the template below. Ensure that all duties that you expect them to execute for their specific position are included.

Best practice guidelines: Have reference materials available (i.e., training manual, binder, policies, “standard operating procedures,” protocols). When training the staff person, 1) explain the task, 2) demonstrate the task, 3) have the staff person practice the task, and 4) provide immediate, specific feedback about what they did well and opportunities to improve.

The staff person and supervisor/mentor should initial each item and note the date training was completed, and sign and date at the bottom once all duties have been trained.

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| **Learning, Duties, Tasks and Responsibilities** | **Staff Initials** | **Supervisor / Mentor Initials** | **Date Completed** |
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I understand the material presented to me. I agree to follow all policies, procedures, and protocols as explained to me.

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| **Staff Print** |  | **Signature** |  | **Date** |  |

I presented all the preceding information to the staff person whose signature appears above. I checked off each item that we discussed and marked “N/A” for items that were not applicable.

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| **Supervisor Print** |  | **Signature** |  | **Date** |  |