

# Hiring Toolkit

## For Medical Practices in North Carolina

# We Are Hiring

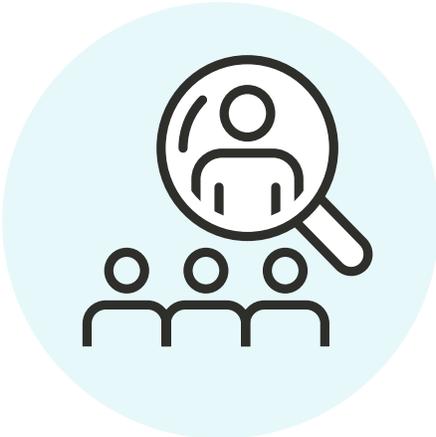


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# Introduction

We recognize the importance of having resources available to guide you in all aspects of recruiting and onboarding in order to keep your practice running smoothly.

This toolkit includes checklists, templates, forms, and best practices that you may find useful in managing your medical practice.



Checklists



Forms



Templates



Best Practices

Disclaimer: Please note that the information provided, while authoritative, is not guaranteed for accuracy and legality. Please seek legal assistance, or assistance from State, Federal, or International governmental resources, to make certain your legal interpretation and decisions are correct for your location. This information is for guidance, ideas, and assistance.

# Job Description

The first step in the process of hiring the right candidate for your open position is to create a job description that accurately describes the responsibilities and skills required to perform the job.

## Medical Assistant Job Description Example

### Job Summary

As a Medical Assistant, you will utilize your empathic and passionate nature to perform a combination of administrative and clinical tasks within a medical practice setting. You will work alongside an incredible team to care for the immediate medical needs of our patients. You will work in a dynamic environment, where you are considered a pivotal member of a team that works to exceed practice goals, foster teamwork, and keeps the facility organized and operating efficiently.

### Job Responsibilities

#### Administrative duties

- Managing office telephone systems, including answering calls and returning messages
- Scheduling patient appointments and maintaining communication to confirm future appointments
- Documenting patients' medical information, including medical history and health insurance information
- Performing data entry tasks to document patient records within facility databases and maintaining patient files
- Coordinating daily office activities, greeting patients and checking patients in and out for their appointments

#### Clinical duties

- Recording patients' vital signs, documenting notes and changes in medical conditions
- Taking tissue and fluid samples and sending them in for laboratory analysis
- Prepping exam rooms for clinical procedures and assisting practitioners with patient care
- Assisting clinicians during routine checkups, outpatient procedures and other physical exams
- Monitoring and documenting patient symptoms for clinicians' review during clinical exams
- Providing compassionate patient support and care, attention and assistance during office visits
- Preparing and administering medications under the direction of supervising physicians

### Job Skills & Qualifications

#### Required:

- High school diploma
- Certification and licensure (be specific)
- Excellent verbal, written and interpersonal communication skills
- Physical ability to perform job-related duties

#### Preferred:

- Mastery of basic clinical skills
- Degree (if applicable)

# Job Description

## Job Description Template

**Job Description Title**

**Company Name**

**Job Title**

**General Job Description**

**Job Responsibilities (skills, knowledge, abilities)**

**Required Qualifications**

**Preferred Qualifications**

Approved By:	Print Name:	Signature:
Date Approved:		
Date Last Reviewed:		
Last Reviewed By:		

# Job Description

**A good job description will help you and the applicant in the following ways:**

- Helps attract the right candidate for your open position
- Describes the required skills, knowledge and abilities needed to perform the job
- Serves as a basis for setting performance expectations, evaluations, and job training



# Recruitment

Attracting the right candidate is the focus when advertising a job opening. Using various forms of advertising will maximize your reach and thus help you fill your open position sooner. Job boards, social media platforms, and professional organization websites are just a few examples of how to get the word out about your open position.

## Where do You Advertise your Job Posting?

- Job boards
- Professional Organization Websites
- Social Media
- Community Colleges
- Employee Referrals / Word of Mouth

### Job Boards

#### Indeed

[www.indeed.com](http://www.indeed.com)

#### Monster

[www.monster.com](http://www.monster.com)

#### Zip Recruiter

[www.ziprecruiter.com](http://www.ziprecruiter.com)

#### LinkedIn

[www.business.linkedin.com](http://www.business.linkedin.com)

#### Career Builder

[www.careerbuilder.com](http://www.careerbuilder.com)

#### Vivian

[www.vivian.com](http://www.vivian.com)



# Recruitment

## Social Media

Social media is an excellent and free way to advertise your job openings. Facebook, Twitter, and LinkedIn are all social media sites that allow you to advertise your job openings. You can create a free company page or account on each site in order to engage with passive candidates. This is a great way to get visibility for your company but may not generate a large pool of candidates. LinkedIn offers a couple of fee-for-service packages called LinkedIn Recruiter, and LinkedIn Recruiter Lite and is a very popular service among recruiters to recruit top talent.

Explore various social media options:

### Facebook

[www.facebook.com](http://www.facebook.com)

### LinkedIn

[www.linkedin.com](http://www.linkedin.com)

### Twitter

[www.twitter.com](http://www.twitter.com)

## How to Recruit Employees on Social Media

Add your job posting directly on your company's social media site (such as Facebook, Twitter, or LinkedIn) and then route candidates to your corporate website to provide further information and an application form.

Social Media accounts have a lot of customization options for you to better manage your company profile. Be sure to explore those options to make the most of your recruitment efforts.

Referrals work great when recruiting through social media sites. Job advertisements can easily be shared by employees to their social networks to attract more interest and visibility for your opening. Candidates are more likely to be a good cultural fit when they know who their potential coworkers are and they have had an opportunity to review your website to learn more about the job.

Recruiting using social media includes networking with candidates and building relationships with potential future hires. After you create your company profile, you should have at least one page manager who responds to people's questions and engages with them on a regular basis.

It's also a good idea to join relevant social media groups to engage with your ideal applicants. Specific groups on Facebook include Recruiters online and The Facebook Corporate Recruiters Network, where you can get recruiting tips and share best practices.

# Recruitment

## Professional Organizations

Some professional organizations will allow you to post hard to fill positions, such as physicians, nurse practitioners, or physician assistants to their respective professional organization site for a fee. In addition, if the professional organization has a newsletter they may include your position in their publication that is distributed to their membership. You may check with each organization to see what their policy is for job advertisement.

### Professional Organization Websites:

[www.jobstars.com/healthcare-professional-associations-organizations/](http://www.jobstars.com/healthcare-professional-associations-organizations/)

## Healthcare Professional Associations and Organizations

- **American Academy of Ambulatory Care Nursing (AAACN)** is a unifying community for registered nurses in all ambulatory care settings.
- **American Academy of Dermatology (AAD)** is the largest, most influential, and most representative group of dermatologists in the United States.
- **American Academy of Ophthalmology (AAO)** is the world's largest association of eye physicians and surgeons.
- **American Academy of PAs (AAPA)** is the only national professional association that represents all PAs across all medical settings and specialties in all 50 states.
- **American Academy of Pediatrics (AAP)** is a professional membership organization of 66,000 pediatricians committed to optimal physical, mental, and social health and well-being.
- **American Association of Nurse Practitioners (AANP)** empowers all nurse practitioners to advance quality health care through practice, education, advocacy, research and leadership.
- **American College of Healthcare Executives (ACHE)** is a membership-based professional society for leaders who are dedicated to improving health.
- **American Medical Association (AMA)** is the premier national organization providing timely, essential resources to empower physicians, residents and medical students.
- **American Nurses Association (ANA)** is a national professional association which advocates for all registered nurses and the patients they serve.
- **American Nursing Informatics Association (ANIA)** is designed to advance the field of nursing informatics through communication, education, research and professional activities.
- **National Association for Healthcare Quality (NAHQ)** is the only organization dedicated to healthcare quality professionals.
- **Radiological Society of North America (RSNA)** is an international society of radiologists, medical physicists and other medical professionals.
- **Regulatory Affairs Professionals Society (RAPS)** is the largest global organization of and for those involved with the regulation of healthcare and related products.
- **Society For Health Care Strategy & Market Development (SHSMD)** serves and represents healthcare professionals focusing on strategy development and implementation.
- **Society of Pediatric Nurses (SPN)** is the only broad-based pediatric nursing organization founded for all nurses involved in the care of children and families.

