

NEW EMPLOYEE GUIDE

New Employee Onboarding Experience

TALENT MANAGEMENT



Onboarding is not a Human Resources task nor a one-time event; it is the personalized experience of being set up for success by **one's team and the leader**.



FROM THE OFFICE OF
Jim Whitling
Chief HR Officer

Dear New Employee,

We are excited to welcome you to the ChenMed family!

What sets ChenMed apart is our genuine passion for serving and delivering better outcomes. All of us chose to join ChenMed – of all the places we could work – because we share a calling to honor seniors with affordable, VIP healthcare that delivers better health. That calling extends to honoring each other with a best in class work experience.

That experience begins with the first interaction. It continues with clear expectations, a supportive team, and regular feedback. As a new employee, we encourage you to take ownership of your onboarding experience. The enclosed guide will help you do just that.

The guide includes the following:

- New employee checklist
- Outline of formal check-ins at week 1, 30 days, 60 days, and 90 days
- List of helpful resources
- ChenMed behavioral competencies and performance rating scale

While your leader will guide your overall onboarding experience, it is you who knows best what you will need and what questions you will have along the way. Take charge of your experience and ensure you're getting what you need to be successful.

Together we are positively changing American healthcare, one experience at a time. Thank you for taking this journey with us.

In service to you and with best wishes,

Jim Whitling
Chief Human Resources Officer

“Take charge of your experience and ensure you're getting what you need to be successful.”

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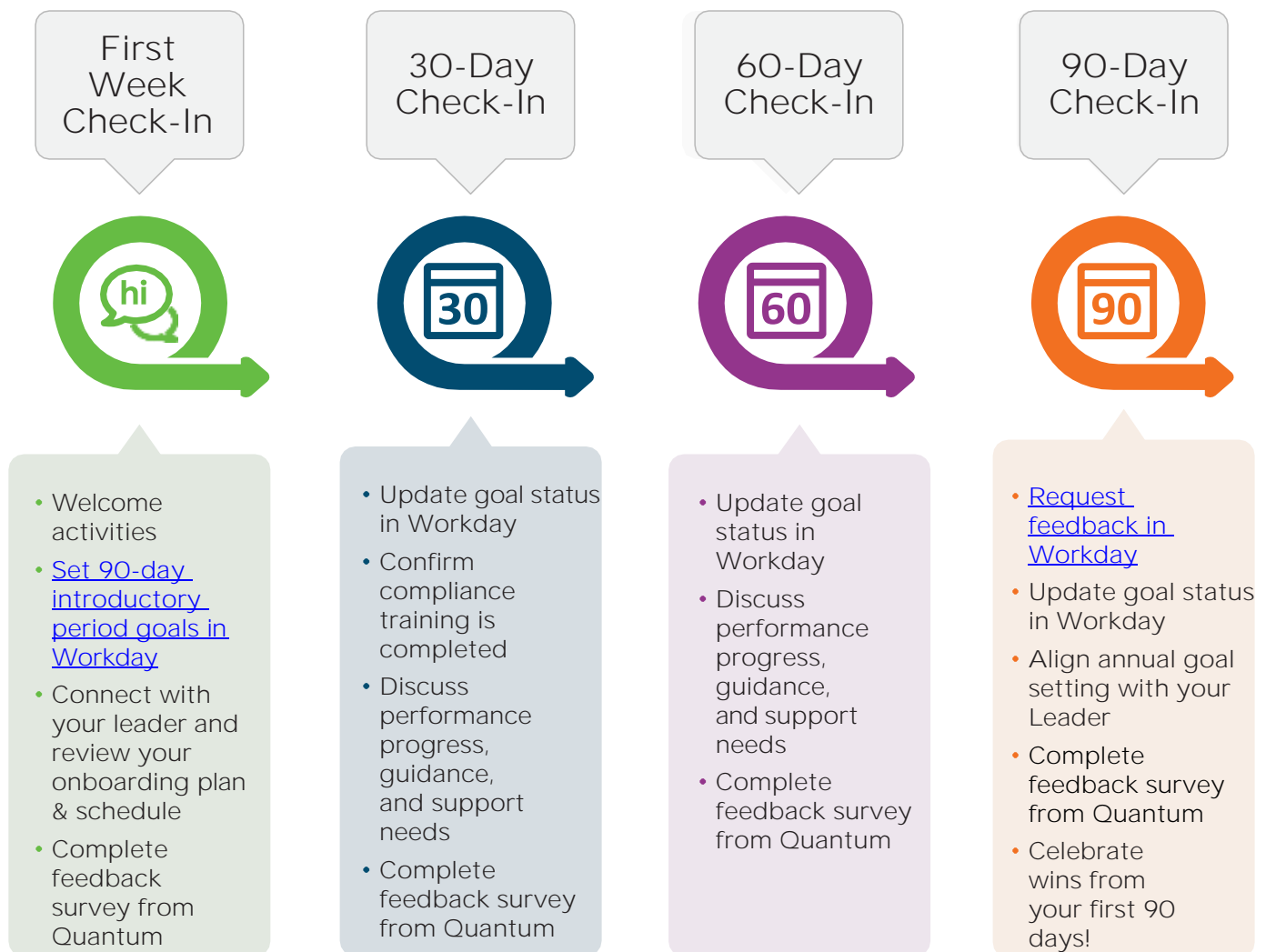
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Standardized Onboarding Approach

