

## Onboarding Schedule/Checklist: Therapist

*Pre Start-Date*

Item	Assigned
<input type="checkbox"/> Attach login information to onboarding spreadsheet	Human Resources
<ul style="list-style-type: none"> <li>- HCSI</li> </ul>	Human Resources
<ul style="list-style-type: none"> <li>- Stepworks University</li> </ul>	Human Resources
<ul style="list-style-type: none"> <li>- Stepworks EMR</li> </ul>	Human Resources
<ul style="list-style-type: none"> <li>- Email Information (if applicable)</li> </ul>	Human Resources
<ul style="list-style-type: none"> <li>- Podio Login Information</li> </ul>	Human Resources
<input type="checkbox"/> Send employee Zenefits Onboarding Email	Human Resources
<input type="checkbox"/> Email new employee with the following:	Supervisor
<ul style="list-style-type: none"> <li>- Welcome Letter</li> </ul>	Supervisor
<ul style="list-style-type: none"> <li>- Start Date</li> </ul>	Supervisor
<ul style="list-style-type: none"> <li>- Dress Code</li> </ul>	Supervisor
<ul style="list-style-type: none"> <li>- Work Hours or Shift</li> </ul>	Supervisor
<ul style="list-style-type: none"> <li>- Reminder to bring two forms of ID</li> </ul>	Supervisor
<ul style="list-style-type: none"> <li>- Reminder to bring copies of degrees &amp; certifications</li> </ul>	Supervisor

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*Start-Date*

Item	Assigned
<input type="checkbox"/> Introduce Employee to Staff	Supervisor
<input type="checkbox"/> Review Time Clock Procedures	Supervisor
<input type="checkbox"/> Assign door keys and Security Codes	Supervisor
<input type="checkbox"/> Tour of Facility	Supervisor
<input type="checkbox"/> HR Documentation (see checklist)	Supervisor
<input type="checkbox"/> Verify I-9	Supervisor
<input type="checkbox"/> Review Login Credentials	Supervisor
- Timeclock Pin Number	Supervisor
- Stepworks EMR	Supervisor
- Podio	Supervisor
- HCSI	Supervisor
- Stepworks University	Supervisor
<input type="checkbox"/> Urine Drug Screen	Supervisor
<input type="checkbox"/> Review Residential Schedule	Supervisor
<input type="checkbox"/> Review Mission Statement	Supervisor
<input type="checkbox"/> Establish appointment for fingerprinting	Employee
<input type="checkbox"/> TB Hep B (question if needed)	Supervisor
<input type="checkbox"/> HCSI Training Modules (upload signed certificate to chart)	Employee & Supervisor

## Onboarding Schedule/Checklist: Therapist

Day 02

Item	Assigned
<input type="checkbox"/> Review Stepworks' Mission, Values, and Principles	Supervisor
<input type="checkbox"/> Review Employee's Role in Treatment	Supervisor
<input type="checkbox"/> Describe levels of care (i.e. residential, detox, partial, IOP)	Supervisor
<input type="checkbox"/> Teaming a client	Supervisor
<input type="checkbox"/> Review Visitation Procedures	Supervisor
<input type="checkbox"/> Review Reporting of Abuse and Neglect Requirements	Supervisor
<input type="checkbox"/> Stepworks University Assignments	Employee
- Training Manual	Employee
- Organizational Policies	Employee
- Personnel Manual	Employee
- Residential Operations	Employee
- Employee Orientation	Employee
<input type="checkbox"/> Administration of TB Test	Nurse
<input type="checkbox"/> Administration of Hepatitis B Titers	Nurse

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Day 03

Item	Assigned
<input type="checkbox"/> Review Stepworks EMR	Supervisor
<input type="checkbox"/> Review Documentation Standards	Supervisor
<input type="checkbox"/> Review Clinical Timeline	Supervisor
<input type="checkbox"/> Review Step One packet	Supervisor
<input type="checkbox"/> Review Supervision (individual and group requirements)	Supervisor
<input type="checkbox"/> Review Family Sessions	Supervisor
<input type="checkbox"/> Review Discharges	Supervisor
<input type="checkbox"/> Review Choices & Consequences	Supervisor
<input type="checkbox"/> Stepworks University Assignments	Employee
- Uncompleted Modules	Employee

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*Day 04*

Item	Assigned
<input type="checkbox"/> Shadow Therapist	Therapist
<input type="checkbox"/> Stepworks University Assignments	Employee
<input type="checkbox"/> - Uncompleted Modules	Employee
<input type="checkbox"/> Complete Competency Exam	Supervisor

## Onboarding Schedule/Checklist: Therapist

Day 05

Item	Assigned
<input type="checkbox"/> Schedule CPR Training <sup>1</sup>	Supervisor
<input type="checkbox"/> Schedule Crisis Intervention Training	Supervisor
<input type="checkbox"/> Stepworks University Assignments	Employee
<input type="checkbox"/> - Uncompleted Modules	Employee
<input type="checkbox"/> Job Shadowing	Therapist

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<sup>1</sup> CPR and Crisis Intervention will occur within 60 days of hire or as soon as a class becomes available.