A BRIDGE TO INDEPENDENCE

Elevate WELLNESS AGENCY, LLC

RESIDENTIAL New Employee OnBoarding &Training Checklist

MUST BE COMPLETED DURING PROGRAM COORDINATOR ONBOARDING TRAINING AND TURNED IN SAME DAY

Complete packet available on Egnyte / Employee Documents & Training / HR Onboarding Documents

New Hire Name: Kristen Ottman Phone Number: 218-380-1391

Locations: Aspen

Description	Date Completed	Employee Initials	Supervisor Initials
Human Resources			
New Employee Offer Letter completed - Training & Department Notified	10/2/25	KMO	TP
Verify Employee Drivers License			
Background Study Completed	10/2/25		TP
Employee File Created (Egnyte)	10/2/25		TP
Employee Gusto Account Created	10/2/25		TP
Employee Deputy Account Created	10/2/25		TP
Employee R-Task Account Created	10/2/25		TP
Add Employee to Employee Master Log	10/2/25		TP
Notify Accounting to Add Benefits if Requested	10/2/25		TP
Review & Sign Job Description	10/2/25	KMO	TP

Training Department			
Employee STAR Account Created			
Complete Deputy Training : Time Off, News Feed Posting & Confirmation	6-9-25	KMO	
Complete Gusto Training : Time Off, Expenses (Sleep Noc & Mileage)	6-9-25	KMO	
Star Training	6-9-25	KMO	
Program Coordinator			
Scheduling & Scheduling requirements (Deputy/Gusto)	6-9-25	KMO	
Person Centered Practices & Plans : General Info	6-9-25	KMO	
Agency Passes & Activities	6-9-25	KMO	
Orientation on Team Meetings & Requirements	6-9-25	KMO	
Outings & Activities	6-9-25	KMO	
Maintenance Needs	6-9-25	KMO	
Emergency Binder: Fire Drill, Water Temps, Incident Reports Including Injury & Serious Injury & Quarterly Emergency Procedure.	6-9-25	KMO	
Data Tracking & Managing Goals	6-9-25	KMO	
Concurrent Documentation & Daily Notes	6-9-25	KMO	
Daily House Task & Checklists	6-9-25	KMO	
Funds Management & Money Logs	6-9-25	KMO	
Menus & Food Preparation	6-9-25	KMO	
Daily Communication Logs	6-9-25	KMO	

Appointment Communications Logs - Med Loh Book: PRN Documentation, Appt Logs, Meds Received/Ordered, Receiving Narcotics (Narc Sheet), Standing Order Sheet, Med Error Form, Med Set-Up Record (meds sent out of sheet).	6-9-25	KLO	ay
R-Task Specific Training Needs: Notes, Meds, Clinical (meds sent out of facility, narc count, narcs received).	6-9-25	KLO	ay
Orientation To Individual's Needs (must sign the client acknowledgment once completed)	6-9-25	KLO	ay
Make Sure The Packet Is Complete, Staff Initialed and Signed, Then Signed & Turned Into Training Director.	6-9-25	KLO	ay

On the date listed I certify that I have been trained in the above topics, understand these policies & processes, and agree to follow them through my employment at Elevate Wellness Agency.

Employee: KLOutler Date : 6/9/25

Supervisor: Chris Lavoy Date: 6-9-25