A structured onboarding program designed to help a new employee successfully integrate into their role, accelerate performance, and acclimate into our culture of service during the 90-day introductory period. Successful onboarding is a partnership between the new employee and their leader.

Components of the New-Hire Experience

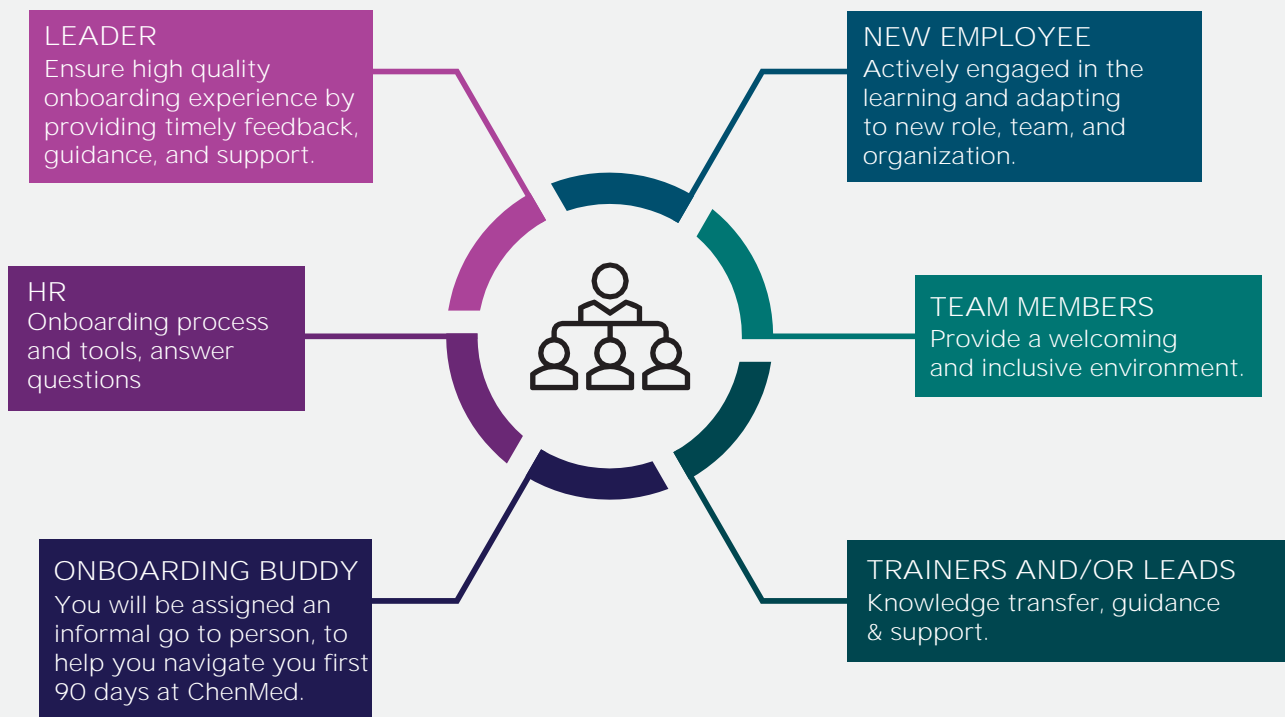
The following onboarding activities help you thrive as a new ChenMed employee:



Onboarding Support Network

Effective onboarding is a partnership and shared responsibility between the leader and new employee. You will also rely on several people to enable a successful transition. These individuals may play a formal or informal role as a guide and advisor as you move through the onboarding process. The goal is to help you integrate into your role, team, and organization.

