



KPCA
IMPROVING KENTUCKY'S CAPACITY TO CARE

2026
Annual
Conference

Beyond Orientation: Developing an Onboarding Program That Sticks

Suzanne Speer, ACU



Beyond Orientation: Developing an Onboarding Program That Sticks

Kentucky PCA Annual Conference
September 30, 2026

Suzanne Speer, VP of Workforce Development



Learn More About ACU



Access to Care & Clinician Support

Recruitment & Retention

National Health
Service Corps

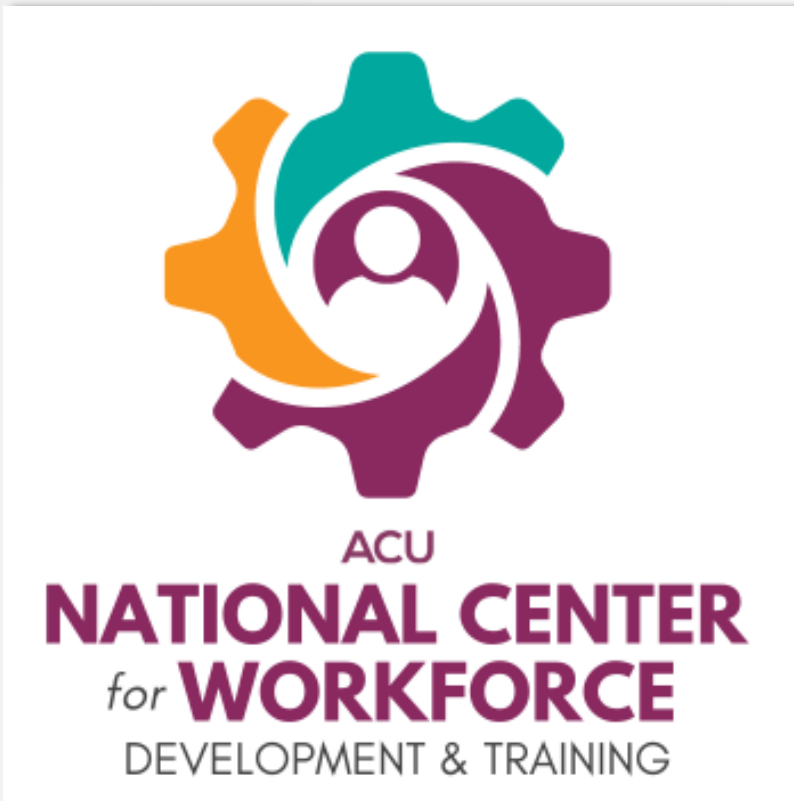
Resources

Training

Networking

www.clinicians.org

Who We Are



- Comprehensive training, technical assistance, and consultation in all aspects of healthcare workforce development
- Serves as the hub for a variety of ongoing ACU workforce initiatives

What is onboarding?



“the process in which new employees gain the knowledge and skills they need to become effective members of an organization ”

Source: [Cambridge Dictionary](#)