# Recruitment

## Community Colleges

Students are a great resource to create a future pipeline of talent and to stay connected with the community. Clinical internships are standard requirements in most health career programs and schools rely on partnerships with local employers to provide those internship opportunities.

Medical Assistants are in high demand and one way that you could strengthen your talent pipeline is by hosting a student at your clinic for a clinical internship. Medical Assisting students require between 180 and 240 unpaid supervised clinical hours for their senior practicum depending on their program. These students have completed their classroom work and are ready for graduation upon completion of their practicum. After the internship you may extend an offer of employment pending successful completion of their certification if you feel the student is a good fit. Most Medical Assisting programs place students in internships in the spring and the fall each year.

## Community Colleges in North Carolina

[www.nccommunitycolleges.edu/](http://www.nccommunitycolleges.edu/)



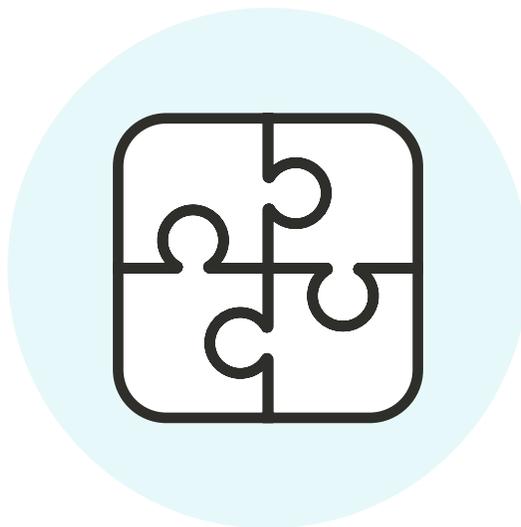
# Recruitment

## Importance of Hiring a Certified Medical Assistant (AAMA)

According to the US Bureau of Labor Statistics medical assistant is one of the fastest growing careers in the nation. This surge is in part due to the aging population who need medical care, particularly in outpatient care facilities and medical practices. Medical assistants perform a variety of both clinical and administrative duties and are an essential part of the healthcare team. Many employers require medical assistants to be certified through examination and to have attended an accredited educational program such as Certified Medical Assistant Training. This certification is granted to graduates of programs who are accredited through the American Association of Medical Assistants (AAMA), who are accredited by the Commission on Accreditation of Allied Health Education Programs (CAAHEP) or the Accrediting Bureau of Health Education Schools (ABHES). To find programs that meet these accreditation requirements please visit the following website:

<https://www.aama-ntl.org/medical-assisting/caahep-abhes-programs>

So, you might wonder why the certification is important. Certified CMAs have earned their credentials by passing an examination approved by the Certifying Board of the American Association of Medical Assistants. As with most health professionals, medical assistants must re-certify their credentials every 5 years through continuing education and by keeping their skills and knowledge current. CMA (AAMA) graduates attend 160 externship hours (minimum) in an outpatient setting prior to graduation and are required to pass a rigorous certification exam constructed and administered by the National Board of Medical Examiners. Hiring CMA (AAMA) graduates may lower your cost of training, may reduce the likelihood of your being sued for negligence, and may reduce insurance premiums.



# Recruitment

## Internal Referral Programs

Internal referrals and word of mouth are valuable methods of advertising. A good employee referral program can encourage existing employees to make referrals from their network of friends and is considered a top recruiting strategy for many organizations. Employee referral programs typically offer a referral bonus to employees and have been shown to improve the quality, fit, and retention of employees hired.

### Tips for creating an effective employee referral program

1

**Explain job requirements in detail and include a link to the job description when requesting referrals from employees in your organization.**

Employees may not know what you are looking for in a candidate so be sure to provide specific job requirements and qualifications, which should already be included in the job description. It is also a good idea to highlight what you are NOT looking for in a candidate. This will help prevent unqualified referrals and will remind employees which friends or acquaintances would make a good referral.

2

**Keep employees updated.**

Ensure that employees who refer candidates are updated on the process. Not being updated can make employees reluctant to refer again, which can undermine your employee referral program. If an interview is scheduled with a referred candidate, send a thank you email to the employee letting them know, and the same holds true if a referred candidate is not selected. An email thanking the referring employee will encourage them to keep looking for great people and shows your appreciation.

3

**Acknowledge good referrers.**

In addition to offering a monetary reward for employee referrals who were hired, provide public recognition for the referring employee. This lets them know that you appreciate their efforts, but also motivates others to do the same. Incorporating fun games can be a part of your employee referral program is a great way to engage employees to take part in the referral program. A point award system is one way to recognize top referrers. Points could be awarded for employees who share jobs on their social media site from the company's page, as well as points for referrals that accumulate to earn specific rewards.

4

**Offer a mix of monetary and non-monetary incentives.**

Money is a popular incentive but incentives, such as time off and gift vouchers are less expensive than cash awards. You can incorporate incentives such as baseball tickets or gift cards to drive your referral program. It may also be helpful to use a tiered system to include higher rewards for the harder to fill jobs. Once example of this would be to offer a flat amount for each referral and then offer more if the referred candidates get interviewed, get hired or stay at your company for at least six months.

5

**Continuously improve your referral program.**

Survey employees to find out what suggestions they have to improve your referral program. A successful referral program continues to adapt by making use of a variety of initiatives.

# Employment Laws

## Federal and State Laws Related to Employment in North Carolina

Under the North Carolina Equal Employment Practices Act, it is the public policy of the state to protect and safeguard the right of all persons to seek, obtain, and hold employment without discrimination based on race, religion, color, national origin, age, sex, or disability. The Act covers employers with 15 or more employees (NC Gen. Stat. Sec. 143-422.1 et seq.). The Act does not specifically address the issue of preemployment inquiries. However, federal law under Title VII of the Civil Rights Act of 1964 also covers employers with 15 or more employees and prohibits discrimination based on race, color, religion, sex, and national origin. According to Title VII guidelines issued by the federal Equal Employment Opportunity Commission (EEOC), preemployment questions about protected characteristics indicate that the applicant's response will be used for making hiring decisions and may constitute evidence of discrimination.

Therefore, employers should avoid making any inquiry that will elicit information about an applicant's protected status.

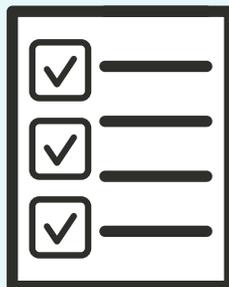
### Explore these laws:

[North Carolina Equal Employment Practices Act](#)

[NC State Employment Resources – NC Laws](#)

[Civil Rights Act of 1964](#)

[NC Employment At Will](#)



# Employment Applications

The purpose of an employment application is to obtain verifiable information about a job seeker, such as contact information, work history and eligibility to work in the U.S. It also collects information to help you prescreen job applicants by reviewing education, skills, qualifications, work history, and references to determine if the applicant meet the qualifications for your open position.