Roles and Responsibilities



New Employee's Onboarding Checklist

During the introductory period, you are learning about your new role, team, and the organization's culture. You are responsible for your career success. Take the initiative, be engaged, network with team members and key partners, and learn about our culture of service. This checklist provides a list of onboarding activities, items, and topics for review you need to thrive at ChenMed.

First Day/ Week	
Verify your information	
<ul style="list-style-type: none"> <input type="checkbox"/> Attend ChenMed Orientation 	<ul style="list-style-type: none"> <input type="checkbox"/> Access OLIN and complete all environmental, Health and safety compliance training modules
<ul style="list-style-type: none"> <input type="checkbox"/> After new hire orientation/training, you should have: <ul style="list-style-type: none"> <input type="checkbox"/> System logins <input type="checkbox"/> Change all system passwords 	<ul style="list-style-type: none"> <input type="checkbox"/> Obtain your employee ID, and access badge (if applicable)
<ul style="list-style-type: none"> <input type="checkbox"/> Access Workday and complete the following: <ul style="list-style-type: none"> <input type="checkbox"/> W4 tax withholding form <input type="checkbox"/> Direct deposit authorization (if elected) <input type="checkbox"/> Emergency contact information <input type="checkbox"/> Punch in time entry 	<ul style="list-style-type: none"> <input type="checkbox"/> Get a tour of the center/building/workspace
	<ul style="list-style-type: none"> <input type="checkbox"/> Set up your Outlook email and signature
	<ul style="list-style-type: none"> <input type="checkbox"/> Confirm your schedule of first week activities
	<ul style="list-style-type: none"> <input type="checkbox"/> Confirm you have equipment, supplies, contact info, etc. needed, reach out to your Leader, Buddy, or HRBP with any questions.
Making Connections	
<ul style="list-style-type: none"> <input type="checkbox"/> Attend welcome breakfast or lunch with hiring leader and/or team 	<ul style="list-style-type: none"> <input type="checkbox"/> Introduce yourself to the team – first impressions matter!
<ul style="list-style-type: none"> <input type="checkbox"/> Meet with your leader (1st Check-in)- During your first 1:1 make sure you and your leader are clear job and performance expectations in the first 90 days. 	<ul style="list-style-type: none"> <input type="checkbox"/> Meet your buddy, peer, or mentor <input type="checkbox"/> Schedule meet and greets with key people in the organization
<ul style="list-style-type: none"> <input type="checkbox"/> Ask your leader to share the organization's and team's goals, your job description 	<ul style="list-style-type: none"> <input type="checkbox"/> Provide feedback on your onboarding plan and execute first week activities.
<ul style="list-style-type: none"> <input type="checkbox"/> Get to know your leader's work style, communication style, and expectations 	
<ul style="list-style-type: none"> <input type="checkbox"/> Check your email to provide Feedback on your first week from support@Quantumworkplace.com 	

First 30-days	
2nd Check-in	
○ Connect with your buddy, or peer regularly to ask questions, get guidance, and support	Ask for additional support and/or guidance as needed
○ Participate in the 30-Day Check-In Discussion with your leader: Discuss your accomplishments, ask for feedback on your performance to date; what you should continue to do more of, less of	○ Execute Onboarding plan activities: <ul style="list-style-type: none"> ○ Complete all required trainings in OLIN ○ Order Business Cards ○ Enroll in benefits
○ Check your email to provide Feedback on your first 30 days from support@Quantumworkplace.com	○ Review 90-Day Introductory Period goals & document goal status and comments in Workday
First 60-days	
3rd Check-in	
○ Participate in the 60-Day Check-In discussion with your leader:	○ Ask for additional support and/or guidance needed
○ Discuss your accomplishments, use Workday to ask for feedback on your performance to date; what you should continue to do more of, less of	○ Complete Employee Profile in Workday ○ Update Goal progress in Workday
○ Check your email to provide Feedback on your first 60 days from support@Quantumworkplace.com	
First 90-days	
4th Check-in	
○ Follow up with your onboarding buddy, peer mentor, or preceptor to get feedback on your progress	○ Schedule regular ongoing 1:1 meeting with your leader throughout the year at least monthly.
○ Meet with your leader for a 90 Day Check-In Discussion (prior to 90-days of hire)	○ Discuss and set your goals for the year and update status regularly in Workday
○ Review 90-Day Introductory Period goals – document goal progress and comments in Workday	○ Familiarize yourself with the company and industry leveraging the recommendations for business acumen; add activities to Development Goals on Workday
○ Check your email to provide Feedback on your first 90 days from support@Quantumworkplace.com	○ Celebrate successfully completing your introductory period!

