

2026

Sophisti⁺
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HUMAN RESOURCES COMPLIANCE

ANNUAL CALENDAR



The information provided is not intended to constitute professional, billing or legal advice and is made available for general informational purposes only. Managers should contact their own counsel or advisers to obtain advice with respect to any particular matter.

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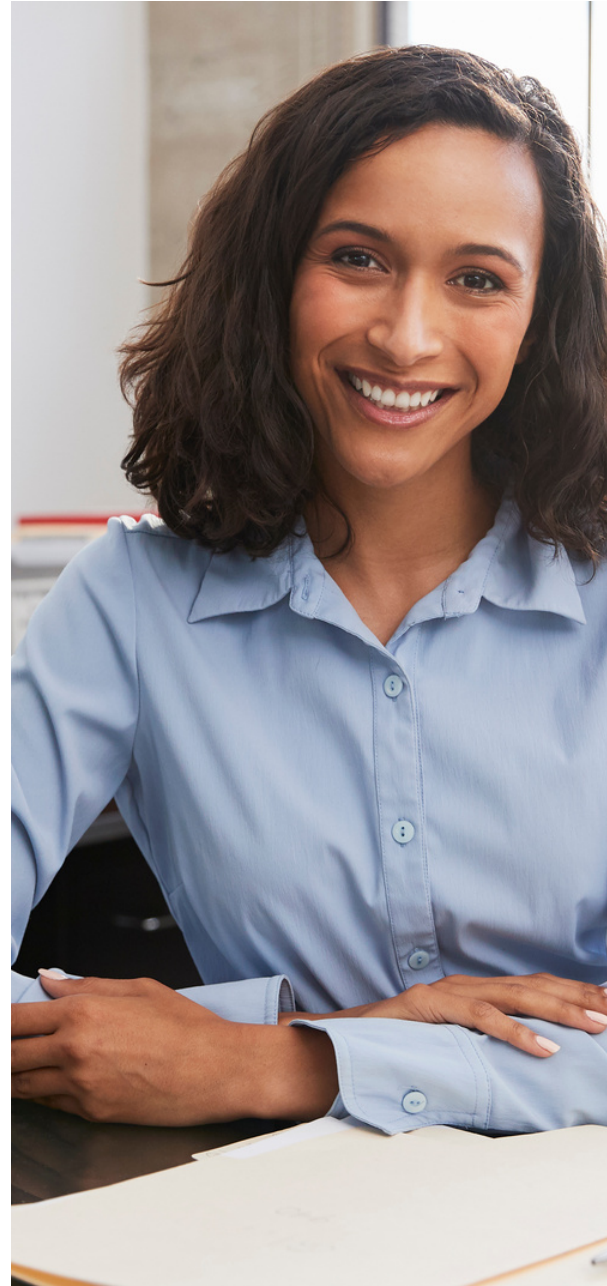
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January Checklist

☐ File and Furnish W-2 Forms

Complete By: 01/31/2026

- This may be done by your payroll company or your accountant

☐ File and Furnish 1099 Forms

Complete By: 01/31/2026

- 1099 forms for payments made of \$600 or more for services performed by nonemployees in 2025

☐ File Forms 940 and 941

Complete By: 01/31/2026

- Employer Annual Federal Unemployment (FUTA) Tax Return and Employer's Quarterly Federal Tax Return forms for 4th Quarter 2025

☐ Review Inclement Weather Policy and Plan

- Review and modify the practice inclement weather policy and plan and distribute it to staff (Sample attached)

☐ Review any new employment law changes (federal and state)

- Minimum wage, paid leave, update labor law posters
- Update IRS mileage reimbursement rate