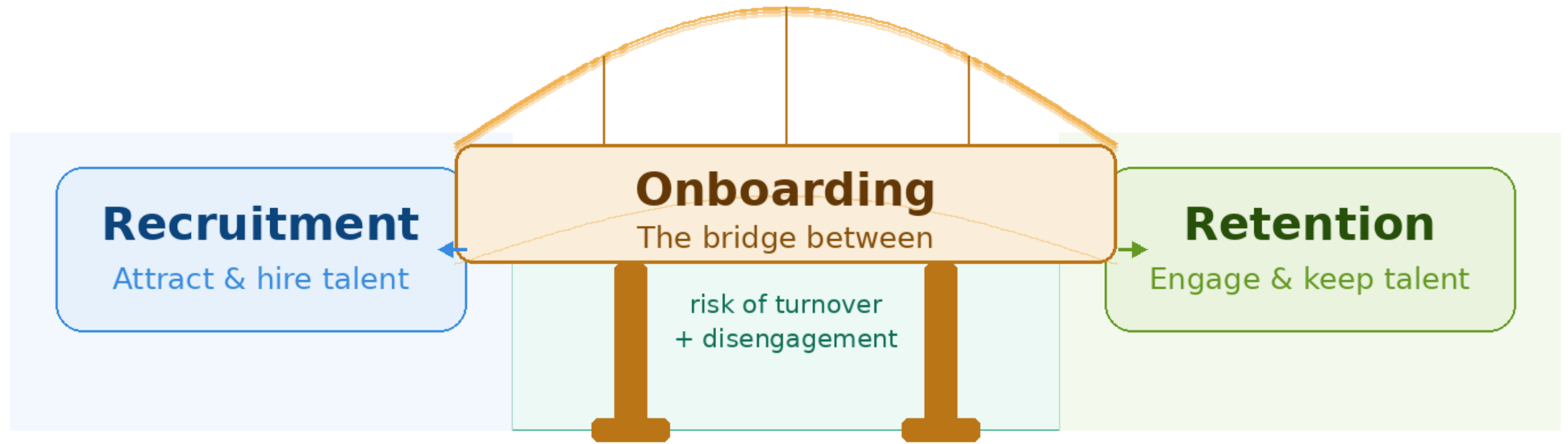
ONBOARDING IS THE BRIDGE



Retention

Recruitment





Why Onboarding?



Approximately 30% of new hires quit their job within the first 90 days of employment.

Why Onboarding?



Turnover is expensive!

The cost of replacing an employee ranges from 50% to 200% of an employee's annual salary, depending on their role.

Source: [*Staffing Support Specialists*](#)



Why Onboarding?



Increases
Employee
Engagement

Sets clear
expectations

Productivity
occurs more
quickly

Increases
Retention

ORIENTATION



ONBOARDING

The 4 C's of Onboarding

Compliance

- Teaching basic legal and policy related rules and regulations

Clarification

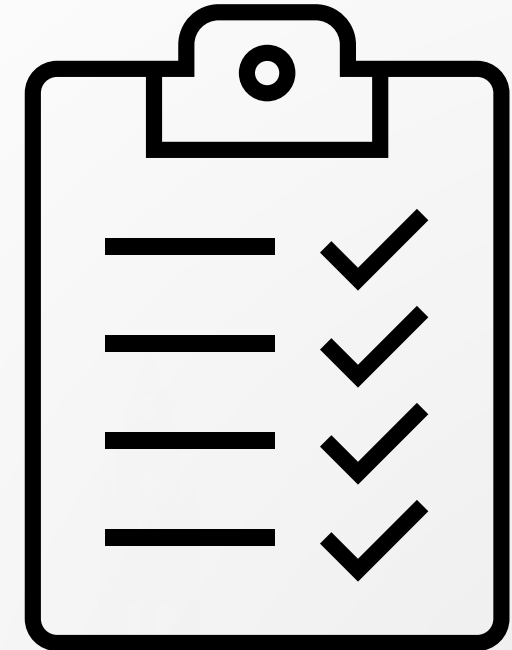
- Understanding expectations, roles and responsibilities

Company (Organizational Work Environment)

- Vision, mission statement

Connection

- Interpersonal relationships, community connection



Challenges of the 4 C's



Compliance

Tracking compliance can be a challenge when the organization is large and across many different locations.

Clarification

Challenges may arise when roles are evolving, requiring ongoing clarification between individual roles and goals.

Culture

Culture is caught, not just taught. Create genuine opportunities for new employees to experience your values in action, rather than simply presenting them on a slide.

Connection

Connecting staff across locations or those in virtual setting can be challenging. Facilitating meaningful relationships should ensure that there are opportunities for social interaction.