Business Acumen Recommendations

Instructions: Below are several recommendations for building your business acumen over the course of your first 90 days with ChenMed and onward. You can also search for online or in-person courses on OLIN, relevant to the topic of your choice.

Consider adding the activity you choose to your Development Goals in Workday. Make sure to align with your supervisor or manager ahead of time for any required approvals.

Key Deliverables:

ChenMed	Supporting Growth	Self-Development & Leadership Skills
<ul style="list-style-type: none"> • Review the ChenMed portal daily or weekly (see information in the resources section) • Watch the Message from the CEO & In case you missed it emails. • Watch the EVERYONE WINS podcast series • Learn about our service process 	<ul style="list-style-type: none"> • Complete a ride-along with an MGC to learn about supporting our thematic goal. • Join our mailing list! Subscribe here • Get involved with a professional organization (e.g. American Medical Association) • Stay connected to industry trend data with NPR news, Science Daily, Stat news, JAMA Internal Medicine, Science Magazine, etc. • Learn more about Medicare advantage at www.medicare.gov • Become certified in OPS Essentials, Daily Standup • Refer a patient or employee here 	<ul style="list-style-type: none"> • Become an Onboarding Buddy (connect with your leader or HRBP for more info)! • Attend a Toastmasters International workshop • Visit www.123test.com for various self-assessments • Read a book! Suggestions: <ul style="list-style-type: none"> ○ <i>The 7 Habits of Highly Effective People</i> by Stephen R. Covey ○ <i>Emotional Intelligence 2.0</i> by Travis Bradberry & Jean Greaves ○ <i>The Five Dysfunctions of a Team</i> by Patrick Lencioni ○ <i>Financial Information Made Easy</i> by Robert Dransfield

First Week Check-In Discussion Guide

Instructions: Use this as a guide to facilitate a meaningful conversation with your leader during the first week. The goal is to help new employees' transition into the role, accelerate performance and acclimate into our service culture.

Key Deliverables:

- Get to know your leader and team
- Review onboarding plan and schedule
- Set 90-day introductory period goals in Workday

WELCOME	<ul style="list-style-type: none"> • Meet your leader and team. • Get settled in your work area. • Review and discuss first week onboarding activities. • Provide feedback to your support network to help us improve the onboarding experience and document in the Quantum survey.
BUILDING RELATIONSHIPS	<p>Discussion Points:</p> <ul style="list-style-type: none"> • Discuss orientation experience and key take-aways. • Share your work and communication style. • Exchange contact information, if appropriate. <p>Share the following:</p> <ul style="list-style-type: none"> • What expectations do you have of your leaders? • How do you like to be recognized? • How would you like to receive feedback? • What are your career aspirations?
SET 90-DAY INTRODUCTORY PERIOD GOALS	<ul style="list-style-type: none"> • Work with your leader to add 90-day introductory period goals in Workday. • Example: To jump start your success at ChenMed the following activities should be completed within the first 90 days: <ol style="list-style-type: none"> 1. Complete all required compliance training by end of week 1. 2. Schedule meet and greets with identified peers, leaders, & others. to establish relationships, learn about their functions, and the ChenMed culture within the first 30 days. 3. Job shadow peers for knowledge transfer.
REFERENCE MATERIALS	<ul style="list-style-type: none"> • Writing SMART Goals Reference Guide • Add a Performance Goal

30-Day Check-In Discussion Guide

Instructions: Use this as a guide to facilitate a meaningful conversation with your leader during the first thirty days. The goal is to help new employees successfully transition into the role, accelerate performance, and acclimate into our service culture.

Key Deliverables:

- Get to know your leader and team
- Discuss performance goal status, guidance, and support needs
- Summarize the discussion and document in Workday
- Provide feedback to your support network and document in the Quantum survey

<p>PREPARE Reflect on your first 30 days at ChenMed.</p>	<ul style="list-style-type: none"> • Impressions of the team and work environment • Progress made on introductory period goals • Your strengths and development areas • Potential support and resources needed
<p>ENGAGE Engage in a meaningful conversation focused on driving performance.</p>	<p>Discussion Questions</p> <ul style="list-style-type: none"> • How is it going? How do you feel in your new job? • What do you consider to be your most important accomplishments/ contributions? • What has challenged you most? • Is the job/team/company what you expected? • What questions do you have concerning your training? • What questions do you have concerning what is expected of you on the job? Goals? Priorities? • What progress have you made on your goals? • Do you feel like you have gotten to know your coworkers well? • What can we do to improve your onboarding experience? • What support do you need? • How can I be more helpful to you? <p>Driving Performance</p> <ul style="list-style-type: none"> • Discuss performance feedback, guidance, and support. • Review onboarding plan, learning activities, and next steps.
<p>REFERENCE MATERIALS</p>	<ul style="list-style-type: none"> • Problem Solving strategic thinking & Feedback Toolkit • Adding Performance Goal Status • Order Materials such as Business cards or marketing materials_____