☐ Gather information for the Top Codes survey which will be due 1/27/2026

☐ Gather information for the Salary Survey which will be due 1/27/2026

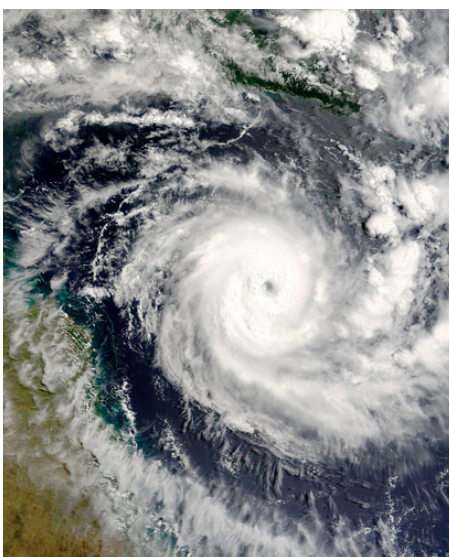
Inclement Weather Policy and Plan

The following topics should be addressed within your Inclement Weather Policy and Plan document.

Components to Include In Your Policy

Review current policy and update to include the following:

- Who makes the decision
- Criteria for closing
- Informing employees
- Paying providers and staff
- Notifying patients



Questions to Consider

- What is considered formal, acceptable communication for inclement weather updates to employees and patients
 - (Email, text, voicemail, etc.).
- How to handle PTO approval/application
 - When PTO is not approved
 - What happens when someone is currently on PTO or a leave of absence and which coincides with what may otherwise be paid leave for those scheduled to work.

February Checklist

❑ Post the OSHA Form 300A

Complete By: 02/02/2026 (Remains posted until 04/30/2026)

- If you have 10+ employees (bodies, not FTE), you must post the OSHA Form 300A (Summary of Work Related Injuries and Illnesses)
- See appendix A and/or include this link:
 - [Recordkeeping - Recordkeeping Forms | Occupational Safety and Health Administration](#)

❑ Request New W-4 Forms

Complete By: 02/15/2026

- Request a new W-4 from any employee who claims exemption from withholding
- The easiest approach may be to ask all employees to complete a new W-4 for the year

❑ Review & Update Employee Handbook/Manual

- Practice administrator should review, update, sign and date that the employee handbook/manual has been reviewed
- Distribute the updated copy of the employee handbook/manual to the employee and have the employee sign an attestation that they received it
 - If there are no updates in the employee handbook/manual, then the employee does not need to sign a new attestation
- Review of the employee handbook/manual should ideally occur annually or minimally every two years

❑ If the practice has a FSA, remind employees when the final 2025 receipts are due

- Generally are due by March 15th of the following year

❑ Gather information for the Financial Benchmarking Survey due 3/26/2026

❑ Plan staff and office celebration and appreciation events and special recognition days

OSHA's Form 300A

For organizations with 10 or more Full Time and Part Time employees, you must post the OSHA Form 300A- Summary of Work-Related Injuries and Illnesses.

OSHA's Form 300A (Rev. 04/2004)

Summary of Work-Related Injuries and Illnesses

Note: You can type input into this form and save it.
Because the forms in this recordkeeping package are "fillable/writable" PDF documents, you can type into the input form fields and then save your inputs using the [free Adobe PDF Reader](#).

Year 20

U.S. Department of Labor
Occupational Safety and Health Administration

Form approved OMB no. 1218-0176

All establishments covered by Part 1904 must complete this Summary page, even if no work-related injuries or illnesses occurred during the year. Remember to review the Log to verify that the entries are complete and accurate before completing this summary.

Using the Log, count the individual entries you made for each category. Then write the totals below, making sure you've added the entries from every page of the Log. If you had no cases, write "0."

Employees, former employees, and their representatives have the right to review the OSHA Form 300 in its entirety. They also have limited access to the OSHA Form 301 or its equivalent. See 29 CFR Part 1904.35, in OSHA's recordkeeping rule, for further details on the access provisions for these forms.

Number of Cases

Total number of deaths	Total number of cases with days away from work	Total number of cases with job transfer or restriction	Total number of other recordable cases
0	0	0	0
(G)	(H)	(I)	(J)

Number of Days

Total number of days away from work	Total number of days of job transfer or restriction
0	0
(K)	(L)

Injury and Illness Types

Total number of . . . (M)			
(1) Injuries	0	(4) Poisonings	0
(2) Skin disorders	0	(5) Hearing loss	0
(3) Respiratory conditions	0	(6) All other illnesses	0

Post this Summary page from February 1 to April 30 of the year following the year covered by the form.