Employment applications provide a consistent way to review all job applicants gathering the same data in the same format which makes comparisons of candidates easier.

A job applicant should be provided space to verify by signature the following information:

- All information provided is true and accurate
- Applicant grants permission to the employer to verify all information provided
- Applicant verifies understanding of policies provided regarding drug testing
- Applicant verifies and grants permission for employer to obtain criminal background check, including criminal history, creditworthiness (for certain jobs only), driving record (for certain jobs only), as required by the job
- Applicant verifies understanding of any statements provided on the application identifying employer as an at-will-employer and an equal opportunity, non-discriminating employer

## Sample Job Application

YOUR LOGO  
HERE

Company Name

**Employment Application**

---

**Applicant Information**

Full Name: \_\_\_\_\_ Date: \_\_\_\_\_  

Last
First
M.I.

Address: \_\_\_\_\_  

Street Address
Apartment/Unit #

\_\_\_\_\_

City State ZIP Code

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Date Available: \_\_\_\_\_ Social Security No.: \_\_\_\_\_ Desired Salary: \$ \_\_\_\_\_

Position Applied for: \_\_\_\_\_

Are you a citizen of the United States? YES  NO  If no, are you authorized to work in the U.S.? YES  NO

Have you ever worked for this company? YES  NO  If yes, when? \_\_\_\_\_

Have you ever been convicted of a felony? YES  NO

If yes, explain: \_\_\_\_\_

---

**Education**

High School: \_\_\_\_\_ Address: \_\_\_\_\_

From: \_\_\_\_\_ To: \_\_\_\_\_ Did you graduate? YES  NO  Diploma: \_\_\_\_\_

College: \_\_\_\_\_ Address: \_\_\_\_\_

From: \_\_\_\_\_ To: \_\_\_\_\_ Did you graduate? YES  NO  Degree: \_\_\_\_\_

Other: \_\_\_\_\_ Address: \_\_\_\_\_

From: \_\_\_\_\_ To: \_\_\_\_\_ Did you graduate? YES  NO  Degree: \_\_\_\_\_

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**References**

*Please list three professional references.*

Full Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Company: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

1

# Employment Applications

## Reviewing Applications

Even though you have written a very detailed job description and posted the minimum and desired qualifications for your position, you will most likely receive many applications from unqualified candidates. You will need to know how to review a job application in order to identify any red flags as well as recognize a great candidate or a potential diamond in the rough.

The best way to review applicants is to create a checklist that will help you sort applicants into groups in order to narrow down your applicant pool. This simple step will save you and your organization time and money by avoiding a potential bad hire and finding the best fit for your open position.

## Tips to Help You Screen Applicants Effectively

### 1. Try to recognize conscious or unconscious biases that may impact hiring decisions.

Things that may cause one candidate to be preferred over another such as a candidate's picture, name, hometown, or any other thing that could pose a positive or negative influence on your hiring decision.

### 2. Sort Applicants in Groups of Yes, No, and Maybe

Perform a high-level screen of applicants that meet the minimum requirements detailed within the posted job description. Create a checklist that includes the minimum skills, experience and education requirements and use this as your framework to begin sorting your applications into the groups. Sort out your "Yes" applicants and follow the tips below.

### 3. Identify Potential Red Flags Include:

- Unexplained employment gaps
- Short time on job or job hopping - can be common for younger generation so consider the applicant. This could be a red flag indicating a lack of commitment.
- Grammatical mistakes – an application that is filled with typos and grammatical mistakes is a potential red flag that could indicate a lack of attention to detail.
- Word choice – pay attention to ambiguous language such as "familiar with" and "participated in". These phrases could indicate a lack of experience or knowledge.
- Look for examples - great candidates will use examples of how they contributed or added value in their previous roles.

### 4. Keep an Open Mind

When reviewing applications keep in mind that applicants who have non-traditional experience may be great hires who can easily gain knowledge through in-house training. Consider all candidates who pique your interest and evaluate their non-traditional experience against other qualified candidates. These candidates may not have the most experience or education compared to other qualified candidates, but they may have certain intrinsic characteristics that makes them a better motivational fit for your organization. You should consider hiring as much for potential as you do for skills or job history So, keep an open mind when reviewing applicants.

### 5. Consider the current hiring market

Consider the market when unemployment is at the lowest. The perfect candidate may not exist so you may need to review candidates for their growth potential and their fit within your organization.

# Screening

## Phone Screenings

The phone screening process is an important step in helping you screen out any candidates who may have potential signs of trouble. You have already completed a quick screen and sorting of the applicants, so the next step is a thorough phone screening interview. This process will help you further streamline your candidate pool to include only the best candidates and allow you to spend your focused time on interviewing only the top candidates from the pool of applicants.

## Schedule a Zoom Meeting

[www.zoom.com](http://www.zoom.com)



## Tips on Conducting a Job Applicant Phone Screen

### Phone Screening Checklist

1. **Are you still interested and available for the job?** Ask this question first to save yourself time and energy. The candidate could have accepted employment elsewhere, so it makes sense to ask this screening question first.
2. **What attracted you to this position?** This question will help you compare this candidate to others that you have screened for the job. Listen for details that indicate the candidate is enthusiastic and motivated for your position.
3. **Review the key requirements of the job with the candidate** - This question gives you key insight into whether or not the applicant has the core qualities you seek from the ideal candidate.
4. **What are your biggest accomplishments** – This question encourages the applicant to provide details about what they think is important. Past performance is a predictor of future performance so pay attention to accomplishments.
5. **Where are you in your job search** – The question will provide insights into the candidate's job search status, if they have applied for multiple positions, have had interviews, or if they are being considered for a position. You may want to discuss timeline for hiring and onboarding at this point if you feel the candidate is a good fit and would like to move them forward to the interview phase.
6. **Describe your ideal working situation (work environment, hours, travel, and the like)** - This question will help you identify candidates who may not fit with your current work environment and/or company culture. Even if the applicant seems to have the best qualifications for the position, they might not be the best fit.
7. **What are your salary expectations** – The response from this question will provide you with insights into the candidates financial fit for the position. If their expectation is not in alignment with yours, you can safely eliminate the candidate from your list.
8. **What is your availability for an interview in the next week to 10 days** - This question will help you gauge the motivation level of the candidate. If you have difficulty scheduling an interview within your timeframe you may need to eliminate the candidate.
10. **Is there anything else that you want to discuss** - This question provides an opportunity for the candidate to express their interest in moving forward in the interviewing process.

# Job Interview

At this point you have selected your top candidates who will move forward for a formal interview. Now you need to decide who will interview the candidate and what format you will use for the interview. A typical interview should last for 60 – 90 minutes.

**Peer Interview:** You may choose a peer interview where the candidate interviews with their potential co-workers

**Panel Interview:** Or you may choose a panel interview that includes a mix of individuals from your organization.

**Virtual Interview:** You should still provide the same formality and preparation as you would for an in-person interview. You want to make sure that you give your candidate a lasting impression of your practice, screen for their clinical skills, and fit for your office.



# Job Interview

## Behavioral Interview Guide

At this point you have selected your top candidates from your phone screening and are ready to schedule the formal interview. You will want to decide first who will interview the candidate. You may choose to have them sit in a room with peers or a panel interview that includes a mix of individuals from your organization. Once you decide who will interview the candidate you will need to determine the structure. A typical interview will last for about one hour.

