ChecklistGuro

Healthcare Staff Onboarding Checklist: Training & Compliance

Pre-Employment Verification

Ensuring background checks, licenses, and credentials are verified before the employee's start date.

Employee ID

Enter a number...

Verification Status

☐ Pending

☐ Completed

☐ Conditional

Background Check Report

⬆ Upload File

Background Check Completion Date

Enter date...

License Verification Status

- ☐ Verified
- ☐ Pending
- ☐ Not Applicable

Copy of License/Certification

⤒ Upload File

HR & Legal Documentation

Completion of necessary HR forms, contracts, and legal acknowledgements.

Employee Full Name

Write something...

Employee ID

Write something...

Start Date

Enter date...

Acknowledgement of Employee Handbook

Write something...

Employee Signature

Employment Status (Full-time/Part-time/Contract)

☐ Full-time

☐ Part-time

☐ Contract

Copy of Driver's License (if applicable)

⬆ Upload File

IT Access & Security

Provisioning of system access, email accounts, and security training completion.

Operating System Access Level

☐ Standard User

☐ Administrator

Email Account Provisioned?

☐ Yes

☐ No

Multi-Factor Authentication (MFA) Enrollment Status

Enter a number...

Security Awareness Training Completed?

☐ Yes
☐ No

Last Password Reset Date

Enter date...

Screenshot of MFA setup verification

⬆ Upload File

Department-Specific Orientation

Introduction to the team, department workflows, and relevant equipment.

Introduction to Team Members

Write something...

Explanation of Department Workflow

Write something...

Department SOP Manual (Uploaded)

⬆ Upload File

Equipment Demonstration (Completed?)

☐ Yes

☐ No

Date of Equipment Training

Enter date...

Key Department Contacts & Roles

Write something...

HIPAA & Privacy Training

Completion of mandatory HIPAA training and acknowledgement of privacy policies.

Acknowledge HIPAA Regulations

Write something...

Confirm Understanding of Protected Health Information (PHI)

☐ Yes

☐ No

☐ Need Clarification

Identify Potential HIPAA Violations (Select all that apply)

- ☐ Unauthorized Disclosure of Patient Information
- ☐ Failure to Secure Patient Records
- ☐ Improper Disposal of Patient Documents
- ☐ Accessing Patient Records Without a Business Need
- ☐ Discussing Patient Information in Public Areas

Training Completion Date

Enter date...

Employee Signature - HIPAA Acknowledgment

Clinical Skills Training (if applicable)

Hands-on training and competency assessment for clinical roles.

Required Skills Assessments Completed

- ☐ Basic Life Support (BLS)
- ☐ Advanced Cardiac Life Support (ACLS)
- ☐ Pediatric Advanced Life Support (PALS)
- ☐ CPR
- ☐ Other (Specify)

Assessment Score (e.g., out of 100)

Enter a number...

Assessment Completion Date

Enter date...

Skill Level Observed (e.g., Needs Improvement, Meets Expectations, Exceeds Expectations)

☐ Needs Improvement

☐ Meets Expectations

☐ Exceeds Expectations

Trainer Comments/Observations

Write something...

Supporting Documentation (e.g., competency checklist)

⬆ Upload File

Safety & Emergency Procedures

Review of safety protocols, emergency response plans, and infection control measures.

Emergency Contact Information Reviewed?

☐ Yes

☐ No

Fire Safety Training Completed?

☐ Yes

☐ No

Hazard Communication (HazCom) Training Completed?

☐ Yes

☐ No

Last Fire Drill Participation Date

Enter date...

Description of Emergency Procedures Discussed

Write something...

Location of Emergency Equipment Familiarized?

☐ Yes

☐ No

Emergency Contact Phone Number

Enter a number...

Policy & Procedure Review

Familiarization with key hospital policies, procedures, and code of conduct.

Review and Acknowledge Hospital's Code of Conduct

Write something...

Review and Acknowledge Infection Control Policies

Write something...

Confirm Understanding of Reporting Procedures (e.g., Incident Reporting)

☐ Yes

☐ No

Confirm Understanding of Patient Rights and Responsibilities

☐ Yes

☐ No

Date of Policy Review Completion

Enter date...

Employee Signature (Acknowledging Policy Review)

Performance Expectations & Goals

Discussion of job responsibilities, performance metrics, and initial goals.

Job Description Summary Review

Write something...

Key Performance Indicators (KPIs) – Patient Satisfaction Score (Target)

Enter a number...

KPIs – Chart Completion Rate (Target)

Enter a number...

Primary Performance Goal (Choose one)

☐ Improve Patient Communication

☐ Enhance Charting Accuracy

☐ Increase Efficiency in Workflow

☐ Reduce Errors in Medication Administration

Specific Action Plan for Goal Achievement

Write something...

Date for Initial Goal Review

Enter date...

Employee Signature Acknowledging Goals

Feedback & Check-in Schedule

Establishment of regular feedback sessions and a timeline for check-ins.

30-Day Check-in Date

Enter date...

90-Day Check-in Date

Enter date...

6-Month Performance Review Date

Enter date...

Check-in Method (e.g., In-Person, Video Call, Email)

☐ In-Person

☐ Video Call

☐ Email

Number of Goals Reviewed During Check-in

Enter a number...

Summary of Key Discussion Points & Action Items

Write something...

Employee Signature Acknowledging Check-in

Overall Performance Impression (Initial)

☐ Exceeds Expectations

☐ Meets Expectations

☐ Needs Improvement