



# Onboarding Packet Template

Department Name:

NEW EMPLOYEE NAME

DATE

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# Overview of the Onboarding Document Process

## Common New Staff Fears

- What's expected of me?
- Do I fit in here?
- Do I fit into the team?
- Do I know how to do my job?
- Do I know the priorities of my boss/organization?
- Do I know where things are?
- Who do I connect with for what I need?

## Process and Guiding Questions for Supervisors

How can this new staff member be fully supported and ramp up as fast as possible with the least amount of time/effort from the current team/organization?

### **List – Prioritize – Organize**

1. **LIST** - List all items/people in the categories below.

#### Foundational Knowledge – Relationships – Processes – Skills

- a. Foundational Knowledge – Theories, general knowledge, expectations, and responsibilities.
  - i. General knowledge of the organization
  - ii. Theories and terminology used by the team
  - iii. General knowledge of the physical space within the organization (parking, breakroom, watercooler, etc.)
  - iv. Job-specific responsibilities (tailored to each person)
  - v. Team expectations
- b. Relationships – People that this team member interacts with or should know in the organization.
  - i. Who does this new team member need, or who should they know to do their job/better understand the organization?
  - ii. Create a one-sentence description of these individual's roles as they relate to the team.
- c. Processes – Internal processes/systems/overhead – This section has the highest ROI by saving time with thorough training and reference materials.
  - i. Processes, systems, and general overhead tasks that are required to perform direct job duties (example: SOAP notes in the EMR).
  - ii. Process, systems, and general overhead tasks that are required to work within the organization's bureaucracy (example: timecards, billing codes, purchasing order, and vehicle check out).
  - iii. Goal: find or create asynchronous, self-study training materials and reference materials for this section. Video-based training is the most effective delivery method.

- d. Skills – Direct skills required to succeed in the position
  - i. List the major direct and trainable skills the staff member needs to demonstrate to perform their duties. These skills may be best developed using a peer mentorship model.
  - ii. Creating an observational checklist can be an effective tool.
2. **PRIORITIZE** – Prioritize each list into 3 separate sections – High, medium, and low priorities.
3. **ORGANIZE** – Organize each of the prioritized sections into training sections/modules.
  - a. Section/Module One – Theory/general knowledge, high priority people, and initiate high priority direct skills.
  - b. Section/Module Two – Continue direct skills, initiate high priority and medium priority processes, and medium priority relationships.
  - c. Section/Module Three – Finalize direct skills and the remaining low priority items in the remaining categories.

#### **Encourage – Follow-up – Update**

4. **ENCOURAGE** – Encourage the new staff member by setting an aggressive timeline for each module to be completed and supporting them with time to complete the work.
5. **FOLLOW-UP** – Schedule a follow-up with the new staff member and direct supervisor at the end of each section/module. Walkthrough each identified training item and ensure that it has been accomplished.
  - a. Some organizations find it best to re-task a missed learning item instead of giving the new staff member the answer.
6. **UPDATE** – Continually update the onboarding document based on feedback and changing organizational needs.
  - a. At the end of the final section/module, ask what else should be covered in the onboarding and what, if anything, should be removed that is not relevant?

## Considerations

It is best to standardize the onboarding packet per team or unit. Organizational onboarding and orientations are a good start but will lack the specifics needed to be successful in each team.

What can be done in an asynchronous, self-study learning format?

If prefabricated training is not currently available, how can our organization create training materials for self-study and reference? How can they be video-based?

In the foundation's section/modules it is recommended to:

1. Find or create asynchronous, self-study training materials for much of this section. Video-based trainings are optimal.
  - a. Theories and terminology used by the team
  - b. General knowledge of the organization
2. Conduct these tasks in person with the direct supervisor or hybrid with a peer and supervisor.
  - a. General knowledge of the physical space within the organization (parking, breakroom, watercooler, etc.)

- b. Job-specific responsibilities (tailored to each person)
- c. Team expectations

## Example Accompanying Documents

List of documents that should be included alongside this packet.

### Guiding Questions for Supervisors

- Which documents and reference materials should be attached or shared to make the onboarding process a success?
- What common errors continue to arise? Is there a training video/resource that addresses the process error?

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### Example:

The documents listed below will be sent to you electronically. If you have not received them, please inform your supervisor. All documents should be reviewed, signed (if applicable), and returned to the supervisor by Friday, Week 3, at 3 pm.