### Common Structure of the Job Interview

- Introductions – made within the first 5-10 minutes. This portion of the interview is used to break the ice and to build rapport. Have each person introduce themselves and then allow time for the candidate to do the same.
- Interview questions – allow about 30-45 minutes for this portion of the interview. This is time to let the candidate speak and for you to determine if the candidate is a match for the position.
- Ask any clarifying questions – allow 5-10 minutes for this portion of the interview. There may be questions related to an answer that was provided or you may have questions related to past work experience. This is the time to ask any clarifying questions to elicit the level of detail needed for you to evaluate the candidate. Take notes so that you may compare all candidates once the interview phase has been completed.
- Closing remarks – allow 5 minutes at the end of the interview to allow the candidate to ask questions and to make any closing remarks. Let the candidate know what your follow-up timeline is.

## Common Behavioral Interview Questions

A behavioral interview allows a candidate to answer questions through discussion of real experiences. There have been many studies that show past performance is an indicator of future performance. Behavioral interview questions are a way for you to evaluate a candidate's past performance through discussion of their past experiences. Your questions begin with "tell me of a time when" and the candidate shares an experience that demonstrates their skills, knowledge, or ability.

When you ask a behavioral interview question, pause to allow your candidate time to think of his/her best answer. Let your candidate know how you would like their answer to be formatted. The STAR format is the most widely practiced response for behavior-based interview questions.

**Situation** – What was the situation (this is the who, what, where, when, and why)?

**Task** – What was your role in the situation?

**Action** – What actions did you take to resolve the situation and why?

**Result** – What was the results or outcome? How did you feel, what did you learn, how does this influence who you are today? – this can highlight a candidate's strengths.

### Most behavioral interview questions asked to healthcare professionals are based around the following themes

- Teamwork
- Patient care
- Resilience
- Time management
- Communication style
- Motivation

# Job Interview

## Behavioral Interview Guide (Cont.)

### Healthcare Related Behavioral Interview Questions Related to Teamwork

This line of questioning will help you determine if the candidate will be a good fit for your team.

- Tell me of a situation when there was a conflict within your team. What was the situation and how did you handle it?
- Tell me of a time when you had too much work and couldn't get it completed in time. What was the situation and how did you handle it?
- Tell me of a situation when you encouraged someone on your team. What was the situation and what were your actions?

### Healthcare Related Behavioral Interview Questions Related to Patient Care

This line of questioning provides insight into the candidate's ability to speak up and question the status quo by put patient safety concerns first.

- Tell me about a time when you had concerns about the potential for errors that could cause patient harm. What if anything did you do to ensure safety or improve the situation?
- Tell me about a situation when you witnessed someone breaking a rule or cutting corners that could have put a patient at risk for harm. What was the situation and how did you handle it?
- Tell me of a time that you questioned a physician or practitioner order because you felt it might cause potential harm to the patient? What was the situation and what did you do?

### Healthcare Related Behavioral Interview Questions Related to Resilience

Resilience is a person's ability to cope high-stress, physically and emotionally demanding roles.

Interview questions that you may ask to determine resiliency include:

- Tell me about a time when you endured a stressful situation at work. How did it affect you? What characteristics about your personality have helped you manage stress?
- Tell me about a time when someone wasn't happy with your performance at work (could be a manager, co-worker, or patient, etc.). What was the situation and how did it affect you? What did you do about it?
- Tell me of a recent time when you had a big disappointment. This could be work related or non-work related. What was the situation and how did it affect you emotionally? What have you don't about it?

### Healthcare Related Behavioral Interview Questions Related to Time Management

Healthcare workers in rural practices are required to be multitaskers. This line of questioning will help you determine a candidate's ability to handle multiple tasks effectively.

- Tell me about a time when you worked in a fast-paced environment and needed to prioritize your work to get the job completed. What was the situation and how did you handle it?
- Tell me about a time when you felt overwhelmed with your workload. What was the situation and how did you handle it?
- Tell me of an important goal that you set for yourself. Did you accomplish the goal? What steps did you take to ensure that you would accomplish the goal?

# Job Interview

## Healthcare Related Behavioral Interview Questions Related to Communication

Effective communication is critical in a healthcare setting. This line of questioning will help you evaluate the candidate's ability to communicate with different members of the healthcare team.

- Tell me of a situation when you worked with a difficult co-worker. What was the situation and how did you handle it?
- Tell me of a situation when you had to overcome a communication barrier to make sure a patient or family member understood what you were telling them. What was the situation and how did you handle it?
- Tell me of a time when you a patient that you were responsible for was unhappy with some aspect of their care that you were not responsible for. What was your response to the patient and what, if anything, did you do about it?

## Healthcare Related Behavioral Interview Questions Related to Motivation

This line of questioning helps you determine the motivation level of the candidate.

- What is one accomplishment that you are most proud of? What was the situation and why was it important?
- Tell me of a challenging situation when you took the initiative to correct a problem. What was the situation and what were your actions?
- Tell me of a time when you went above and beyond the expectation of your job. What was the situation and what was your motivation?
- Tell me of a time when you made a mistake. What was the situation and how did you handle it?

---

## Unacceptable Job Interview Questions

There are North Carolina laws as well as federal laws that prevent you from asking potential employees questions related to age, religion, national origin, race/color, sex, disability, or caregiver status. The following is a list of questions NOT to ask during an interview. This list is not comprehensive and is meant to be a guide only.

Where were you born?

Where are your parents from?

How old are you?

When are you planning to retire?

When are you getting married?

When are you having children?

What is your religion?

What is your native language?

When were you born?

What is your ethnicity?

How long have you been in the US?

Any question related to skin color

Are you married, engaged, or have a partner?

What are your child care arrangements?

How many children do you have?

Do you have a disability?

How many days were you sick on your last job?

Are you a United States citizen?

## NC Government Equal Employment Opportunity Interview Guidelines and Resources

[www.files.nc.gov/ncoshr/documents/Diversity-Inclusion/OSHR\\_EEO\\_Interview\\_Guidelines](http://www.files.nc.gov/ncoshr/documents/Diversity-Inclusion/OSHR_EEO_Interview_Guidelines)

# Job Interview

## Candidate Evaluation Form

Candidate Name: \_\_\_\_\_ Position: \_\_\_\_\_

Interviewer Name: \_\_\_\_\_ Date: \_\_\_\_\_

### Candidate Rating Key:

The candidate evaluation form is to be completed by the interviewer to record notes and evaluate a candidate's qualifications in specific areas related to the job he or she is being interviewed for. Using the same scoring system for every candidate will help to create an unbiased process that will more accurately describe how the interview went.

5 - Excellent      4 - Good      3 - Fair      2 - Poor      1 - Very Poor

**Work Experience:** Rate the candidate's experience, skills, knowledge, abilities and qualifications related to the position applied for:

Comments:

Rating      1          2          3          4          5

**Educational and Training:** Rate the candidate's education and training related to the position applied for:

Comments:

Rating      1          2          3          4          5

**Verbal and/or Written Communication:** Rate if candidate demonstrates effective verbal and/or written communication skills during the interview:

Comments:

Rating      1          2          3          4          5

**Technical Skills/Experience:** Rate the candidate's technical skills necessary for the position applied for:

Comments:

Rating      1          2          3          4          5

**Teambuilding/Interpersonal Skills:** Rate the candidate's ability to be a good team player and/or interpersonal skills:

Comments:

Rating      1          2          3          4          5

**Initiative:** Rate the candidate's ability to demonstrate initiative through answers to the behavioral interview questions:

Comments:

Rating      1          2          3          4          5

**Time Management:** Rate the candidate's demonstration of good time management through answers to the behavioral interview questions:

Comments:

Rating      1          2          3          4          5

**Customer Service:** Rate the candidate's demonstration of customer service skills through answers to the behavioral interview questions:

Comments:

Rating      1          2          3          4          5

**Enthusiasm and Knowledge of the Company:** Rate the candidate's enthusiasm for the position and knowledge of the company:

Comments:

Rating      1          2          3          4          5

**Overall Impression:** Rate your overall impression of the candidate's performance during this interview. State your recommendation or final thoughts for moving the candidate forward:

Comments:

Rating      1          2          3          4          5

**Final interview score (Possible 50)** \_\_\_\_\_

**Interviewing Panel Included:**

# Background Checks

## Reference Checking

A reference check is another level of verifying information about the candidate to help you make a more informed hiring decision. You have put a lot of time and energy into finding the perfect candidate so it's important to include this step in your final process.