Onboarding Activities



May involve:

- **Building relationships** with administration, leadership, direct reports, and other staff
- Understanding **organizational environment/structure**
- **Orienting** to facilities, computer system, EMR, policies and procedures, etc.
- **Introducing** new hire to the community
- **Credentialing, licensing, etc.** (for providers)

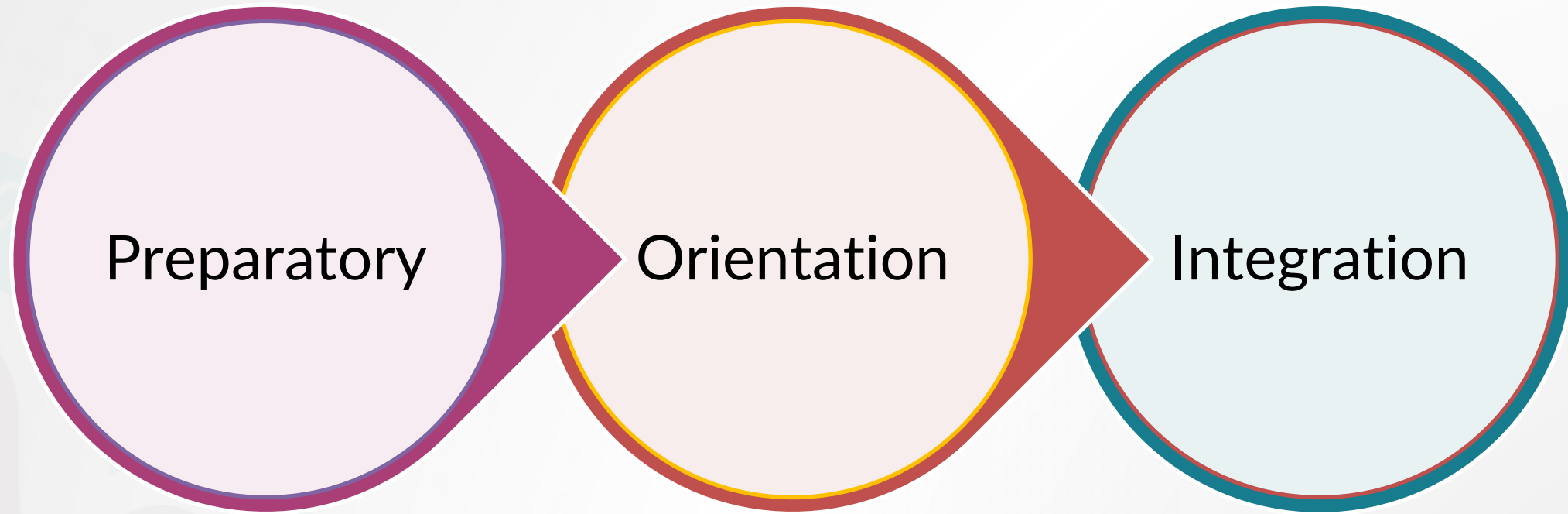
Onboarding: Ask Yourself



- What impression do you want a new hire to walk away with after the first day?
- What do new employees need to know?
- How are you going to introduce your new hire to the organization's work environment?
- What is everyone's role (HR, managers, co-workers)?
- What are the goals for your new hire?
- How long will onboarding last?
- How will you assess and measure the effectiveness of your onboarding program?

Source: [*SHRM New Employee Onboarding Guide*](#)

Creating an Onboarding Plan



Creating an Onboarding Plan



- Provide a **structure** and a **process** for welcoming new hires to your organization
- Create a **checklist for all staff**, as well as sections for additional **considerations for specific clinical staff**
- When crafting your plan, **consider the following questions** for each onboarding activity:
 - **Who** will be responsible for ensuring this component of your new hire's onboarding is completed?
 - **When** should the planning for this onboarding activity take place? Before the new employee's start date? Within their first two weeks?
 - **When** should the new hire or responsible staff person aim to complete this activity?

