

LIMITLESS ON DEMAND

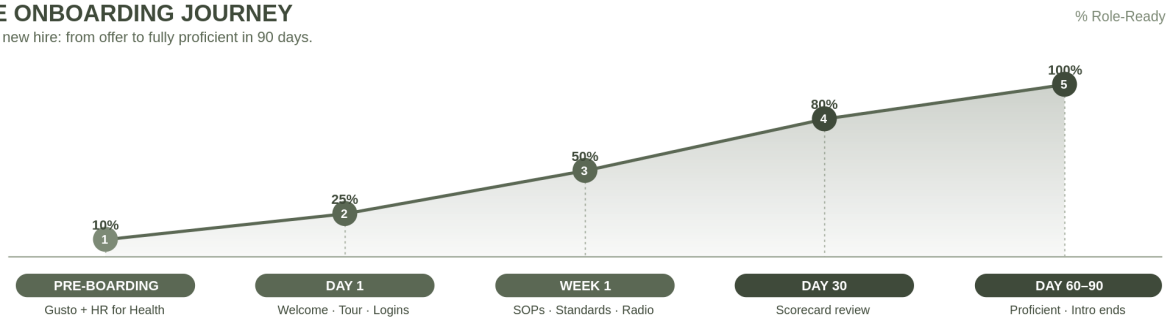
New Employee Onboarding Checklist

APPLIES TO: EVERY NEW TEAM MEMBER

Why this matters: A repeatable onboarding system gets every hire role-ready fast, so patient care scales without bottlenecks and the doctor can focus on dentistry.

THE ONBOARDING JOURNEY

Every new hire: from offer to fully proficient in 90 days.



GUSTO Payroll & Tax

- ▶ Self-onboard before Day 1: I-9 + work authorization (within 3 business days of start).
- ▶ Add W-4 and direct deposit. Pay is biweekly, every other Friday.
- ▶ Submit all PTO and time-off requests here.

HR FOR HEALTH HR, Handbook & Benefits

- ▶ Complete your profile; e-sign the Handbook, Arbitration Agreement & policies.
- ▶ Review benefits and health coverage; keep your personal info current here.

1 · BEFORE DAY 1: PRE-BOARDING

INITIAL _____

- ☐ Accept offer; confirm start date & weekly schedule.
- ☐ Gusto: complete I-9, W-4 and direct deposit.
- ☐ HR for Health: e-sign Handbook, Arbitration Agreement & policies.
- ☐ Confirm scrub / lab-coat sizes and name-tag spelling.

2 · DAY 1: WELCOME & SETUP

INITIAL _____

- ☐ Team introductions + practice tour with the doctor / office manager.
- ☐ Patient workflow tour: front desk, clinical, checkout.
- ☐ Practice logins issued: Open Dental, Weave, GoHighLevel.
- ☐ Billing access: insurance website sign-ins + eAssist.
- ☐ Shared files: Dropbox location shown; Google Docs for lab case tracker, ortho tracker & eAssist list.
- ☐ Radio assigned: Channel 2, earpiece in before the morning huddle.
- ☐ Shadow the Perfect Patient Experience flow.

3 · WEEK 1: SYSTEMS & STANDARDS

INITIAL _____

- ☐ Read your role SOPs and the 30 / 60 / 90 scorecard.
- ☐ Review the complete front desk office manual.
- ☐ Review position checklists with their corresponding Dropbox videos.
- ☐ Dress code confirmed: black, white, grey, dark green; scrubs per role.
- ☐ Patient standards: stand, smile, use the patient's name, offer comfort menu.
- ☐ Radio certified: Call → Copy → Complete → Close (acknowledge in 5 sec).
- ☐ Timekeeping in Open Dental (non-exempt: clock in/out + meals).

4 · DAY 30: PROFICIENCY

INITIAL _____

- ☐ 30 / 60 / 90 scorecard check-ins with your manager.
- ☐ Day 30: review all front desk office manual questions; extra training given on any subject you flag.
- ☐ Day 30: headshots taken for the website.
- ☐ Checklists reviewed again; record videos of all checklist items and upload to Dropbox.
- ☐ Introductory period completes at Day 90.
- ☐ PTO and paid sick & safe leave become usable on Day 120.
- ☐ Mental Health Wellness Benefit eligible at 6 months (full-time).
- ☐ Goal: fully proficient and owning your role independently.

SIGN-OFF (30 days) · The Office Manager keeps this completed, signed checklist on file.

Employee Name: _____

Start Date: _____

Employee Signature: _____ Date: _____

Office Manager: _____ Date: _____

Document once, delegate forever: buy back the doctor's time. Dan Martell
Onboard as hard as you hire: your speed to ramp is your speed to grow. Alex Hormozi

Questions? Ask the doctor or office manager. · Initial each section as you complete it; trainer verifies before filing.

LIMITLESS ON DEMAND

30 / 60 / 90 Day Scorecard

EVERY NEW TEAM MEMBER

Employee: _____ Role / Position: _____ Start Date: _____ Reviewer: _____

DAY 30 aim 3+, with guidance

DAY 60 aim 4+, independent

DAY 90 aim 5, owns the role

How to score: Rate each item 1 to 5 (1 = strongly disagree / not yet, 5 = strongly agree / mastery). Score the same rows at each review; 60 and 90 day items are performed with no supervision.

OBSERVABLE OUTCOME / BEHAVIOR	DAY 30	DAY 60	DAY 90
SYSTEMS & TOOLS			
Open Dental: performs daily tasks and clocks in / out accurately	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Weave, GoHighLevel, insurance portals & eAssist used correctly	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Dropbox + Google Docs trackers (lab case, ortho, eAssist) kept current	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
PATIENT EXPERIENCE			
Warm welcome: stands, smiles, uses the patient's name, offers comfort menu	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Executes their part of the Perfect Patient Experience flow	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Patients seen and handled promptly, accurately and professionally	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
COMMUNICATION & TEAMWORK			
Runs assigned morning huddle responsibilities	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Radio: closed-loop (Call, Copy, Complete, Close); acknowledges in 5 sec	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Clean handoffs and reliable, respectful team communication	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
EXECUTION & COMPLIANCE			
Completes daily duties and position checklist independently	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Owns core role KPIs and outcomes; targets on track	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
HIPAA / privacy upheld; documentation accurate and timely	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Dress code, punctuality, attendance and timekeeping on standard	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Follows SOPs, the front desk office manual and handbook policies	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
CULTURE & OWNERSHIP			
Reliable, accountable and coachable; lives the Limitless standard	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5

REVIEW NOTES (use at each milestone)

Strengths & wins: _____

Extra training needed: _____

Goal for next 30 days: _____

DAY 30 REVIEW

Date: _____

Employee: _____

Manager: _____

DAY 60 REVIEW

Date: _____

Employee: _____

Manager: _____

DAY 90 REVIEW

Date: _____

Employee: _____

Manager: _____

Document once, delegate forever: buy back the doctor's time. Dan Martell
What gets measured gets mastered; ramp speed is growth speed. Alex Hormozi

Goal: guided to fully proficient by Day 90, mirroring the Onboarding Checklist. · The Office Manager keeps this completed scorecard in the employee's personnel file.