### Here are a few tips to keep in mind when contacting references:

- Let the candidate know that you will be contacting references
- Identify yourself and the person who left them as a reference and confirm that it's a good time for the call
- Keep the conversation brief and let the contact know that all information will remain confidential
- Verify dates of employment, knowledge, skills set etc.
- Describe the job position and ask the reference if they feel the candidate would be a good fit for the role
- Verify educational degrees and certifications by contacting those institutions

## Background Checks and Drug Screening

Background checks and drug screenings are tools used to provide further information regarding the job applicant's fit for your team. Conducting this type of pre-employment screening can also help ensure the safety of your employees and avoid potential workplace theft and/or violence.

There are many services that provide both criminal background checks and drug testing as a complete services. Costs vary widely and can be very expensive. Consider your basic needs when deciding what type of background and drug test information you want to include. Here are a few guidelines:

- Background checks should only be initiated once an offer of employment has been extended with a condition of successful completion of the background check and other preemployment screening such as drug testing, credit checks (if handling large amounts of money), or DMV check (if driving is required for the job).
- ALL information obtained during a background investigation must be kept confidential and those records should be held in a secure location for a set number of years per Federal Law (usually 7 years).
- Federally funded healthcare agencies are required to conduct an Office of Inspector General (OIG) report on applicants, which looks for health care fraud (Medicare or Medicaid). This is a free report that you can pull yourself by going to <https://exclusions.oig.hhs.gov/SearchResults.aspx>

# Written Job Offer or Rejection Letter

## Written Job Offer or Rejection Letter

An offer is typically confirmed over the phone or email and is usually contingent upon completion of a background check, pre-employment drug screen and reference checks. Once those steps are complete you may want to send a more formal written offer letter to confirm the previously agreed upon details such the job title, start date, and starting pay.

## Sample Offer Letter

Your Name  
Your Company Name  
Street Address  
City, State, Zip Code  
Phone Contact Information  
Email  
Date

Candidate Name  
Address  
City, State, Zip Code

Dear Candidate Name,

ABCD company is pleased to offer you the position of job title here. Your skills and experience will be an ideal fit for our company, team, department.

As we discussed, your starting date will be \_\_\_\_\_. The starting salary is \_\_\_\_\_ per year and is paid on a \_\_\_\_\_ basis.

Benefit options include Full family medical coverage, dental, life, etc. and will be provided through our company's employee benefit plan and will be effective on \_\_\_\_\_. Company Name offers a flexible paid time-off plan which includes vacation, personal, and sick leave. Time off accrues at the rate of \_\_\_\_\_ and increases based on \_\_\_\_\_. Eligibility for the company retirement plan begins \_\_\_\_\_.

If you choose to accept this job offer, please sign the second copy of this letter and return it to me at your earliest convenience.

When your acknowledgment is received, we will send you employee benefit enrollment forms and an employee handbook which details our benefit plans and retirement plan. We look forward to welcoming you to the Company Name.

Please let me know if you have any questions or I can provide any additional information.

Sincerely,

Hiring manager name  
Title  
Company Name  
\_\_\_\_\_

I hereby accept the Assistant Director, Customer Relations position.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

# Written Job Offer or Rejection Letter

A rejection letter should be sent when a candidate has not been selected for a position. Interview candidates may be anxiously awaiting an offer of employment from you and may have other job opportunities on hold awaiting your response. It's important to close the loop on candidates that you have chosen not to hire.

## Sample Rejection Letter

Your Name  
Your Company Name  
Street Address  
City, State, Zip Code  
Phone Contact Information  
Email

Date

Candidate Name  
Address  
City, State, Zip Code

Dear Candidate Name,

Thank you for coming in to interview for the position of accounting clerk with Draper, Inc. As you know, we interviewed a number of candidates. This letter is to let you know that you have not been selected for the position.

Thank you for taking the time to come to Draper, Inc. to meet our interview team. The team appreciates that you interviewed for the accounting clerk position.

We wish you success with your ongoing job search. Thank you for your interest in our company.

Best wishes,

Hiring manager name  
Title  
Company Name



# Orientation and Onboarding

## Orientation and Onboarding

The hiring process doesn't end when you have hired the right candidate. A good orientation and onboarding process can increase the level of commitment, satisfaction and performance in employees while decreasing the cost of turnover.

Orientation is typically completed in a few days and includes an introduction to company culture, policies, procedures, and his/her role in the organization. The actions taken during the first few days of employment can help new employees adjust to their work environment and prepare them for their new job duties.

## Orientation Checklist

Sample Orientation Checklist	
Administrative Support	<ul style="list-style-type: none"> <li>○ I-9 form</li> <li>○ W-4 form</li> <li>○ Employee acknowledgement and consent form</li> <li>○ Direct deposit form</li> <li>○ How to enter and leave the building</li> <li>○ How to place orders (for office supplies etc.)</li> <li>○ How to request time off (how to request holiday, vacation, sick leave)</li> <li>○ How to get security badge</li> <li>○ How to get business cards</li> <li>○ How to order uniforms</li> </ul>
Policies and Procedures	<ul style="list-style-type: none"> <li>○ Non-disclosure agreement</li> <li>○ Non-compete agreement</li> <li>○ Confidentiality agreement</li> <li>○ HIPAA</li> <li>○ Health and life insurance</li> <li>○ Mobile plan reimbursement</li> <li>○ Performance bonus guide</li> <li>○ Employee wellness program</li> <li>○ Vacation/ paid time off</li> <li>○ Work from home</li> <li>○ Sick leave</li> <li>○ Safety guidelines</li> <li>○ Absenteeism</li> <li>○ Data security</li> <li>○ Regular work times</li> <li>○ Breaks</li> <li>○ Lunch options</li> <li>○ Give new hires a copy of your employee handbook if available</li> </ul>
Introduction and Tour of Offices	<ul style="list-style-type: none"> <li>○ Lead new hires on an office tour and show them where each department is located</li> <li>○ Bathroom</li> <li>○ Kitchen</li> <li>○ Dining area</li> <li>○ Introductions to their direct manager</li> <li>○ The office manager</li> <li>○ Introduce new hires to all teams.</li> <li>○ Schedule meet and greet times for new hires with colleagues and team leaders from other departments</li> <li>○ Show any meeting rooms and how to reserve them</li> <li>○ Show where the building's emergency exits are</li> <li>○ Schedule a teamwide meetup to welcome new hires in less formal setting (e.g., a group lunch or after-hours dinner.)</li> </ul>

# Orientation and Onboarding

## Onboarding

Onboarding can last up to a year and is when the employee learns about his/her role in the department. It includes continuous communication and feedback on performance and serves to provide a solid foundation to your new employee by giving them the proper socialization, information, and tools necessary to be successful in the job they have been hired to perform.

