Time Saver: Develop an Employee Orientation Manual

Taking the time to develop an employee orientation manual today can save valuable time later.

By Vicki Guin

When was the last time you felt you had enough time to train a new employee? If the answer is “seldom to never,” you are not alone. Far too often practices find themselves hiring out of need, and unfortunately, the need is so immediate that they do not feel they can afford the training time necessary to prepare the newly hired staff adequately. Subsequently, practices fall into the “See One, Do One, Teach One” training program. This can lead to frustration for all parties. However, hiring and training doesn’t need to be as difficult as it often is. In fact, establishing a formalized training process actually can reduce the time necessary to acclimate new hires to their positions.

Major Elements of a Manual

Although each position will require specific training and materials, some training resources are appropriate for all staff members. One such multi-purpose resource is a comprehensive employee orientation manual. Below is a description of what a practice might want to include in the employee orientation manual:

Introduction/welcome page: Formally welcoming new employees to a practice sets the stage for exceptional customer service. Write this section of the manual in a manner that mirrors how you would like the employees to welcome patients into the practice.

Mission statement: It is important for an employee to understand the purpose and expectations of the practice. Include your formal mission statement, the philosophy of the physician(s), and the vital role that each staff member plays in achieving established goals. If you don’t have a mission statement, take the time and effort to generate one. Gather your core leaders during your next strategic planning session and identify the key words or philosophy that drives your practice and draft a mission statement for circulation through your team. Understand that a mission statement is dynamic and can change, but having an underlying philosophy can keep your employees motivated. A mission statement will help get new employees off to a good start.

History/background: It is important for new hires to understand who you are and how you got here. A brief description of how and where your practice started and how many years you have been in business will make them aware of the journey. A firm understanding of the practice background will help new employees understand how much effort and planning has gone into building the practice to its current stature. It will also help set realistic expectations and goals that will ensure that progress and growth continue for the future.

Current practice: This section should provide an overview of the practice today. Depending on the length of time you have been in practice, you may want to combine this section with the background discussion noted above. This section should include answers to questions such as:

• How many providers do you have? Make sure to explain that “providers” does not mean just “doctors.”
• What are the practice’s specialties? While you do not want to limit what you offer, it is most likely that some procedures are more prominent than
others. Make sure to give all procedures their due, but focus on the procedures that are the foundation of your success.

• Is there anything different/special about your location? Location is important to any business; make sure new employees understand the advantages that your location offers your patients. For instance, is parking readily available? Are you close to the central business district? Are you near shopping areas?

• Do you have your own ambulatory surgical center or surgical suite? New employees must understand the impact that a surgery center can have on a practice and its standing in the marketplace. Such a facility can elevate a practice to the top, especially if it is well-established and modern.

• Is there anything different or special about the practice environment? Make sure a new employee is aware of any unique elements.

Providers: Who are the practice’s providers, and what are their credentials? A new employee might not have a full understanding that a provider is not always a physician. In this section, include a brief biography of each of your providers (physicians, physician assistants, nurse practitioners, registered nurses, aestheticians), as well as a photo. Each biography should include the following information, where relevant:

• Board certification or licensing
• Years in practice
• Training
• Society or group membership
• Types and numbers of procedures?
• Specific technique
• Trainer or educator?

Services: If you have been putting off developing a complete written menu of services, now is the time to formalize this important document. Include the most common treatments and procedures. Provide a brief description of each to familiarize the new staff member with the services you provide. It is helpful to explain which providers perform which services. Below is a laser hair removal example:

• Laser hair removal: Our licensed medical aestheticians are trained to perform laser hair removal. We use the latest technology in laser energy to stunt your hair follicles, which reduces or can even eliminate further hair growth on the upper lip, chin, underarms, back, chest, abdomen, arms, bikini, and legs. It is a simple, no-down-time procedure, and the patient can return to normal activities immediately. Results are best with multiple treatments. We offer these treatments individually, or the patient may purchase a package of treatments. Procedure performed by (insert names).

Organization: It is helpful if employees understand who their teammates are and what roles they play. A description of each position and who currently holds the position will help new staff members understand how and where they fit in the “big picture.” You might want to include an organizational chart as well to provide a visual depiction of your business.

• The practice manager is responsible for the
day-to-day operations of the business and reports directly to Dr. (insert name). (S)he oversees the staffing needs of the office and ensures that all business units are performing effectively and efficiently.

**Business structure:** It is important that new employees know how the practices functions. It is likely your practice has obvious business units. Explain these to new employees so they can see how the units work closely together:

- The front office is responsible for greeting patients, answering phones and checking patients in and out. The positions in this area have a direct working supervisor to ensure that the processes are in place for a smooth flow.

- The back office is responsible for the medical care of the patient. The medical assistants are responsible for rooming patients and assisting the providers. They are also directly involved with patient education and the returning of patient calls.

- The business office handles the financial activity of the office, including patient and insurance billing, as well as paying the expenses that the office incurs.

**Patient forms:** You might also want to include a sample of the different patient forms used by the practice. This will help to familiarize the new employee with the protocols of the office and educate them on the practice requirements set forth for a patient to receive care. Include all common forms so new employees will be familiar with them, even if they do not use them routinely.

**Conclusion**

Whether hiring to staff a growing practice or because of unexpected turnover, all practices must train new employees. It is important to set the appropriate expectations from the very beginning. Formalizing a training program based on an up-to-date employee orientation manual can present a practice as an organized entity with established processes and procedures in place and expedite the acclimation of new hires.