

Employee Onboarding & Orientation Guide

Clinic Name

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# Welcome to Upstate’s **XXX** Clinic!

We are thrilled to welcome you to our team. In alignment with SUNY Upstate’s mission to enhance community health through education, biomedical research, and patient care, our goal in XXX is XXX. We value: XXX. Please use this guide, its checklists, and links to accompany your onboarding and guide you through your orientation process.

# Onboarding and Orientation Timeline

## Onboarding- Week 1 Checklist:

* Celebrate the first day – attend NEO session if applicable or report to **XXX** Clinic
* Set up your email signature.
* Log into our online Learning Management System (LMS), [Brightspace](https://mylearning.suny.edu/d2l/home/7462).
* [Link](https://support.microsoft.com/en-us/office/change-your-profile-picture-in-microsoft-teams-7a711943-9248-420e-b814-c071aa8d9b9c) to instructions Upload a profile photo in Teams.
* [Tip sheet for how to use Teams Chat](https://support.microsoft.com/en-us/office/first-things-to-know-about-chats-in-microsoft-teams-88ed0a06-6b59-43a3-8cf7-40c01f2f92f2).
* Meet with supervisor to review the following:
  + Performance Program/ Probationary Reports
  + Job Responsibilities
  + Establish frequency of team and 1:1 meeting
  + How to submit your bi weekly and/or monthly timesheet in Self-Serve (monthly)/Kronos (bi weekly)

\*\* If you clock in and out, find your designated timekeeping device.

* Confirm access to systems and drives with your manager (Microsoft Office Suite (Outlook, Teams, etc.), clinic specific Shared Drive(s), Epic department views, Self-Serve Orientation checklists).

## Orientation- First 14 days:

Complete Upstate and Clinic specific orientation. Work with your Clinic Leadership to understand job responsibilities and expectations within your role.

* Attend all [scheduled training courses](https://www.upstate.edu/pdl/intra/register/searchemp.php)
* Continue Brightspace courses.
* Shadow administrative, providers, nursing staff, and if appropriate the call center.
* Access [Orientation Checklist](https://selfserve.upstate.edu/ais/applications/orientation_chklists/) system to review all assigned PBO checklists with preceptor.
* Revisit how to submit your bi weekly and/or monthly timesheet in Self-Serve (monthly)/Kronos (bi weekly) with your manager.

\*\* If you clock in and out, find your designated timekeeping device.

* Discuss/review the following with your manager:
* Review [policies](#_Policies) and [procedures](#_Procedures_1).
* Systems Overview.
* Work hours.
* Job responsibilities and structure of the Clinic.
* Frequency of team and 1:1 biweekly meeting.
* Discuss performance and career conversations that will take place over the year.

## Orientation- First 30 days:

Shadow and work closely with your assigned employee champion/preceptor to grow in role responsibilities. Continue to learn about **XXX** Clinic’s culture.

* Meets with clinic leadership bi-weekly to review orientation progress.
* Precepts to rooming process, Epic in basket management responsibilities, etc.
* Complete Self-Serve Orientation Checklist system to review/sign off all assigned PBO checklists with preceptor (if applicable).

## Orientation- First 90 days:

* Discuss role, performance goals, and expectations.
* Discuss Upstate and Clinic goals.
* Discuss how performance will be evaluated throughout the year.

## First 6 Months:

* Working independently- acclimates to all components of your role and performance expectations.
* Assess personal comfort level with job responsibilities.
* Access Self-Serve Orientation Checklist system to sign off all outstanding PBO checklists assigned with preceptor and Supervisor (if applicable).
* Discuss plan for continuing orientation progression with manager.

## First 12 months:

* Continue regular meeting cadence with your clinic leadership to receive feedback and discuss your work.
* Discuss with your manager what you can expect during your one-year formal performance review/final probationary report. Topics to think about in preparation for performance review meeting:
  + What successes did I experience?
  + Where did I miss the mark, what did I learn from it, or what do I plan to do differently the next time?
  + What skills did you increase?
  + What skills have you identified to focus on building?
  + How did you feel about your first year?
  + Is this what you expected the job to be? If not, how was it different?
  + What obstacles did you encounter in the first year?
  + What do you like most about working at Upstate in **XXX** Clinic?
  + Do you feel that your work was recognized?
  + Any suggestions for improvement?
  + Is there anything your manager can do to help you achieve your professional goals?
  + In closing your first-year orientation process, please provide feedback to your manager on your experience.
* Deliver results and celebrate first year accomplishments. Consider professional goals for the following year.

# Policies

* [Adult Emergency Medical Response Teams: Code Blue, EMS- Policy CM E-15](https://upstate.ellucid.com/documents/view/3714)
* [Ambulatory Dress Code- Policy AMB A-01](https://upstate.ellucid.com/documents/view/98)
* [Confidentiality- Policy UW C-01](https://upstate.ellucid.com/documents/view/2942)
* [Domestic Violence and Workplace Policy- Policy UW V-01](https://upstate.ellucid.com/documents/view/3034)
* [Employee Assistance Program- Policy UW E-10](https://upstate.ellucid.com/documents/view/2969)
* [Equal Opportunity and Non-Discrimination Policy- Policy UW E-01](https://upstate.ellucid.com/documents/view/2961)
* [Harassment Prevention Policy](https://upstate.ellucid.com/documents/view/7223)
* [Uses and Disclosures of Protected Health Information- Policy P-38](https://upstate.ellucid.com/documents/view/1301)
* [Title IX- Policy UW T-05](https://upstate.ellucid.com/documents/view/11351)
* [The Upstate Code of Conduct- Policy UW C-02](https://upstate.ellucid.com/documents/view/2943)
* [Use of Chaperones During Sensitive Medical Examinations and Procedures- Policy CM C-54](https://upstate.ellucid.com/documents/view/12277)
* [Workplace Violence Prevention Policy UW H-01](https://upstate.ellucid.com/documents/view/7223)

# Procedures

* [Emergency Medical Response-Code Blue/EMS Procedure- PROC CM E-15A](https://upstate.ellucid.com/documents/view/4081)
* [Process for Reporting/Addressing Concerns in Ambulatory Care](https://www.upstate.edu/nursing/documents/process_for_reporting_and_addressing_concerns_in_ambulatory_care_072024_nl.pdf)
* Process for opening and closing clinic (link to clinic specific procedure here)

# [Additional Resources](#_Additional_Resources)

* [Ambulatory Clinical New Hire Onboarding Process Checklist](https://www.upstate.edu/nursing/documents/ambulatory_clinical_new_hire_onboarding_process_checklist_07132024.pdf)
* [Ambulatory Division Reporting Structure/Organization Chart](https://upstate.ellucid.com/documents/view/11293)
* [AskHR](https://solutions.upstate.edu/TDClient/650/HRPortal/Home/)- For all your basic HR Questions
* Clinic/Department Organizational Chart (link to clinic specific organizational chart here)
* [Employee Assistance Program (EAP) Brochure](https://www.upstate.edu/hr/document/intra/eap_brochure.pdf)
* OneUp- Coming 2025
* Phone list (link to clinic specific information here)
* Role Clarification- Clinical Staff
* Staff list (link to clinic specific information here)

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