1. *Team expectations*
2. *Staff responsibilities*
3. *General employee orientation presentation*
4. *HIPAA training login document*
5. *Timecard instructions*
6. *Common timecard mistakes*
7. *Supervisor's goals*
8. *Purchasing and travel*
9. *Fiscal tips and hints*
10. *Online certification training A*
11. *Online certification training B*

# Onboarding - Example

## Week 1

### Public Health Overview WK 1

- Be able to describe what public health is to your supervisor.
- Be able to describe how ORGANIZATION is connected to other agencies. For an illustration, [insert link here](#)
- Learn the role of the ACCREDITATION BOARD (Public Health Accreditation Board [PHAB]).
- Northwest Center of Public Health Practice – Evidence Based Public Health Training series.
  - <http://www.nwcphp.org/training/opportunities/online-courses/evidence-based-public-health-training-series>
- Familiarize yourself with the 10 essential public health services.  
<http://ctb.ku.edu/en/table-of-contents/overview/models-for-community-health-and-development/ten-essential-public-health-services/main>

### STATE/FEDERAL Overview WK 1

- Familiarize yourself with STATE/FEDERAL.
- Learn who the contacts are at STATE/FEDERAL and what they do.
- Learn how we receive funding from STATE/FEDERAL and what it means to be STATE/FEDERAL funded.

### ORGANIZATION Overview WK 1

- Team expectations document
- Staff responsibilities document
- Review the Employee Orientation PowerPoint
- Orientation checklist (provided by HR upon hire)
- ORGANIZATION service overview (Insert Pathway)
- Familiarize yourself with ORGANIZATION's organizational structure (Insert Pathway).
- Supervisor or their designee will explain the following:
  - Recording Time
  - Mail Internal
  - Mail External
  - Clinic walking path
  - Dress code

## Subgrant Contracts WK 1-3

- KNOW EVERY ASPECT OF YOUR GRANT/DELIVERABLES
  - You are expected to be the expert on your grant and all its requirements.

## Positions/Staff to Know WK 1

- New Employee's Team – What do they do?
  - Program Manager
  - HES Sr.
  - HES
  - Administrative Assistant
  - ABC Coordinator
- ORGANIZATION Director –
- DEPARTMENT Director –
- Maintenance –
- Human Relations –
- Public Information Officer –
- Information Technology –
- Fiscal –

## Shared Drives WK 1

- Use the following drives instead of your local hard drive. These drives are more secure.
  - H drive – personal
    - Passwords – There is a passwords spreadsheet in your H drive to store all work-related passwords so that they are not on notes around your desk.
  - P drive – program shared drive (become familiar with every folder that relates to your programs).
  - O drive – This is open to everyone and is a good way to share projects with other divisions.

## Phone WK 1

- Update your message
- Contact the PIO or IT about updating your contact information on our website
- Etiquette, etc.

## Communication Platform WK 1

- Familiarize yourself with Communication Platform MS Teams. YouTube has sample videos on how to use the software.
- We use Teams for schedule updates to the rest of the group and to coordinate on projects.



## Vaccine Records

- Coordinate with the clinic to provide immunization records.

## Week 2

### Online Platform WK 2

- Familiarize yourself with:
  - Online Platform Home Tab – Specifically all folders on the left and right banners.
  - Reserving a conference room – ORGANIZATION Online Platform *INSERT PATHWAY*.
  - Creating an IT Request – ORGANIZATION Online Platform *INSERT PATHWAY*
  - Requesting Building and Vehicle maintenance – ORGANIZATION *INSERT PATHWAY*
  - ORGANIZATION Forms – ORGANIZATION Online Platform Home > *INSERT PATHWAY* The page contains most of the forms that you will need, including all purchasing and travel forms, letter head, and ORGANIZATION logos.
  - Vacation calendar – *INSERT PATHWAY* put all vacation, PTO, and known sick requests into the calendar.
  - Human Resources (HR) Section – Employee Handbook
    - ORGANIZATION Strategic Plan
    - Phone numbers
    - Organizational chart...

### TIME & Summary WK 2

- Learn how to submit your timecard
  - *INSERT VIDEO LINK HERE*
- Read: TIME common mistakes (see accompanying documents)
- Supervisor or their designee will explain the following:
  - Submit your timesheet *every other Friday*
  - Default time coding
  - Payroll report

## Week 3

### Storage Room & Maintenance WK 3

- Meet the outstanding maintenance personnel.
- Familiarize yourself with:
  - Storage room

### Purchase & Travel within ORGANIZATION WK 3

- Reference the travel and purchase manual.
- Contract agreements. Supervisor will review each of the following:
  - *MOU*
  - *Independent Contract Agreement*
  - *Subgrant*

### HIPAA WK 3

- Complete required HIPAA trainings (insert platform)
  - *(example TRAIN)*

### Budgets WK 3

- Supervisor or their designee will explain the following:
  - What-if analysis (budget projecting)
  - Vendor payments
  - Budget Blitz – a monthly budget meeting with supervisor
  - Budget projections

### Cars/Vehicles WK 3

- Supervisor or their designee will explain the following:
  - How to reserve cars
    - Vehicle orientation, dos and don'ts

### Design and Branding WK 3

- Familiarize yourself with ORGANIZATION branding guide, templates, and documents.
  - *INSERT PATHWAY*
    - *Online Platform > Master Forms > ORGANIZATION Brand Resources*

### Goals WK3

- Goal sheet

Employee \_\_\_\_\_ Date \_\_\_\_\_

Supervisor \_\_\_\_\_ Date \_\_\_\_\_

