EMPLOYEE NEW HIRE CHECKLIST

Below is a list of things you will need/need to do (from) a newly hired employee. Some things may not be required depending on the state you are in, so check your state guidelines.

- [ ] Provide a contract and have it signed
- [ ] Get a copy of their license
- [ ] Get a copy of their resume with your business listed as current employer
- [ ] Have them fill out a W4 for taxes
- [ ] If you offer incentives like IRA, bonuses, health insurance, get what you need from them to set that up
- [ ] Add them to your malpractice insurance
- [ ] Add them to your workman's comp
- [ ] Get a professional photo and bio from them
- [ ] Add photo and bio to your website
- [ ] Get them business cards and marketing materials
- [ ] Add them to you EHR system
- [ ] Add them to your phone extensions and work email

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- ☐ Have them get an NPI number and CAQH (if you take insurance)
- ☐ Give them a w9 (if you take insurance)
- ☐ Add them to your payroll account
- ☐ Go over office policies and procedures with employee (preferably right before they start actually seeing clients, so they don't forget. Examples are how the intake process goes, where to put paperwork, how scheduling works, the importance of notes and timeliness, how payments are taken from clients, etc.
- ☐ Discuss marketing and networking for their ideal clients (where to go, how to market or network, etc.)
- ☐ Discuss CPT codes, diagnoses (esp. if using insurance) and rules around it (for example, insurances do not allow seeing a client for two hours in a day, or some insurances do not allow family sessions).
- ☐ Explain who or how they can discuss difficult/legal cases.