Be thorough – *more detail is better than less!*

Be clear about expectations – *what constitutes success?*

Preparatory



Process Monitor/Mentor/ Responsible Staff	Upon Hire Decision	Completed (date and by whom)	Prior to Start Date	Completed (date and by whom)
Manager	Create new hire schedule		Add/invite to existing meetings	
	Designate coworker resource		Call to confirm start date and time, include first day expectations	
	Discuss relocation, if applicable		Create welcome packet	
	Identify HR point of contact		Inform department, HR, and IT	
			Schedule pertinent training	
			Email existing staff to introduce new hire, include professional background, hobbies, and interests if the new employee agrees	
Office Administrator	Submit technology requests		Secure work area/station	
	Order passkeys, IDs, etc.		Designate space	
			Furniture, supplies, etc.	
			Phone setup	
			Obtain nameplate, business cards, etc.	
Human Resources	Create personnel file		Confirm receipt of all recruitment docs	
			Confirm offer letter reception/acceptance	
			Confirm background check completion	
			Communicate organizational practices	
			Communicate organizational policies	
			Enroll in new hire briefing, webinar, etc. if applicable. Otherwise, schedule new hire briefing	
Technology			Passkey order form	
			Temporary access for new hire	
			Software acquisition	
			Mobile device(s), if applicable	
			Hardware setup	
			Network setup	