Public reporting burden for this collection of information is estimated to average 58 minutes per response, including time to review the instructions, search and gather the data needed, and complete and review the collection of information. Persons are not required to respond to the collection of information unless it displays a currently valid OMB control number. If you have any comments about these estimates or any other aspects of this data collection, contact: US Department of Labor, OSHA Office of Statistical Analysis, Room N-3644, 200 Constitution Avenue, NW, Washington, DC 20210. Do not send the completed forms to this office.

Establishment information

Your establishment name

Street

City State Zip

Industry description (e.g., *Manufacture of motor truck trailers*)

North American Industrial Classification (NAICS), if known (e.g., 336212)

Employment information (If you don't have these figures, see the Worksheet on the next page to estimate.)

Annual average number of employees

Total hours worked by all employees last year

Sign here

Knowingly falsifying this document may result in a fine.

I certify that I have examined this document and that to the best of my knowledge the entries are true, accurate, and complete.

Company executive Title

Phone Date

Reset

Please refer to this [OSHA.gov resource](#) to get a copy of the forms along with instructions on how to fill out Forms for Recording Work-Related Injuries and Illnesses.

OSHA Requirements for Organizations with 10 or More Full Time and Part Time Employees

Organizations with 10 or more full time and part time employees are required to keep a record of and post a copy of serious work-related injuries and illnesses using the OSHA Form 300A.

Note: Certain [low-risk industries](#) are exempted from this requirement.

OSHA Requirements for Organizations with 100 or More Full Time and Part Time Employees

Injury Tracking Application (ITA)

Certain establishments must electronically submit to OSHA information about recordable injuries and illnesses entered on their previous calendar year's **OSHA Form 300A Summary of Work-Related Injuries and Illnesses**, **OSHA Form 300 Log of Work-Related Injuries and Illnesses**, and **301 Injury and Illness Incident Report** [29 CFR 1904.41](#). The Injury Tracking Application (ITA) is a secure website for electronically submitting your data to OSHA.

Covered Establishments

Only certain establishments are required to electronically submit information to OSHA from their injury and illness recordkeeping forms. In 2023, OSHA published a Final Rule that revised the recordkeeping regulation to require certain establishments with 100 or more employees in high-hazard industries, which were already required to submit information from the OSHA Form 300A Annual Summary, to also submit information from the OSHA Form 300 Log and the OSHA Form 301 Incident Report. The determination as to whether an employer must electronically submit recordkeeping data to OSHA is based on the number of employees and industry classification at an establishment, rather than at the firm as a whole.

Establishments covered by Federal OSHA can use the [ITA Coverage Application](#) to determine if they are required to electronically submit their injury and illness information to OSHA. Establishments covered by an OSHA-approved State Plan should directly contact their [State Plan](#).

Establishments that meet **any** of the following criteria during the previous calendar year do not need to electronically submit their information to OSHA:

- The establishment's peak employment during the previous calendar year was **19 or fewer employees**, regardless of the establishment's industry.
- The establishment's industry **is listed on [Appendix A to Subpart B](#)** of OSHA's recordkeeping regulation, regardless of the number of employees working at the establishment.
- The establishment had a peak employment **between 20 and 249 employees** during the previous calendar year **AND** the establishment's industry **is not on [Appendix A to Subpart E](#)** of OSHA's recordkeeping regulation.

*Source: OSHA.gov <https://www.osha.gov/injuryreporting/ita>

The information provided is not intended to constitute professional, billing or legal advice and is made available for general informational purposes only. Managers should contact their own counsel or advisers to obtain advice with respect to any particular matter.

March Checklist



❑ Customize Onboarding Checklist

- Ensure your practice is registered for E-Verify as part of the employee onboarding process. Refer to the screenshots on the following page for instructions on how to register

❑ Register for E-Verify (Ensure you are registered and use for every hire)

❑ Ensure that your practice is fully registered with the Office of Inspector General Website (OIG) to look up applicants.

