

New Leader Orientation and Onboarding

Focus Area	Specific Topics	Methodology	Person/Dept Responsible	Time Line	Who does HR work with to schedule?	Amount of Time Required
Human Resources	Day One Onboarding	One on one discussion	HR	day 1		
Access Community Health Centers	FQHC 101	One on one discussion	CEO	week 1	Deb	
	History of Access					
	Overview of relationship with UW Health & other community support					
	Community need for our services & opportunities for growth					
	Organizational Chart					
	Board of Directors/Board Committees					
Mission and Excellence	Purpose	One on one discussion	CSO & new leader's supervisor	week 2	Deb	
	Access values, behavioral standards and leader's role					
	Building relationship with direct reports					
	Rounding					
	Stoplight report					
	Supporting training and growth					
	Leadership training					
	LDI					
	LD					
	Employee training					
	EDI					
	Staff information sessions					
	Grateful leadership					
	Employee engagement teams					
	Pillar goals, Cascading goals, Pillar boards					
	Schedule for Capstone Summit					
	Positive communication standards					

Performance Management	Coaching, Compliment, Correction	One on one discussion	HR	week 3		
	Disciplinary Process					
	6 month conversations					
	12 month annual evaluation					
	Accountability meetings					
Finance & Accounting	Access financials	One on one discussion	Accounting Supervisor	week 3	Ada	
	Annual budgeting process					
	Growth over time & drivers of our expansion					
	Timecard management					
	CEU management					
	Leadership role					
Training	Position competencies	One on one discussion	TBD	week 4	Tracy	
	Training resources					
	IT related training					
	Safety training & annual calendar					
	Leadership role					
Policies & Procedures	FMLA administration	One on one discussion	HR Generalist	week 4		
	Recruiting process					
	Behavioral interviewing					
	Attendance policy					
	Other pertinent HR policies					
Community relations/ communications	Healthcare partners	One on one discussion	Development and Communications Director	week 5	Julia	
	Donors					
	Outreach					
	Events					
	Publications					
	Website					
	Social media					
Information Technology	How to make requests for UW	One on one	IT Coordinator & IT Support	week 5	Bill	
	How to make requests for hardware, software, phones					

Services	How to make security requests	discussion	IT Support Specialist	week 5	Jill	
	Role of internal staff					

Facilities	Department structure	One on one discussion	Director of Accounting	week 5	Ada	
	Facilities requests					
	Leadership role					
Shadow Functions	Call center/registration	Shadow	Registration and Scheduling Manager	First 30-60 days	Carmen	
	Revenue cycle overview	Attend Revenue Cycle meeting	Revenue Cycle Manager		Kris E.	
	Federal grant	One on one discussion	Grants Manager		Judy	
	Quality	Attend team meeting	Quality Director		Amanda	
	Medical – triage, care coordination, visit; rotation at each clinic location	Shadow	CMO		Amanda	
	Dental – visit	Shadow	CDO		Amanda	
	Behavioral Health – visit, care management; rotation at each clinic location	Shadow	CBHO		Amanda	
	Dodgeville	Shadow	Manager		Trina	
	Sun Prairie	Shadow	Manager		Mary	
	Celebrate Smiles	Shadow	Manager		Ruth	
	CRS	Shadow	Patient Services Manager		Amanda	
Policies and Procedures	Contract Signing Policy	Attest and one on one discussion	Risk Management and Safety Director	First 90 Days	Ada	
	All Emergency Preparedness Plans and Procedures					
	Event Reporting Policy					
	Credentialing & Privileging					
	Patient Dismissal Policy					
	Patient Concerns, Complaints and Grievances Procedure					
New Hire Breakfast	Breakfast to obtain feedback & discuss first 60 days. Will include Diversity Training.	Breakfast	HR	At 60 days		
Peer Support	1, 3, 6 month leadership breakfast/lunch with peers	Lunch	HR	TBD	New leader's supervisor	