Orientation

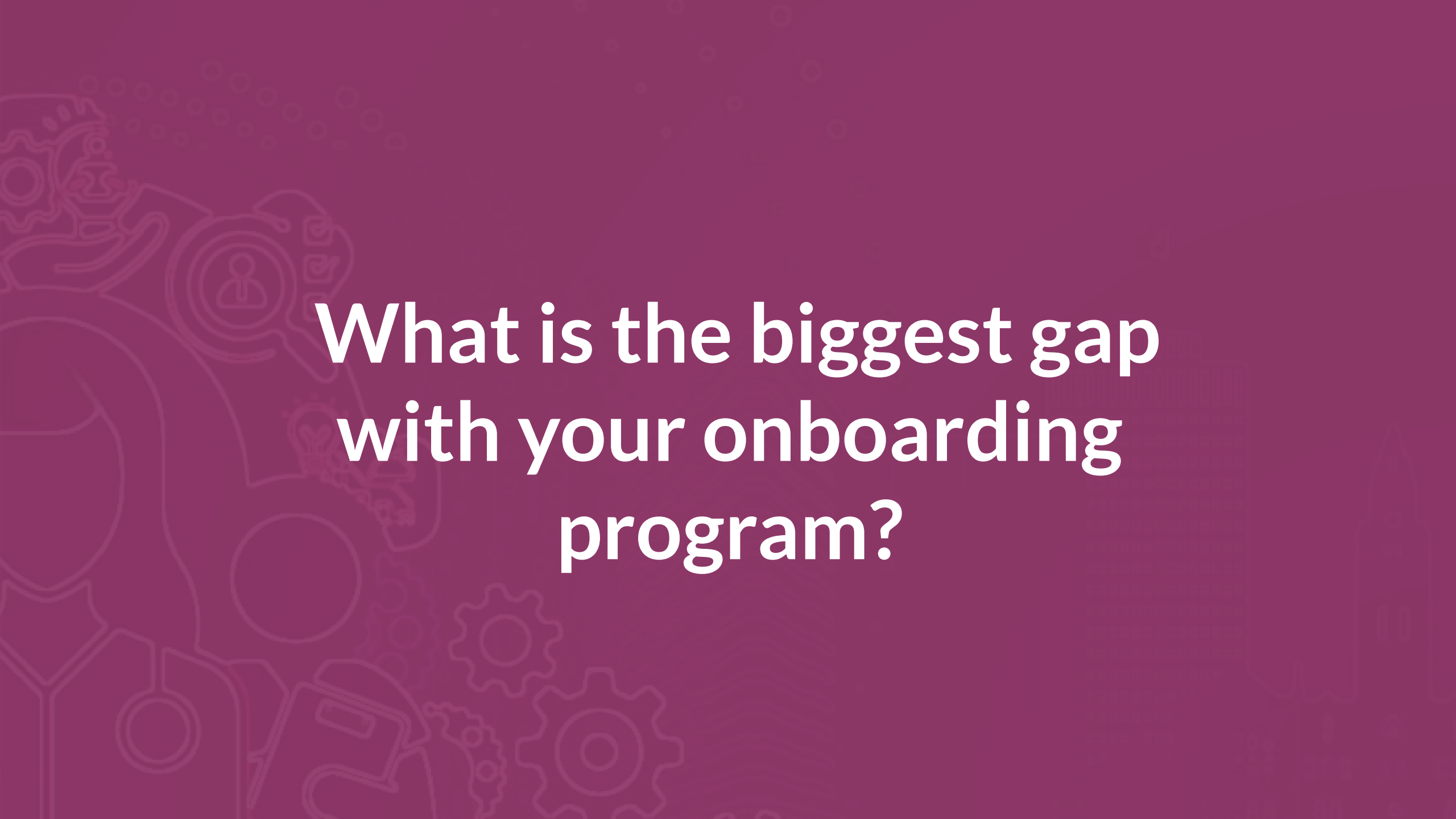


Process Monitor/Mentor/ Responsible Staff	First Day(s)	Completed (date and by whom)	First Week(s)	Completed (date and by whom)
Manager	Welcome upon arrival		Ask how first weeks went	
	Guide to work station/office		Provide support to guide the new employee through questions and challenges	
	Deliver prepared welcome packet		Review training schedule	
	Discuss break/meal policies		Review all technology functionality	
	Discuss trial period, if applicable		Touch base with coworker/colleague resource	
	Introduce to designated coworker/colleague resource		Discuss current projects	
	Explain role/position in team-based care model		Go over HC Standard Operating Procedures (SOP)	
	Explain roles/positions of others on the care team and how to coordinate across the care team			
	Introduce Health Center Program & history			
	Discuss the health center's mission statement and patient population			
	Set up regular check-in meetings			
Office Administrator	Provide company structure sheet			
	Provide company contact list access			
	Provide any maps, parking passes, etc.			
Human Resources	Connect to complete any paperwork		Review company policies	
	Review portal		Ask employee how first weeks went	
	Sign offer letter, if necessary		Ask manager how first weeks went	
	Enroll in any benefits/services			
	Discuss organizational environment and work style			
	Discuss organizational expectations			
Technology	Review software, hardware, printers, etc.			
	Confirm email setup			
	Confirm phone setup			
	Review tech acceptable use policies			
	Assist with online directory setup			
	Provide access to company software programs			
Designated Coworker/Peer Resource	Conduct tours		Periodic check-ins	
	Answer any questions			
	Offer to take to lunch			
	Make peer introductions			