- Refer to the screenshots on the following pages for tips on how to use the site. Examples of search results are also provided

❑ Ensure your licensed personnel have completed Mandatory Reporter Training

- Free training is available from [Stephanie V. Blank Center On-Demand Webinar Series](#)
- Mandatory Reporting
 - Georgia State law OCGA 19-7-5 states that all physicians, registered nurses and licensed practical nurses are deemed mandatory child abuse reporters. This means if you have reasonable cause to believe that suspected child abuse has occurred, you are required by law to report such abuse. New employees will receive training on mandatory reporting and retraining as appropriate.

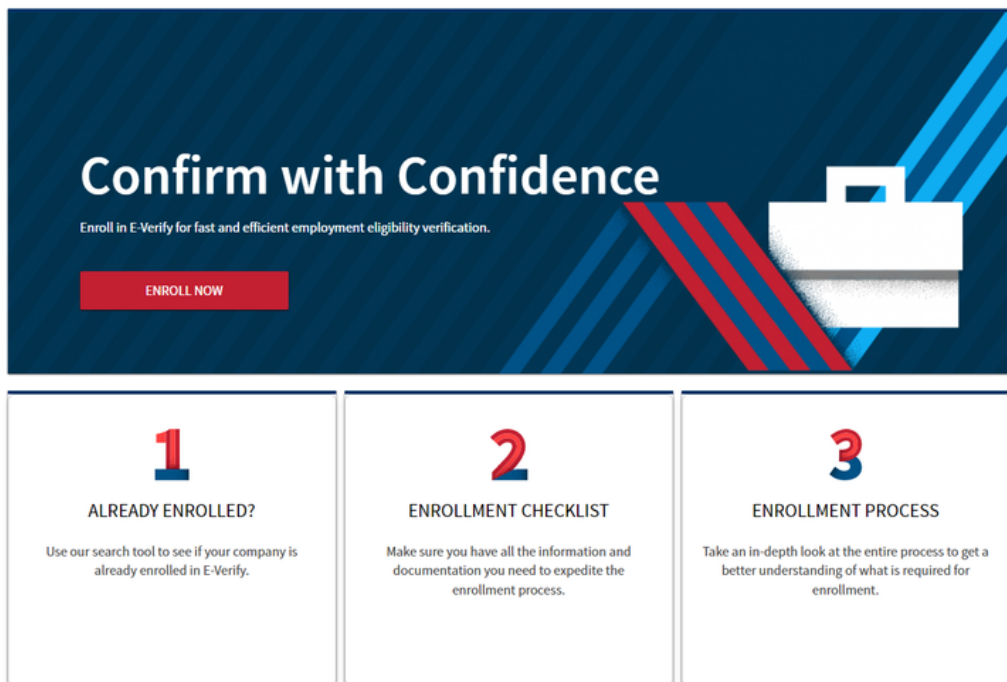
Register for E-Verify

E-Verify helps your organization complete fast and efficient employment eligibility verification

E-Verify is an Internet-based system that compares information entered by an employer from an employee's Form I-9, Employment Eligibility Verification, to records available to the U.S. Department of Homeland Security and the Social Security Administration to confirm employment eligibility.

Georgia requires that most private employers needing a Georgia business license use the federal E-Verify identification system to confirm the eligibility of new employees.

- Follow [this link](#) for additional information.

A graphic illustrating the E-Verify enrollment process. At the top, a dark blue banner with diagonal stripes contains the text "Confirm with Confidence" in white, followed by "Enroll in E-Verify for fast and efficient employment eligibility verification." and a red "ENROLL NOW" button. Below this, three white boxes with blue borders represent the steps: 1. ALREADY ENROLLED? (with a red "1"), 2. ENROLLMENT CHECKLIST (with a red "2"), and 3. ENROLLMENT PROCESS (with a red "3"). Each box contains a brief description of the step.

Confirm with Confidence
Enroll in E-Verify for fast and efficient employment eligibility verification.

