**Sample Staff On-Boarding Checklist**

Employee Name: [INSERT EMPLOYEE NAME]

Title: [INSERT EMPLOYEE JOB TITLE]

Start Date: [INSERT FIRST DAY OF WORK]

Issue the following items:

* Office Key
* Install EHR App to phone
* Connect EHR-connected email inbox to phone
* Ensure employee signed Non-Solicitation, Non-Disclosure, and Confidentiality Agreement on file
* Provide with office contact information (address, phone numbers, fax number, emails, etc)
* Provide copy of employee handbook and review office policies

Finances, Payroll and Pay Period:

* Time Sheet Provided (or Time Tracking Software)
* Set Up Direct Deposit
* First pay date: \_\_\_\_\_\_\_\_\_ (if direct deposit is not set up issue check)

Set up Benefits As Applicable:

* Health Insurance – effective \_\_\_\_\_ (date)
* Dental Insurance – effective \_\_\_\_\_ (date)
* Vision Insurance – effective \_\_\_\_\_ (date)
* Health Savings Account – effective \_\_\_\_\_ (date)
* Retirement Account – effective \_\_\_\_\_ (date)

Office Security:

* Provide passcode to the office entrance door
* Provide electronic access:
* Set-up email account
* Set-up access to Electronic Medical Software
* Set-up access for all business account, office supply accounts, passwords of other familiar accounts for software accounts

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Signature of person conducting: [INSERT NAME] Date: