

NEW PRACTICE HR CHECKLIST

Start on the right foot by building a winning team and establishing a solid HR & employment compliance foundation

90—120 Days Before Opening:

- Set short and long term goals for practice
- Evaluate and decide on the type of culture and work environment you want to establish
- Establish mission statement and core values for the practice
- Set staffing needs for opening and projected growth
- Create/edit job descriptions for each position: keeping culture, work environment and core values in mind, using Bent Ericksen & Associates (BE&A) provided templates
- Set compensation ranges for each position based on your area, your budget, and industry norms
- Decide what benefits will be provided to which employees and at what levels; BE&A can give you guidance
- Work with BE&A to customize a compliant Employee Policy Manual which will include required state and federal policies, practice policies and procedures as well as benefit descriptions
- Work with BE&A to establish job profiles for each position utilizing the “Drake P3” personality and assessment tool
- Learn about the 5 Languages of Appreciation in the Workplace: the easiest and most effective way to motivate employees

60—90 Days Before Opening:

- Draft job postings for websites, Craigslist, Dental Post, newspapers and industry periodicals following guidelines from BE&A’s HR FAQs, as well as sample copy from the established Drake P3 profile
- Place job postings, making sure an “apply by date” is included
- Review resumes and cover letters, eliminating those that clearly don’t qualify

30—60 Days Before Opening:

- With applicants you're interested in, conduct phone screens (3-5 minutes), asking each candidate for the same position the same questions, eliminating those that clearly don't fit your criteria
 - Ask remaining candidates to complete a BE&A application – **Do not proceed further without a completed application**
 - Review applications, eliminating those that clearly don't meet your criteria
 - Set up in-person interviews with remaining candidates
 - Build your interview questions for each position, focusing on the 80/20 rule and behavioral-based questions, not just experience-based questions. Learn from BE&A the questions to NOT ask in the interview
 - Conduct interviews; have applicants review the specific Job Description and sign off on the Applicant Job Acknowledgment form from BE&A
 - Narrow down applicants to the top 3-5 candidates for each position
 - Have top candidates complete a Drake P3 assessment
 - Review Drake P3 and job match profile with BE&A consultant, deciding on top 2-3 candidates for each position
 - Conduct a skills assessment with each remaining candidate – work with BE&A on how to manage these compliantly; decide on top 1-2 candidates for each position
 - Give a conditional offer of employment to the top candidate in each position and have the appropriate background check performed on each candidate
 - Make final hiring decision and proceed with final job offers
 - Set date(s) for employment and on-boarding process with new employees
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0—30 Days Before Opening:

- Set up personnel files (regular, confidential and Form I-9)
 - Have employees fill out all necessary BE&A forms for the appropriate personnel file
 - Have each employee read the practice's Policy Manual and sign the Acknowledgement Form
 - Have all training that must be done prior to opening occur during the on-boarding phase
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1—60 Days After Opening:

- Continually train, coach, evaluate performance and provide constructive performance-based feedback to support employees meeting practice and performance expectations; ensure good documentation practices throughout