ENROLL NOW

- 1**
ALREADY ENROLLED?
Use our search tool to see if your company is already enrolled in E-Verify.
- 2**
ENROLLMENT CHECKLIST
Make sure you have all the information and documentation you need to expedite the enrollment process.
- 3**
ENROLLMENT PROCESS
Take an in-depth look at the entire process to get a better understanding of what is required for enrollment.

FOLLOW THESE STEPS TO ENROLL:

- Follow [this link](#) to go to the E-Verify website
- Use the [search tool](#) to determine if your organization is already enrolled with E-Verify
 - If not, follow the steps to create a new account
- Review the [enrollment checklist](#) and have all your documentation ready to expedite the enrollment process
- Review the [enrollment process](#) to see what is required for enrollment

For additional help, refer to the [E-Verify Quick Reference Guide](#).

Register with OIG (Office of Inspector General) Website

The OIG website allows employers to check if a potential employee is excluded from working at any employer that accepts government funds

The screenshot shows the official website of the Office of Inspector General, U.S. Department of Health & Human Services. The header includes the OIG seal and a search bar for reports, topics, and keywords. A navigation menu lists various sections: About OIG, Reports & Publications, Fraud, Compliance, Exclusions, Newsroom, and Careers. The main content area is titled 'Search the Exclusions Database' and provides instructions on how to use the database. It features a search form with fields for 'Last Name' and '(and/or) First Name', and buttons for 'Search' and 'Clear'. A sidebar on the right lists 'Related Content' including LEIE Downloadable Databases, Monthly Supplement Archive, Waivers, Quick Tips, Background Information, Applying for Reinstatement, and Contact the Exclusions Program.

FOLLOW THESE STEPS TO VERIFY AN INDIVIDUAL:

- Follow [this link](#) to go to the OIG Exclusion Database website
- Use the search tool to view and verify exclusion results for an individual

Instructions

- Click in either the Last Name or First Name boxes, or both, and type part of the individual's name
- Click the Search button
- Click on the column headers to sort the results by a particular column
- In the search results list, click on an excluded individual's last name
- Review the data displayed in the verification form
- Click in the text box underneath the data table and enter the Social Security Number (SSN) provided to you by the individual
- Click on the Verify button
- The result of your verification attempt will be displayed in a message below the form

Source: U.S. Department of Health & Human Services, Office of Inspector General

<https://oig.hhs.gov/exclusions/exclusions-help.asp#generalSearch>

OIG Exclusion Results

After performing your search, if no results are found, the individual or entity is not currently restricted

An official website of the United States government. [Here's how you know >](#)

REPORT FRAUD Home • FAQs • FOIA • Contact • HEAT • Download Reader •

U.S. Department of Health & Human Services
Office of Inspector General
U.S. Department of Health & Human Services

Report #, Topic, Keyword..
Advanced

About OIG **Reports & Publications** **Fraud** **Compliance** **Exclusions** **Newsroom** **Careers**

Home > Exclusions

Visit our [tips page](#) to learn how to best use the Exclusions Database. If you experience technical difficulties, please email the webmaster at webmaster@oig.hhs.gov.

Exclusions Search Results: Individuals

No Results were found for

✕ doe , jane

If no results are found, this individual or entity (if it is an entity search) is not currently excluded. Print this Web page for your documentation

[Search Again](#)

Search conducted 2/5/2024 10:59:45 PM EST on OIG LEIE Exclusions database.
Source data updated on 1/10/2024 9:00:00 AM EST

[Return to Search](#)

Print the search results to include in the employee documentation file

For additional help, refer to the [tips page](#) on the OIG website to learn how to best use the Exclusions Database.

Mandatory Reporting Training

Georgia State law OCGA 19-7-5 states that all physicians, registered nurses and licensed practical nurses are deemed mandatory child abuse reporters. This means if you have reasonable cause to believe that suspected child abuse has occurred, you are required by law to report such abuse. New employees will receive training on mandatory reporting and retraining as appropriate.