## Onboarding Checklist

Sample Onboarding Checklist	
Week 1	<ul style="list-style-type: none"> <li>• Ask other employees to check in on them to ensure they feel supported</li> <li>• Schedule milestone check-in at regular intervals to evaluate progress and set goals for the next period (could be every month or every 90-days, etc.)</li> <li>• Ensure all that all passwords and system access is functioning properly</li> <li>• Consider scheduling weekly or bi-weekly one-on-ones so you can provide feedback and answer any questions they have</li> </ul>
Month 1	<ul style="list-style-type: none"> <li>• Review month one performance and provide coaching</li> <li>• Ensure payroll and PTO accrual is functioning properly</li> <li>• Check-in on employee training to ensure adequate progress</li> <li>• Set month two goals to challenge them</li> </ul>
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Month 6 Check-In	<ul style="list-style-type: none"> <li>• Review the goals set last quarter and provide coaching where necessary</li> <li>• Assign additional duties if they're ready for it</li> <li>• Consider having them train any new hires</li> <li>• Set new goals for the next quarter</li> <li>• Schedule their next quarterly check-in</li> </ul>
Month 9 Check-In	<ul style="list-style-type: none"> <li>• Review the goals set last quarter and provide coaching where necessary</li> <li>• Set new goals for the next quarter</li> <li>• Prepare them for their annual review</li> </ul>
Annual Review	<ul style="list-style-type: none"> <li>• Review their quarterly goals and look back at their performance for the whole year</li> <li>• Assess their strengths and discuss any future opportunities you see for them</li> <li>• Discuss additional compensation or potential promotion opportunities</li> </ul>

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# Behavioral Interview Guide

At this point you have selected your top candidates from your phone screening and are ready to schedule the formal interview. You will want to decide first who will interview the candidate. You may choose to have them sit in a room with peers or a panel interview that includes a mix of individuals from your organization. Once you decide who will interview the candidate you will need to determine the structure. A typical interview will last for about one hour.

## Common Structure of the Job Interview

- Introductions – made within the first 5-10 minutes. This portion of the interview is used to break the ice and to build rapport. Have each person introduce themselves and then allow time for the candidate to do the same.
- Interview questions – allow about 30-45 minutes for this portion of the interview. This is time to let the candidate speak and for you to determine if the candidate is a match for the position.
- Ask any clarifying questions – allow 5-10 minutes for this portion of the interview. There may be questions related to an answer that was provided or you may have questions related to past work experience. This is the time to ask any clarifying questions to elicit the level of detail needed for you to evaluate the candidate. Take notes so that you may compare all candidates once the interview phase has been completed.
- Closing remarks – allow 5 minutes at the end of the interview to allow the candidate to ask questions and to make any closing remarks. Let the candidate know what your follow-up timeline is.

## Common Behavioral Interview Questions

A Behavioral Interview allows a candidate to answer questions through discussion of real experiences. There have been many studies that show past performance is an indicator of future performance. Behavioral Interview questions are a way for you to evaluate a candidate's past performance through discussion of their past experiences. Your questions begin with "tell me of a time when" and the candidate shares an experience that demonstrates their skills, knowledge, or ability.

When you ask a Behavioral Interview question, pause to allow your candidate time to think of his/her best answer. Let your candidate know how you would like their answer to be formatted. The STAR format is the most widely practiced response for behavior-based interview questions.

**Situation** – What was the situation (this is the who, what, where, when, and why)?

**Task** – What was your role in the situation?

**Action** – What actions did you take to resolve the situation and why?

**Result** – What was the results or outcome? How did you feel, what did you learn, how does this influence who you are today? – this can highlight a candidate's strengths.

## Behavioral Interview Guide (Cont.)

**Most behavioral interview questions asked to healthcare professionals are based around the following themes**

- Teamwork
- Patient care
- Resilience
- Time management
- Communication style
- Motivation

### **Healthcare Related Behavioral Interview Questions Related to Teamwork**

This line of questioning will help you determine if the candidate will be a good fit for your team.

- Tell me of a situation when there was a conflict within your team. What was the situation and how did you handle it?
- Tell me of a time when you had too much work and couldn't get it completed in time. What was the situation and how did you handle it?
- Tell me of a situation when you encouraged someone on your team. What was the situation and what were your actions?

### **Healthcare Related Behavioral Interview Questions Related to Patient Care**

This line of questioning provides insight into the candidate's ability to speak up and question the status quo by put patient safety concerns first.

- Tell me about a time when you had concerns about the potential for errors that could cause patient harm. What if anything did you do to ensure safety or improve the situation?
- Tell me about a situation when you witnessed someone breaking a rule or cutting corners that could have put a patient at risk for harm. What was the situation and how did you handle it?
- Tell me of a time that you questioned a physician or practitioner order because you felt it might cause potential harm to the patient? What was the situation and what did you do?

### **Healthcare Related Behavioral Interview Questions Related to Resilience**

Resilience is a person's ability to cope high-stress, physically and emotionally demanding roles. Interview questions that you may ask to determine resiliency include:

- Tell me about a time when you endured a stressful situation at work. How did it affect you? What characteristics about your personality have helped you manage stress?
- Tell me about a time when someone wasn't happy with your performance at work (could be a manager, co-worker, or patient, etc.). What was the situation and how did it affect you? What did you do about it?
- Tell me of a recent time when you had a big disappointment. This could be work related or non-work related. What was the situation and how did it affect you emotionally? What have you don't about it?

## Behavioral Interview Guide (Cont.)

### Healthcare Related Behavioral Interview Questions Related to Time Management

Healthcare workers in rural practices are required to be multitaskers. This line of questioning will help you determine a candidate's ability to handle multiple tasks effectively.

- Tell me about a time when you worked in a fast-paced environment and needed to prioritize your work to get the job completed. What was the situation and how did you handle it?
- Tell me about a time when you felt overwhelmed with your workload. What was the situation and how did you handle it?
- Tell me of an important goal that you set for yourself. Did you accomplish the goal? What steps did you take to ensure that you would accomplish the goal?

### Healthcare Related Behavioral Interview Questions Related to Communication

Effective communication is critical in a healthcare setting. This line of questioning will help you evaluate the candidate's ability to communicate with different members of the healthcare team.

- Tell me of a situation when you worked with a difficult co-worker. What was the situation and how did you handle it?
- Tell me of a situation when you had to overcome a communication barrier to make sure a patient or family member understood what you were telling them. What was the situation and how did you handle it?
- Tell me of a time when you a patient that you were responsible for was unhappy with some aspect of their care that you were not responsible for. What was your response to the patient and what, if anything, did you do about it?

### Healthcare Related Behavioral Interview Questions Related to Motivation

This line of questioning helps you determine the motivation level of the candidate.

- What is one accomplishment that you are most proud of? What was the situation and why was it important?
- Tell me of a challenging situation when you took the initiative to correct a problem. What was the situation and what were your actions?
- Tell me of a time when you went above and beyond the expectation of your job. What was the situation and what was your motivation?
- Tell me of a time when you made a mistake. What was the situation and how did you handle it?

# Candidate Evaluation Form

Candidate Name: \_\_\_\_\_

Position: \_\_\_\_\_

Interviewer Name: \_\_\_\_\_

Date: \_\_\_\_\_

## Candidate Rating Key:

The candidate evaluation form is to be completed by the interviewer to record notes and evaluate a candidate's qualifications in specific areas related to the job he or she is being interviewed for. Using the same scoring system for every candidate will help to create an unbiased process that will more accurately describe how the interview went.

