

Check this template against your local regulations and your own policies before you use it.

Employee _____ Role _____ Start date _____

Buddy or manager _____

Onboarding From the signed offer to the end of probation

TASK	DUE	DATE	INITIALS
Before the first shift			
☐ Check their registration, certificate or qualification, as the role requires	Before day 1		
☐ Check their immunization records, as your infection control policy requires For example hepatitis B, with proof of immunity where your guidelines ask for it.	Before day 1		
☐ Check their CPR or basic life support certificate is current	Before day 1		
☐ Collect the contract, payroll details and emergency contacts	Before day 1		
☐ Set up their login for the practice software and imaging	Before day 1		
First day			
☐ Tour the operatories, sterilization area, lab, X-ray and staff areas	Day 1		
☐ Show the emergency kit, oxygen, AED and exits, and the medical emergency roles	Day 1		
☐ Go through standard precautions, hand hygiene and PPE	Day 1		
☐ Explain the sharps injury and exposure procedure	Day 1		
☐ Introduce them to the dentists, hygienists and front desk	Day 1		
First week			
☐ Train on the instrument reprocessing procedure and the sterilization log	Week 1		
☐ Train on setting up and cleaning down an operatory between patients	Week 1		
☐ Train on waterline flushing and suction maintenance	Week 1		
☐ Train on the practice software, charting and patient medical histories	Week 1		
☐ Train on radiation safety and taking radiographs, if their license allows it	Week 1		
First month			
☐ Have a dentist watch them assist through a full session	Month 1		
☐ Sign off their reprocessing and operatory competency	Month 1		
☐ Hold a 30-day check-in and agree goals	Month 1		
End of probation			
☐ Hold the probation review and confirm the outcome in writing	Month 3		
☐ Update their training record, including CPR renewal dates	Month 3		

Completed by _____ Checked by (manager) _____ Date _____ Notes _____