Children's offers free Mandatory Reporting Training available through the [Stephanie V. Blank Center On-Demand Webinar Series](#).

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Children'sSM
Healthcare of Atlanta

Stephanie V. Blank Center On-Demand Webinar Series

Please select the on-demand webinar series you would like to watch:

* must provide value

Child Protection On Demand Series: Mandated Reporting

Child Trafficking On Demand Series

reset

April Checklist

☐ Ensure you have a training plan for new employees and through the end of the year

☐ Annual OSHA Training

- Mark your calendars to attend the upcoming annual OSHA Training Webinar
- Create Annual OSHA training materials and set a date for staff training to be completed

☐ Annual HIPAA Training

- Create Annual HIPAA training materials and set a date for training to be completed

☐ Annual Harassment Training

- Create annual harassment training and set a date for training to be completed (can be combined with other training)

☐ Annual Cyber/Phishing Safety Training

FOR ALL TRAINING, ENSURE YOU SAVE THE CONTENT AND SIGNATURE SHEET TO PROVE THE TRAINING

☐ Ensure you have Implemented an Employee Offboarding Checklist

- Refer to Appendix B for a sample Employee Offboarding Checklist and Appendix C for sample Exit Interview Questions
 - Note: The immediate manager may not be the best person to conduct the exit interview. The interview should be conducted by the most impartial person available
- Implement a process to ensure all checklist items are completed when an employee leaves your organization
- Periodically monitor your offboarding process and adjust as necessary

☐ Remove OSHA Form 300A Posting

Complete By: 04/30/2026

- Remove office posting for the OSHA 300A Form

☐ File Tax Form 941

Complete By: 04/30/2026

- [File Tax Form 941](#), Employer's Quarterly Federal Tax Return



May Checklist



☐ Research Laws Practice is Required to Meet (Employment Laws)

- Research the laws you are required to meet
- Even if you are not required to meet certain laws, there may be elements to each law that may still be good practice to consider implementing in your organization

☐ Americans With Disabilities Act (ADA)

- Required for organizations that have 15 or more full time employees
- Refer to the [U.S. Department of Labor](#) for additional guidance regarding the law

☐ Family Medical Leave Act (FMLA)

- Required for organizations that have 50 or more full time and part time employees
- Check out the [FMLA requirements](#) from the U.S. Department of Labor

☐ Occupational Safety and Health Administration (OSHA)

- Required for organizations that have 10 or more full time and part time employees
- Refer to the [OSHA.gov](#) website for requirements and additional resources

☐ Review the Salary Survey results to assess practice salaries and benefits

June Checklist

□ Develop a Standardized Interview Process

- Develop a list of standardized interview questions. These can include a mix of behavioral, competency-based and open-ended style questions
- Refer to this list of [Sample Interview Questions & Interview Dos and Don'ts](#)
 - *information from SHRM website- www.shrm.com

□ Educate Staff on What Questions Can and Cannot Be Asked During an Interview

- Review the following infographic on acceptable vs unacceptable interview questions
- Educate staff to ensure that all interviewing parties are aware of what questions can and cannot be asked during an interview
- Review the Financial Benchmarking results for any practice issues to address



ACCEPTABLE v s UNACCEPTABLE

INTERVIEW QUESTIONS

*Source: <https://joinhomebase.com/blog/acceptable-and-unacceptable-interview-questions-to-ask-candidates/>

Name

- “Have you ever worked for this company under another name?”

- “Have you had any other names?”
- “What is your maiden name?”

Why: Asking about a change in last name could lead to learning if an employee is married or unmarried. It is illegal in several states to discriminate against someone for their marital status.

Birthplace

- There are no acceptable questions surrounding an applicant's birthplace.

- “Where were you born?”
- “Where were your parents born?”

Why: Again, there are no acceptable questions about where a candidate was born because it could potentially lead to the belief that you discriminated against their nationality.

Age

- “Are you over 18 years of age?” If you're interviewing for a driver, you can ask if the applicant is over 21 years of age.

- “How old are you?” Any questions you gear towards figuring out the age of the applicant are unacceptable.