5 - Excellent 4 - Good 3 - Fair 2 - Poor 1 - Very Poor

**Work Experience:** Rate the candidate's experience, skills, knowledge, abilities and qualifications related to the position applied for:

Comments:

Rating

1      2      3      4      5

**Educational and Training:** Rate the candidate's education and training related to the position applied for:

Comments:

Rating

1      2      3      4      5

**Verbal and/or Written Communication:** Rate if candidate demonstrates effective verbal and/or written communication skills during the interview:

Comments:

Rating

1      2      3      4      5

## Candidate Evaluation Form (Cont.)

**Technical Skills/Experience:** Rate the candidate's technical skills necessary for the position applied for:

Comments:

Rating

1      2      3      4      5

**Teambuilding/Interpersonal Skills:** Rate the candidate's ability to be a good team player and/or interpersonal skills:

Comments:

Rating

1      2      3      4      5

**Initiative:** Rate the candidate's ability to demonstrate initiative through answers to the behavioral interview questions:

Comments:

Rating

1      2      3      4      5

**Time Management:** Rate the candidate's demonstration of good time management through answers to the behavioral interview questions:

Comments:

Rating

1      2      3      4      5

## Candidate Evaluation Form (Cont.)

**Customer Service:** Rate the candidate's demonstration of customer service skills through answers to the behavioral interview questions:

Comments:

Rating

1      2      3      4      5

**Enthusiasm and Knowledge of the Company:** Rate the candidate's enthusiasm for the position and knowledge of the company:

Comments:

Rating

1      2      3      4      5

**Overall Impression:** Rate your overall impression of the candidate's performance during this interview. State your recommendation or final thoughts for moving the candidate forward:

Comments:

Rating

1      2      3      4      5

Final interview score (Possible 50) \_\_\_\_\_

Interviewing Panel Included:

# Job Description Template

**Job Description Title**

**Company Name**

**Job Title**

**General Job Description**

**Job Responsibilities (skills, knowledge, abilities)**

**Required Qualifications**

**Preferred Qualifications**

Approved By:	Print Name:	Signature:
Date Approved:		
Date Last Reviewed:		
Last Reviewed By:		

# Medical Assistant Job Description

## Job Summary

As a Medical Assistant, you will utilize your empathic and passionate nature to perform a combination of administrative and clinical tasks within a medical practice setting. You will work alongside an incredible team to care for the immediate medical needs of our patients. You will work in a dynamic environment, where you are considered a pivotal member of a team that works to exceed practice goals, foster teamwork, and keeps the facility organized and operating efficiently.

## Job Responsibilities

### Administrative duties

- Managing office telephone systems, including answering calls and returning messages
- Scheduling patient appointments and maintaining communication to confirm future appointments
- Documenting patients' medical information, including medical history and health insurance information
- Performing data entry tasks to document patient records within facility databases and maintaining patient files
- Coordinating daily office activities, greeting patients and checking patients in and out for their appointments

### Clinical duties

- Recording patients' vital signs, documenting notes and changes in medical conditions
- Taking tissue and fluid samples and sending them in for laboratory analysis
- Prepping exam rooms for clinical procedures and assisting practitioners with patient care
- Assisting clinicians during routine checkups, outpatient procedures and other physical exams
- Monitoring and documenting patient symptoms for clinicians' review during clinical exams
- Providing compassionate patient support and care, attention and assistance during office visits
- Preparing and administering medications under the direction of supervising physicians

## Job Skills & Qualifications

### Required:

- High school diploma
- Certification and licensure (be specific)
- Excellent verbal, written and interpersonal communication skills
- Physical ability to perform job-related duties

### Preferred:

- Mastery of basic clinical skills
- Degree (if applicable)

## Phone Screening Checklist

1. **Are you still interested and available for the job?** Ask this question first to save yourself time and energy. The candidate could have accepted employment elsewhere, so it makes sense to ask this screening question first.
2. **What attracted you to this position?** This question will help you compare this candidate to others that you have screened for the job. Listen for details that indicate the candidate is enthusiastic and motivated for your position.
3. **Review the key requirements of the job with the candidate** - This question gives you key insight into whether or not the applicant has the core qualities you seek from the ideal candidate.
4. **What are your biggest accomplishments** – This question encourages the applicant to provide details about what they think is important. Past performance is a predictor of future performance so pay attention to accomplishments.
5. **Where are you in your job search** – The question will provide insights into the candidate’s job search status, if they have applied for multiple positions, have had interviews, or if they are being considered for a position. You may want to discuss timeline for hiring and onboarding at this point if you feel the candidate is a good fit and would like to move them forward to the interview phase.
6. **Describe your ideal working situation (work environment, hours, travel, and the like)** - This question will help you identify candidates who may not fit with your current work environment and/or company culture. Even if the applicant seems to have the best qualifications for the position, they might not be the best fit.
7. **What are your salary expectations** – The response from this question will provide you with insights into the candidates financial fit for the position. If their expectation is not in alignment with yours, you can safely eliminate the candidate from your list.
8. **What is your availability for an interview in the next week to 10 days** - This question will help you gauge the motivation level of the candidate. If you have difficulty scheduling an interview within your timeframe you may need to eliminate the candidate.
10. **Is there anything else that you want to discuss** - This question provides an opportunity for the candidate to express their interest in moving forward in the interviewing process.

# Sample Offer Letter

Your Name  
Your Company Name  
Street Address  
City, State, Zip Code  
Phone Contact Information  
Email

Date

Candidate Name  
Address  
City, State, Zip Code

Dear Candidate Name,

ABCD company is pleased to offer you the position of job title here. Your skills and experience will be an ideal fit for our company, team, department.

As we discussed, your starting date will be \_\_\_\_\_. The starting salary is \_\_\_\_\_ per year and is paid on a \_\_\_\_\_ basis.

Benefit options include Full family medical coverage, dental, life, etc. and will be provided through our company's employee benefit plan and will be effective on \_\_\_\_\_. Company Name offers a flexible paid time-off plan which includes vacation, personal, and sick leave. Time off accrues at the rate of \_\_\_\_\_ and increases based on \_\_\_\_\_. Eligibility for the company retirement plan begins \_\_\_\_\_.

If you choose to accept this job offer, please sign the second copy of this letter and return it to me at your earliest convenience.

When your acknowledgment is received, we will send you employee benefit enrollment forms and an employee handbook which details our benefit plans and retirement plan. We look forward to welcoming you to the Company Name.

Please let me know if you have any questions or I can provide any additional information.

Sincerely,

Hiring manager name  
Title  
Company Name

\_\_\_\_\_

I hereby accept the Assistant Director, Customer Relations position.

\_\_\_\_\_

Signature

\_\_\_\_\_

Date

## Sample Onboarding Checklist

Week 1	<ul style="list-style-type: none"> <li>• Ask other employees to check in on them to ensure they feel supported</li> <li>• Schedule milestone check-in at regular intervals to evaluate progress and set goals for the next period (could be every month or every 90-days, etc.)</li> <li>• Ensure all that all passwords and system access is functioning properly</li> <li>• Consider scheduling weekly or bi-weekly one-on-ones so you can provide feedback and answer any questions they have</li> </ul>
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Month 6 Check-In	<ul style="list-style-type: none"> <li>• Review the goals set last quarter and provide coaching where necessary</li> <li>• Assign additional duties if they're ready for it</li> <li>• Consider having them train any new hires</li> <li>• Set new goals for the next quarter</li> <li>• Schedule their next quarterly check-in</li> </ul>
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Annual Review	<ul style="list-style-type: none"> <li>• Review their quarterly goals and look back at their performance for the whole year</li> <li>• Assess their strengths and discuss any future opportunities you see for them</li> <li>• Discuss additional compensation or potential promotion opportunities</li> </ul>

