

# New Employee Onboarding: SOP, Training & Job Aid

Cedar Hollow Family Clinic (fictional) | Complete onboarding package

**What's in this package:** (1) Standard Operating Procedure HR-004; (2) Employee Acknowledgment; (3) Front Desk Skills Checklist; (4) Microlearning module storyboard: Verifying Caller Identity; (5) Job Aid: Before You Share Patient Information.

## Part 1. Standard Operating Procedure HR-004: New Employee Onboarding

|                       |                  |                    |                                             |
|-----------------------|------------------|--------------------|---------------------------------------------|
| <b>SOP number</b>     | HR-004           | <b>Version</b>     | 1.0                                         |
| <b>Owner</b>          | Practice Manager | <b>Approved by</b> | Medical Director                            |
| <b>Effective date</b> | January 4, 2027  | <b>Next review</b> | January 2028, or after any related incident |

### 1. Purpose

To make sure every new employee is set up, trained, and able to protect patient information before working independently, and that the clinic keeps a complete record of that training.

### 2. Scope

All new employees, including full-time, part-time, temporary, and returning staff. Contracted providers follow this SOP for the steps marked with an asterisk (\*).

### 3. Definitions

| Term             | Meaning in this SOP                                                                                   |
|------------------|-------------------------------------------------------------------------------------------------------|
| Onboarding buddy | An experienced employee assigned to guide the new employee during the first 90 days                   |
| Independent work | Performing job duties, including answering patient phone lines, without a buddy present               |
| Release form     | The patient's signed form listing people who may receive information about their care                 |
| Two identifiers  | Two pieces of information that confirm identity, such as full name plus date of birth or home address |

### 4. Roles and responsibilities

| Role             | Responsible for                                                                                         |
|------------------|---------------------------------------------------------------------------------------------------------|
| Practice Manager | Owns this SOP; prepares accounts and equipment; leads Day 1, Day 30, and Day 90 meetings; keeps records |
| Onboarding buddy | Guides shadowing; completes the Front Desk Skills Checklist; signs off on independent work              |
| New employee     | Completes paperwork, modules, and shadowing on schedule; asks questions                                 |
| Medical Director | Approves this SOP and any changes to it                                                                 |

### 5. Procedure

#### 5.1 Before Day 1 (Practice Manager)

- Send a welcome email at least three business days before the start date with start time, parking, dress code, and who to ask for.
- Request system accounts (scheduling, records, email) so they are active on Day 1.\*

- Assign an onboarding buddy and schedule the first shadowing shift.
- Prepare badge, keys, and a printed copy of the job aid.

#### **5.2 Day 1 (Practice Manager)**

- Complete employment paperwork and confirm emergency contact information.
- Issue badge and keys; record serial numbers on the equipment log.
- Walk through the building, including emergency exits and where patient records are kept.
- Review this SOP and the clinic privacy policy. The employee signs the Acknowledgment (Part 2).\*

#### **5.3 Days 1 to 3 (New employee)**

- Complete the microlearning modules *Privacy Basics* and *Verifying Caller Identity*.\*
- Score 100% on each knowledge check. Retakes are allowed; the Practice Manager reviews any question missed twice.

#### **5.4 Week 1 (Onboarding buddy)**

- New employee shadows the buddy for at least 8 hours, including at least 2 hours on patient phone lines.
- Buddy completes the Front Desk Skills Checklist (Part 3) as each skill is demonstrated.
- The employee may not answer patient phone lines alone until the buddy has signed off on caller verification.

#### **5.5 Day 30 and Day 90 (Practice Manager)**

- Day 30: check-in meeting to cover questions, gaps, and any additional training needed. Record outcomes in the personnel file.
- Day 90: final review. Confirm the checklist is complete and file all onboarding records.

### **6. Records**

Signed acknowledgments, completed checklists, and module completion records are filed in the personnel record and kept according to the clinic's records retention schedule.

### **7. Related documents**

- Clinic Privacy Policy (POL-002)
- Release of Information Procedure (SOP-PR-007)
- Microlearning: Privacy Basics; Verifying Caller Identity
- Job Aid: Before You Share Patient Information

### **8. Revision history**

| Version | Date            | Change  | Approved by      |
|---------|-----------------|---------|------------------|
| 1.0     | January 4, 2027 | New SOP | Medical Director |

## Part 2. Employee Acknowledgment

I have read SOP HR-004 and the Clinic Privacy Policy. I understand that I may not answer patient phone lines or share patient information until I have completed the required training and my onboarding buddy has signed off on caller verification. I know who to ask when I am unsure.

|                              |       |             |       |
|------------------------------|-------|-------------|-------|
| <b>Employee name (print)</b> | _____ | <b>Date</b> | _____ |
| <b>Employee signature</b>    | _____ | <b>Date</b> | _____ |
| <b>Practice Manager</b>      | _____ | <b>Date</b> | _____ |