Why: The only time it is acceptable to ask how old an applicant is, is if the job requires an employee of a certain age, otherwise, the applicant can see it as ageism. Some applicants will put a date of birth on their resume.

Religion

- There are no acceptable questions surrounding an applicant's religion.

- Any questions about a person's religion or what days they may need off for religious holidays are unacceptable.

Why: You are prohibited by law from discriminating against an employee on the basis of religion.

Work Schedule

- “Can you meet the attendance requirements of the position for which you're applying?”

- “Do you have any health conditions that would lead to absences from work?”

Why: It is against the law to discriminate against an applicant due to their potential disability.

Race

- There are no acceptable questions about the applicant's race or color.

- Any questions that are geared towards determining the race of the applicant are unacceptable.

Why: Trying to figure out an applicant's race could lead to the assumption that you are discriminating against them because of their answer.

ACCEPTABLE v s UNACCEPTABLE

INTERVIEW QUESTIONS

*Source: <https://joinhomebase.com/blog/acceptable-and-unacceptable-interview-questions-to-ask-candidates/>

Citizenship

- “Will you be able to prove you are employable if you are offered the job?”

- “What nationality are you?”

Why: Again, discriminating against an applicant because of their nationality is illegal, however, most jobs in the United States require candidates to be a U.S. citizen.

National Origin

- “What languages can you read, write or speak?”
“How fluent are you?”

- Any questions about an applicant’s lineage or date of entry into the U.S.

Why: Again, there are no acceptable questions about where a candidate was born because it could potentially lead to the belief that you discriminated against their nationality.

Education

- “Tell me about your educational background.”

- “When did you graduate high school?”
• “When did you receive your degree?”

Why: This again pertains to discriminating against someone because of their age.

Experience

- “What is your work experience?” “Do you have experience with the U.S. Armed Forces?” “Why did you leave your last job?”

- “What type of discharge did you receive from the military?”

Why: Laws prohibit you from discriminating against military members who were honorably discharged, but you may also run into discrimination trouble if the applicant’s discharge was less than honorable.

Relatives

- “Do any of your relatives work for the company?”
“What are their names?”

- “Are you married?”
• “What relatives live with you?” “With whom do you reside?”

Why: This line of questioning could lead to uncovering if the applicant is married or has children, which can be illegal to discriminate against.

Physical Condition

- “Can you perform the essential functions of the position for which you are interviewing?”

- “Are you disabled?”
• “Are you healthy?”
• Any questions concerning Workers’ Compensation claims are also unacceptable.

Why: Again, it is illegal to discriminate against an applicant for their potential disability.

July Checklist



□ Review Employee Personnel Files

- Ensure that all required employee information files are completed
- All personnel files are confidential and must be kept in a secure place
- Confirm that the I-9 form is not located in the personnel folder
- Confirm that there are no medical documents in the personnel folder
- Medical documents such as doctor-signed work excuse notes should be placed in a separate file
- Update the practice P&P on staff required immunizations and ensure all staff records are compliant

□ File Tax Form 941

Complete By: 07/31/2026

- [File Tax Form 941](#), Employer's Quarterly Federal Tax Return

August Checklist

❑ Flexible Spending Account Reminders

- Review your Flexible Spending Account (FSA) policy to determine if employees are required to use their FSA deductions by a certain date (generally by the end of the year with a grace period), or if your FSA policy allows the employee to carry over a specific amount into the next year
- Send out reminders to employees about the terms of your practice's FSA policy
- Send out reminders to employees to use their FSA money if your FSA policy states they will lose it by the end of the year

❑ Check Business and Workers Compensation Insurance Policies

- Review your policies and ensure your limits cover existing needs

❑ Ensure the current Federal and State Regulations are posted in an area that staff can access and you have a mechanism for receiving and posting updates throughout the year



September Checklist



□ Review and Update PTO Policy

- Review with your staff the policy and procedure regarding PTO
- Topics to review include:
 - Unused PTO
 - If the employee has no PTO
 - Requesting PTO around the holidays (Nov/Dec)

