

NEW HIRE ROUTING CHECKLIST

Employee Name: _____ Date: _____

Trainer Name: _____ Employee Start Date: _____

Forms	Date Completed	Trainer initials	Employee initials
Employee Status Sheet			
Personnel Data/Contact Sheet			
Email Form			
Payroll Schedule			
New Hire Packet			
Signed Job Description/Hat Write-up			
Health and Dental Benefit Description (if eligible)			
Complete the following: <i>For Clinical Employees</i>			
• Current Professional license			
• Health Screen			
• Drug Screen			
• Proof of current PPD			
• Proof of current HBV or HBV declination form			
• Current CPR card			
• Credentialing Information Sheet			
• NPI			
• CAQH			
• Therapist Bio Sheet			
Policies and Procedures	Date Completed	Trainer initials	Employee initials
Provide access to Comprehensive Policy and Procedure Manual			
Review the following key policies:			
• PTO			
• Pay to admin and clinical staff			
• Mileage Reimbursement			
• Continuing Education			
• Cell Phone and Texting Usage			
• Progressive Discipline			
• Performance Review			
• Documentation			
• Communication			
• Resignation			
Code of Conduct reviewed and signed			
Sexual Harassment Video/Policy Reviewed			
HIPAA Requirements Explained			
Test Completed for HIPAA Requirements			
Overview	Date Completed	Trainer initials	Employee initials
Review of history and philosophy of the practice			

Company vision and mission			
Explanation of management roles			
Proper use of email system (set up with company email)			
Communication System			
Efficiency System (Google Docs, Sheets, Cal)			
Organizing Board			
Stats and Stat Grids			
Management Action Plans			
Hatting and How to Write a Hat			
Being a Patient Care Advocate	Date Completed	Trainer initials	Employee initials
Phone etiquette			
Greeting patients			
Service alerts			
Levels of Exchange			
Give Me Five Drill			
The Cancellation/NS Policy			
How to Develop Rapport			
The Communication Cycle			
The Concept of Confront			
Success Stories	Date Completed	Trainer initials	Employee initials
Importance of a success story			
How to ask for a success story			
Explanation of forms and documents used			
MEG Academy	Date Completed	Trainer initials	Employee initials
I have finalized New Hire Orientation MEG Academy Training as part of my onboarding training, and I have complete understanding as to what is expected of me.			

Once Form is completed, please route to the Office Administrator

_____ Signature of Employee	_____ Date
_____ Signature of Trainer	_____ Date
_____ Signature of Office Administrator	_____ Date