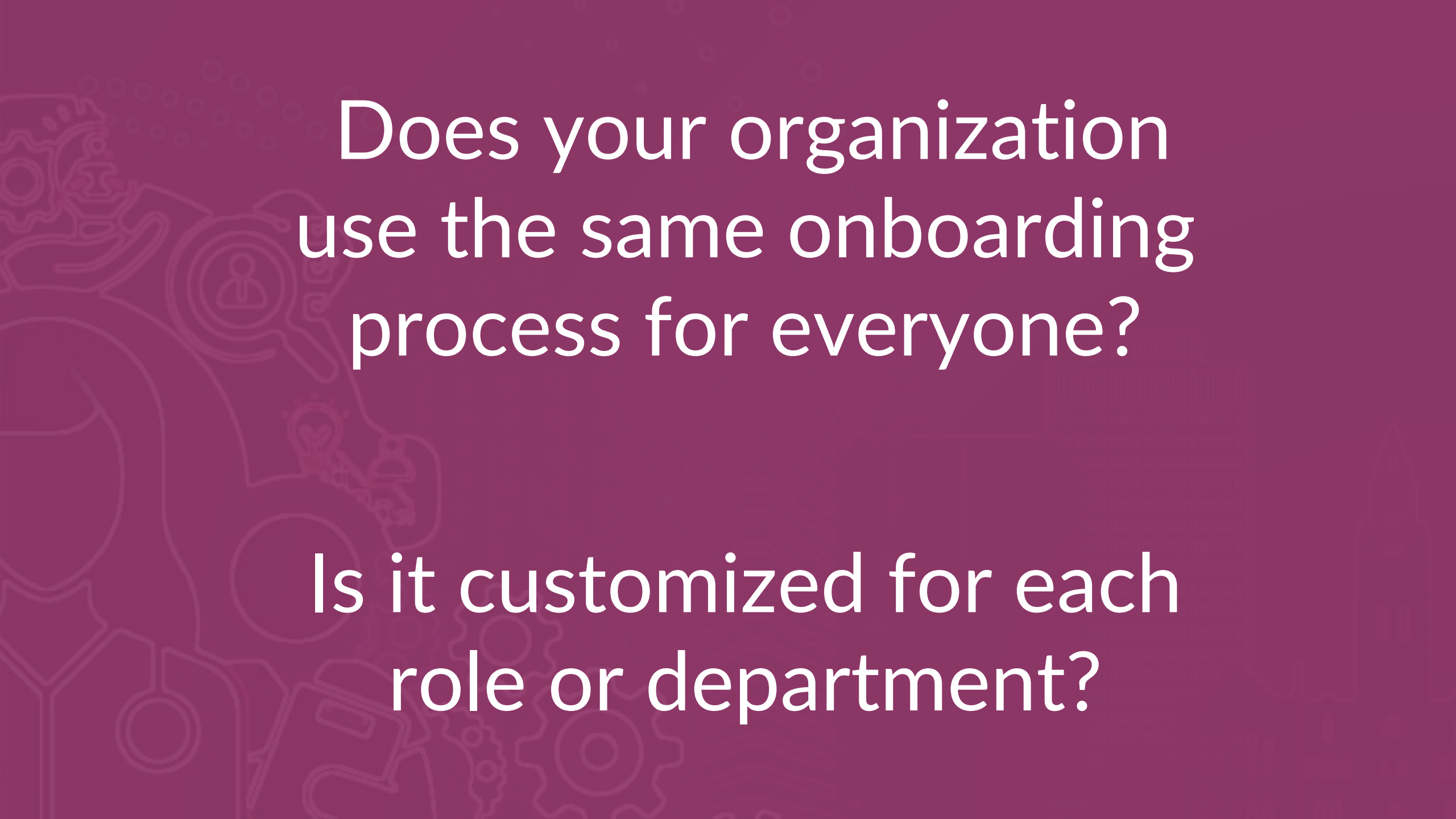
Integration



Process Monitor/Mentor/ Responsible Staff	End of First Three Months	Completed (date and by whom)	End of First Six Months	Completed (date and by whom)
Manager	Assess progress		Performance review	
	Make any further introductions		Review short and long-term goals	
	Identify and address learning needs		Answer any questions	
	Make any responsibility adjustments		Schedule ongoing professional development	
	Performance check-in		Celebrate end of trial period status if applicable	
	Review short and long-term goals		Schedule annual performance review	
	Answer any questions		Answer any questions	
	Continue regular check-ins based on employee need		Reassess goals	
			Stay Interview (if not conducted by HR)	
Human Resources	Performance check-in		Stay Interview (if not conducted by supervisor)	

The background is a solid dark purple color. Overlaid on this are faint, white line-art icons. On the left, there is a large profile of a person's head and shoulders. To the right of the person's head are several circular icons: one with a person silhouette, one with a lightbulb, and one with a gear. Below these are more gears and a folder icon. On the far right, there is a faint outline of a city skyline with several buildings of varying heights.

**What is the biggest gap
with your onboarding
program?**



Does your organization
use the same onboarding
process for everyone?

Is it customized for each
role or department?

Role-Specific Onboarding



- Consider the new staff person's role as you plan their onboarding process
- Some elements of the onboarding process will be universal to all employees, while other elements may only be relevant for certain positions
- Create onboarding programs that are tailored to meet the needs of new hires
 - Customization strengthens retention and ensures individuals succeed in their new roles

Role-Specific Onboarding: Providers



Orientation

First Day(s)

- Manager
 - Discuss workflows - Review current workflows related to role for clarity or in the case that they have recently changed
 - Discuss role-specific Standing Orders (Medical Director or Clinical Supervisor to go over)
 - Coding and documentation - Specialty specific, EHR/EMR, tools
 - Compliance
 - Revenue Cycle Accountability (if applicable)

First Week(s)

- Manager
 - Explain internal and external referrals within the integrated care model of the HC
 - Train on warm handoffs