October Checklist

□ Plan for Employee Insurance Open Enrollment

- If January is your organization's insurance effective renewal date, start planning for open enrollment now
- If you participate in the TCCN Health Insurance, ensure you have a Benefits Champion in place

□ Provide Medicare Part D Notices

- Provide Medicare Part D Notices to Insurance Plan Participants

□ File Tax Form 941

- [File Tax Form 941](#), Employer's Quarterly Federal Tax Return



November Checklist



□ Attend Coding Seminar

- Register for and attend the annual Coding Seminar

□ Employee Insurance Verification

- Remind employees to verify their address for insurance benefits and HR/Payroll (to receive W-2 forms)

□ Review Inclement Weather Policy and Plan

- Review and modify the practice inclement weather policy and plan and distribute to staff
- Refer to page 2 of this document for topics that should be addressed in your Inclement Weather Policy and Plan document

December Checklist

□ Send Year-End Employee Reminders

- Remind all employees to verify their correct address for the payroll system (W-2) and any other systems that will be issuing reports

□ Prepare to Participate in Annual KHF Benchmarking Surveys

- Consider participating in the annual KHF Benchmarking Surveys at the start of the new year
- Benchmarking reports include:
 - Top Codes - Aggregate list of the most used codes from the previous year
 - Salary Survey - View the most current pediatric salary and benefit trends in the metro Atlanta area
 - Practice Benchmarking Survey - Measure your practice's financial picture



Employee Onboarding Checklist

Pre-Work

	Date Completed:	Completed By: (Name of HR Manager)	Employee Initials
☐ Offer Letter	_____	_____	_____
☐ Criminal Background Check	_____	_____	_____
☐ Drug Test (if required)	_____	_____	_____

Day One

	Date Completed:	Completed By: (Name of HR Manager)	Employee Initials
☐ I-9 Form	_____	_____	_____
☐ Complete E-Verify	_____	_____	_____
☐ OIG Exclusion Verification	_____	_____	_____
☐ Federal (W-4) and State Tax Forms	_____	_____	_____
☐ Payment Enrollment Forms	_____	_____	_____
☐ Time Clock Location and Policy	_____	_____	_____
☐ Work Schedules (including lunch/break, requesting time off, etc.)	_____	_____	_____
☐ Introduction to staff and doctors	_____	_____	_____
☐ Parking area, parking card, and parking policy	_____	_____	_____
☐ Review Job Description and Have Employee Sign	_____	_____	_____

Day Two

	Date Completed:	Completed By: (Name of HR Manager)	Employee Initials
☐ Signature for Employee Handbook	_____	_____	_____
☐ Signature for Office Policies & Procedures	_____	_____	_____
☐ HIPAA Review and Signature	_____	_____	_____
☐ OSHA Review and Signature	_____	_____	_____
☐ Assignment of a “buddy”	_____	_____	_____
☐ Password to PM / EMR	_____	_____	_____

Employee Offboarding Checklist

	Date Completed:	Completed By:
☐ Terminate passwords to PM/EMR and any other electronics, email		
☐ Retrieve Employee Parking Card		
☐ Return of any practice electronics		
☐ Return of keys to office		
☐ Return of uniforms		
☐ Complete GA-DOL Separation Notice and provide to employee (see sample) If employee is not available, mail (<i>ideally through certified mail</i>)		
☐ Complete an exit interview (see sample)		
☐ Inform employee of next steps with regard to COBRA and their 401K account		
☐ Inform doctors and practice staff of the upcoming change and how the employee's duties will be managed		

EMPLOYEE EXIT INTERVIEW FORM

Employee
Name:

Date:

Practice Name:

Interview
Conducted By:

Why are you leaving or what led you to the decision to leave?

What is the new job offering that we don't?

How do you feel about management/the practice/doctors and do you have any suggestions for improvement?

Do you feel you received proper and ongoing training? Any feedback?

Did you feel valued and appreciated? Any suggestions for improvement?

If you could change anything, what would it be?

What would have made you stay?