## Part 3. Front Desk Skills Checklist

*The onboarding buddy initials each skill after the new employee demonstrates it correctly at least twice.*

| Skill                                                      | Demonstrated (date) | Buddy initials |
|------------------------------------------------------------|---------------------|----------------|
| Check in a patient and confirm two identifiers             |                     |                |
| Schedule, reschedule, and cancel an appointment            |                     |                |
| Verify a caller's identity before sharing any information  |                     |                |
| Check a release form before speaking with a third party    |                     |                |
| Decline to share information using the approved script     |                     |                |
| Leave a voicemail with no patient details                  |                     |                |
| Document a phone call in the patient chart                 |                     |                |
| Escalate an unclear request to the Practice Manager        |                     |                |
| Keep screens and paperwork out of view of the waiting area |                     |                |

|                                                   |       |             |       |
|---------------------------------------------------|-------|-------------|-------|
| <b>Buddy sign-off: ready for independent work</b> | _____ | <b>Date</b> | _____ |
|---------------------------------------------------|-------|-------------|-------|

## Part 4. Microlearning Module: Verifying Caller Identity

|                     |                                               |
|---------------------|-----------------------------------------------|
| <b>Length</b>       | About 5 minutes, self-paced, mobile-friendly  |
| <b>Audience</b>     | Front-desk staff and new clinical staff       |
| <b>Prerequisite</b> | Privacy Basics module                         |
| <b>Completion</b>   | 100% on the knowledge check (retakes allowed) |

### Learning objectives

After this module, you will be able to:

- Confirm a caller's identity using two identifiers before sharing any patient information.
- Check the release form before speaking with a family member or other third party.
- Decline a request politely while giving the caller a path forward.
- Share only the minimum information a request needs.

### Storyboard

| Screen               | Learner sees                                                                                    | Interaction                           |
|----------------------|-------------------------------------------------------------------------------------------------|---------------------------------------|
| 1. Hook              | "Most privacy mistakes at a front desk start with a friendly phone call."                       | Tap to continue                       |
| 2. The rule          | Two identifiers, every time, before sharing anything. Even for regulars.                        | Tap to reveal examples of identifiers |
| 3. Scenario          | Dana calls: "I'm Marcus Reed's sister. What time is his appointment tomorrow? I'm driving him." | Choose what to do first (Question 1)  |
| 4. Branch            | Learner sees the release form. Dana is not listed.                                              | Choose what to say (Question 2)       |
| 5. Model answer      | Audio and text of the approved script, delivered warmly.                                        | Replay option                         |
| 6. Twist             | Marcus calls himself the next day.                                                              | Choose how to verify (Question 3)     |
| 7. Minimum necessary | Marcus's employer calls to confirm he had an appointment.                                       | Question 4                            |
| 8. Voicemail         | No answer when calling a patient back.                                                          | Question 5                            |
| 9. Wrap-up           | Three takeaways and a link to the job aid.                                                      | Download job aid                      |

### Knowledge check

#### 1. Dana knows Marcus's full name and says she's his sister. What should you do first?

- A) Give the time; she already knows his name.  
B) Check Marcus's release form to see if Dana is listed.  
C) Ask Dana for her date of birth.

**Answer: B.** Knowing a patient's name is not permission. The release form tells you who the patient has authorized. Dana's own date of birth tells you nothing about Marcus's consent.

**2. Dana is not on the release form. What do you say?**

- A) "I'm sorry, I can't share that. Marcus can call us, or he can add you to his release form."
- B) "He's coming in sometime tomorrow morning."
- C) "I'll make an exception since you're family."

*Answer: A. Even a partial answer confirms he is a patient. Offer a path forward instead.*

**3. Marcus calls himself. How do you verify it's him?**

- A) Ask him to confirm two identifiers, such as date of birth and home address.
- B) Recognize his voice.
- C) Ask for his name only.

*Answer: A. Two identifiers, every time, even for regulars.*

**4. Marcus's employer calls asking whether he had an appointment Tuesday. Marcus listed the employer on his release form for "attendance verification only." What can you share?**

- A) That he attended on Tuesday.
- B) That he attended and why.
- C) Nothing, because it's an employer.

*Answer: A. Share only what the release allows and the request needs. The reason for a visit is not part of attendance.*

**5. You call Marcus back and reach his voicemail. What do you leave?**

- A) "Hi Marcus, your lab results are in."
- B) Your first name, the clinic name, and the callback number.
- C) Nothing; just try again later.

*Answer: B. Others may hear the message. Never leave patient details on voicemail; do leave enough for him to call back.*

## Part 5. Job Aid: Before You Share Patient Information

*Keep at every front-desk workstation. One page, one task.*

| Step | Do this                                                                                          | If not                                                                       |
|------|--------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------|
| 1    | Ask for two identifiers: full name plus date of birth or home address.                           | Do not share anything. Offer to call the patient back at the number on file. |
| 2    | Caller is not the patient? Open the release form in the patient's chart.                         | Not listed: use the script below.                                            |
| 3    | Share only what the request needs (for example, appointment time, not the reason for the visit). | Unsure? Put the caller on hold and ask the Practice Manager.                 |
| 4    | Note the call in the chart: who called, what you shared.                                         | Missed it? Add the note as soon as you remember.                             |

### When you can't share: say this

*"I'm sorry, I'm not able to share any information about that. The patient is welcome to call us directly, or they can add you to their release form at their next visit."*

### Never

- Confirm or deny that someone is a patient to an unverified caller.
- Leave patient details on voicemail beyond your name, the clinic name, and a callback number.
- Read the schedule aloud where people in the waiting area can hear.

*Sample only. Training content must be reviewed against the clinic's own policies and applicable regulations before use. Organization, people, and procedures are fictional.*