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<p>Administrative Support</p>	<ul style="list-style-type: none"> <li>○ I-9 form</li> <li>○ W-4 form</li> <li>○ Employee acknowledgement and consent form</li> <li>○ Direct deposit form</li> <li>○ How to enter and leave the building</li> <li>○ How to place orders (for office supplies etc.)</li> <li>○ How to request time off (how to request holiday, vacation, sick leave)</li> <li>○ How to get security badge</li> <li>○ How to get business cards</li> <li>○ How to order uniforms</li> </ul>
<p>Policies and Procedures</p>	<ul style="list-style-type: none"> <li>○ Non-disclosure agreement</li> <li>○ Non-compete agreement</li> <li>○ Confidentiality agreement</li> <li>○ HIPAA</li> <li>○ Health and life insurance</li> <li>○ Mobile plan reimbursement</li> <li>○ Performance bonus guide</li> <li>○ Employee wellness program</li> <li>○ Vacation/ paid time off</li> <li>○ Work from home</li> <li>○ Sick leave</li> <li>○ Safety guidelines</li> <li>○ Absenteeism</li> <li>○ Data security</li> <li>○ Regular work times</li> <li>○ Breaks</li> <li>○ Lunch options</li> <li>○ Give new hires a copy of your employee handbook if available</li> </ul>
<p>Introduction and Tour of Offices</p>	<ul style="list-style-type: none"> <li>○ Lead new hires on an office tour and show them where each department is located</li> <li>○ Bathroom</li> <li>○ Kitchen</li> <li>○ Dining area</li> <li>○ Introductions to their direct manager</li> <li>○ The office manager</li> <li>○ Introduce new hires to all teams.</li> <li>○ Schedule meet and greet times for new hires with colleagues and team leaders from other departments</li> <li>○ Show any meeting rooms and how to reserve them</li> <li>○ Show where the building's emergency exits are</li> <li>○ Schedule a teamwide meetup to welcome new hires in less formal setting (e.g., a group lunch or after-hours dinner.)</li> </ul>

## Sample Rejection Letter

Your Name  
Your Company Name  
Street Address  
City, State, Zip Code  
Phone Contact Information  
Email

Date

Candidate Name  
Address  
City, State, Zip Code

Dear Candidate Name,

Thank you for coming in to interview for the position of accounting clerk with Draper, Inc. As you know, we interviewed a number of candidates. This letter is to let you know that you have not been selected for the position.

Thank you for taking the time to come to Draper, Inc. to meet our interview team. The team appreciates that you interviewed for the accounting clerk position.

We wish you success with your ongoing job search. Thank you for your interest in our company.

Best wishes,

Hiring manager name  
Title  
Company Name

# Tips for Creating an Effective Employee Referral Program

## **1. Explain job requirements in detail and include a link to the job description when requesting referrals from employees in your organization.**

Employees may not know what you are looking for in a candidate so be sure to provide specific job requirements and qualifications, which should already be included in the job description. It is also a good idea to highlight what you are NOT looking for in a candidate. This will help prevent unqualified referrals and will remind employees which friends or acquaintances would make a good referral.

## **2. Keep employees updated**

Ensure that employees who refer candidates are updated on the process. Not being updated can make employees reluctant to refer again, which can undermine your employee referral program. If an interview is scheduled with a referred candidate, send a thank you email to the employee letting them know, and the same holds true if a referred candidate is not selected. An email thanking the referring employee will encourage them to keep looking for great people and shows your appreciation.

## **3. Acknowledge good referrers**

In addition to offering a monetary reward for employee referrals who were hired, provide public recognition for the referring employee. This lets them know that you appreciate their efforts, but also motivates others to do the same. Incorporating fun games can be a part of your employee referral program is a great way to engage employees to take part in the referral program. A point award system is one way to recognize top referrers. Points could be awarded for employees who share jobs on their social media site from the company's page, as well as points for referrals that accumulate to earn specific rewards.

## **4. Offer a mix of monetary and non-monetary incentives**

Money is a popular incentive but incentives, such as time off and gift vouchers are less expensive than cash awards. You can incorporate incentives such as baseball tickets or gift cards to drive your referral program. It may also be helpful to use a tiered system to include higher rewards for the harder to fill jobs. One example of this would be to offer a flat amount for each referral and then offer more if the referred candidates get interviewed, get hired or stay at your company for at least six months.

## **5. Continuously improve your referral program**

Survey employees to find out what suggestions they have to improve your referral program. A successful referral program continues to adapt by making use of a variety of initiatives.

# Tips to Help You Screen Applicants Effectively

## 1. Try to recognize conscious or unconscious biases that may impact hiring decisions.

Things that may cause one candidate to be preferred over another such as a candidate's picture, name, hometown, or any other thing that could pose a positive or negative influence on your hiring decision.

## 2. Sort Applicants in Groups of Yes, No, and Maybe

Perform a high-level screen of applicants that meet the minimum requirements detailed within the posted job description. Create a checklist that includes the minimum skills, experience and education requirements and use this as your framework to begin sorting your applications into the groups. Sort out your "Yes" applicants and follow the tips below.

## 3. Identify Potential Red Flags Include:

- Unexplained employment gaps
- Short time on job or job hopping - can be common for younger generation so consider the applicant. This could be a red flag indicating a lack of commitment.
- Grammatical mistakes – an application that is filled with typos and grammatical mistakes is a potential red flag that could indicate a lack of attention to detail.
- Word choice – pay attention to ambiguous language such as "familiar with" and "participated in". These phrases could indicate a lack of experience or knowledge.
- Look for examples - great candidates will use examples of how they contributed or added value in their previous roles.

## 4. Keep an Open Mind

When reviewing applications keep in mind that applicants who have non-traditional experience may be great hires who can easily gain knowledge through in-house training. Consider all candidates who pique your interest and evaluate their non-traditional experience against other qualified candidates. These candidates may not have the most experience or education compared to other qualified candidates, but they may have certain intrinsic characteristics that makes them a better motivational fit for your organization. You should consider hiring as much for potential as you do for skills or job history So, keep an open mind when reviewing applicants.

## 5. Consider the current hiring market

Consider the market when unemployment is at the lowest. The perfect candidate may not exist so you may need to review candidates for their growth potential and their fit within your organization.

# Sample Job Application

YOUR LOGO  
HERE

Company Name

## Employment Application

### Applicant Information

Full Name: \_\_\_\_\_ Date: \_\_\_\_\_  
*Last First M.I.*

Address: \_\_\_\_\_  
*Street Address Apartment/Unit #*

\_\_\_\_\_  
*City State ZIP Code*

Phone: \_\_\_\_\_ Email \_\_\_\_\_

Date Available: \_\_\_\_\_ Social Security No.: \_\_\_\_\_ Desired Salary: \$ \_\_\_\_\_

Position Applied for: \_\_\_\_\_

Are you a citizen of the United States? YES  NO  If no, are you authorized to work in the U.S.? YES  NO

Have you ever worked for this company? YES  NO  If yes, when? \_\_\_\_\_

Have you ever been convicted of a felony? YES  NO

If yes, explain: \_\_\_\_\_

### Education

High School: \_\_\_\_\_ Address: \_\_\_\_\_

From: \_\_\_\_\_ To: \_\_\_\_\_ Did you graduate? YES  NO  Diploma: \_\_\_\_\_

College: \_\_\_\_\_ Address: \_\_\_\_\_

From: \_\_\_\_\_ To: \_\_\_\_\_ Did you graduate? YES  NO  Degree: \_\_\_\_\_

Other: \_\_\_\_\_ Address: \_\_\_\_\_

From: \_\_\_\_\_ To: \_\_\_\_\_ Did you graduate? YES  NO  Degree: \_\_\_\_\_

### References

Please list three professional references.

Full Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Company: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

## Disclaimer

Please note that the information provided, while authoritative, is not guaranteed for accuracy and legality. Please seek legal assistance, or assistance from State, Federal, or International governmental resources, to make certain your legal interpretation and decisions are correct for your location. This information is for guidance, ideas, and assistance.



## Notes

## Notes



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