Integration

End of First Six Months

- Manager
 - Check in on continuing competency training/certifications



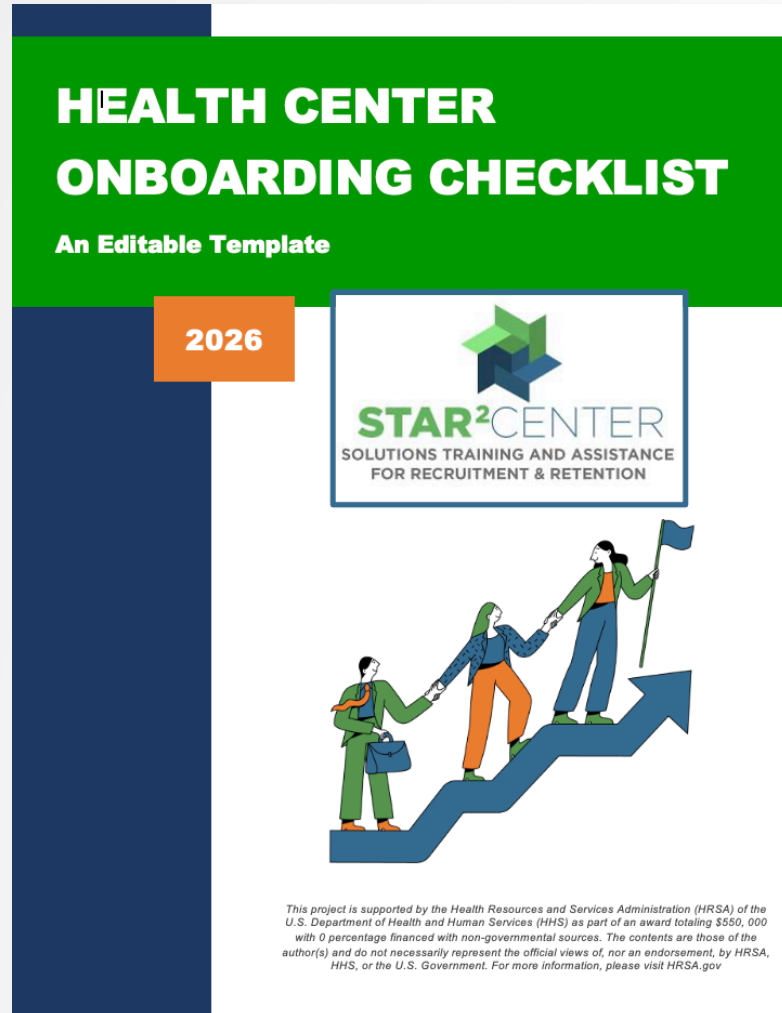
Final Thoughts

Creating an Onboarding Plan



- Designate a **coworker** to support new hires through the onboarding process
 - Someone who has been at the organization for at least a year (preferably)
 - Someone who is **not** in a managerial or leadership position over the person being onboarded
 - Serve as a buddy and guide to introduce the new hire to the social fabric of the organization
 - If you have a robust mentorship program, the coworker/colleague can be the new hire's mentor
- Defining your **organizational work environment** can help ensure everyone is on the same page

Onboarding Resource



- Newly Updated!
- Fully Customizable
- Checklist for Preparatory, Orientation and Integration Phases

Source: clinicians.org/nationalcenter/health-center-onboarding-checklist/

Upcoming Trainings: Registration Open!



- October: Manager Training Series
- Monthly Leadership Labs

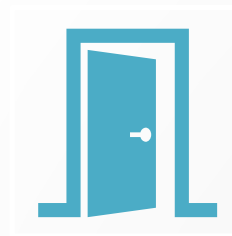
Upcoming Trainings: Registration Coming Soon!



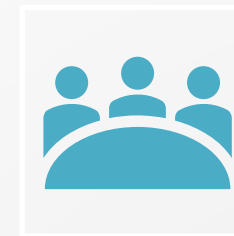
Mentoring and Coaching
Toolkit Intro Webinar



Mentoring and Coaching
Cohort



Onboarding Cohort



Workforce Symposium:
March 16-17, 2027

QUESTIONS



We'd love to hear from you!



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