60-Day Check-In Discussion Guide

Instructions: Use this as a guide to facilitate a meaningful conversation with your leader at or around the 60th day of employment. The goal is to help new employees successfully transition into the role, accelerate performance, and acclimate into our service culture.

Key Deliverables:

- Review and discuss onboarding progress
- Discuss performance goal status, align on guidance, support, and development needs
- Summarize the discussion and document in Workday
- Provide feedback to your support network and document in the Quantum survey

Step 1: Align 90-Day Introductory Period Goals - Ask your Leader about your goals around results and relationships, then discuss how goal progress is monitored and performance is measured in your area.

Step 2: Review Behavioral and Technical Competencies - Review, discuss, and provide self-assessment on competencies. (See the ChenMed Behavioral Competencies later in this guide.)

Step 3: Summarize and Plan Next Steps - Summarize overall performance, strengths, goal progress, and action plan. Review onboarding plan. Schedule a follow up meeting before the 90th day of employment.

Step 4: Document 60-Day Check-In Discussion - Update goal progress and add comments summarizing the discussion (step 3) in Workday. Job Aid: Adding Performance Goal Status.

Step 5: Complete your internal resume in Workday - Update the career section of your Workday profile and align on development needs with your support network.

REFERENCE
MATERIALS

- [Updating your employee profile](#)

90-Day Check-In Discussion Guide

Instructions: Use this as a guide to facilitate a meaningful conversation with your leader at or around the 90th day of employment. The goal is to help new employees successfully transition into the role, accelerate performance, and acclimate into our service culture. Before the meeting, get performance feedback from trainers, peers, leads, and others. Job aid: Get Feedback on Self.

Key Deliverables:

- Review and discuss onboarding progress
- Discuss performance accomplishments and ongoing guidance, and support needs
- Set performance goals for the remainder of the year
- Provide feedback to your support network and document in the Quantum survey
- Celebrate successful completion of introductory period!

Step 1: Review 90-Day Introductory Period Goals – Assess, rate (using the Performance Rating Scale) and provide performance feedback on goal progress.

Step 2: Discuss Behavioral and Technical Competencies – Assess, rate (using language from the ChenMed Behavioral Competencies and Performance Rating Scale) and provide feedback on behavioral and technical competencies.

Step 3: Summarize Ratings and Plan Next Steps – Summarize overall performance, discuss strengths, development opportunities, and next steps. Review onboarding plan.

Step 4: Document 60-Day Check-In Discussion – Update goal progress and add comments summarizing the discussion (step 3) in Workday. Job Aid: Adding Performance Goal Status.

Step 5: Set Performance Goals for the Year – Discuss goals for the year and how success will be measured. Add goals in Workday. Job Aids: Writing SMART Goals Reference Guide and Add a Performance Goal.

REFERENCE
MATERIALS

- [ChenMed Behavioral Competencies & Performance Rating Scale](#)

Tool: Culture Assimilation Activities

Instructions: ChenMed’s culture is made up of the values, beliefs, mindsets, and behaviors shared by our people. It shapes the way we deliver service to our patients and each other. As employees, it is important to understand that our words, actions, and behaviors should reflect the ChenMed culture. Use this tool to learn, understand, and integrate to the ChenMed culture.

ACTIVITY	EASY TO APPLY STRATEGIES
ONE-ON-ONE MEETINGS	<p>Culture Interview Questions</p> <ul style="list-style-type: none"> • How would you describe the organization’s culture? • How do employees demonstrate the core values? • How are people recognized? • Do people eat lunch together or solo/at their desks? • Do people participate in team building activities?
PEER ADVICE MEETINGS	<p>Peer Conversation Topics:</p> <ul style="list-style-type: none"> • What is unique about working at ChenMed? • Describe how your role contributes to the ChenMed mission. • Describe your own perception of the ChenMed culture and environment. • What should I keep in mind to be successful? • What should I avoid?
OBSERVE THE CULTURE	<p>People Watch</p> <ul style="list-style-type: none"> • Observe people interacting with one another and our patients • How do people communicate: face-to-face or email? • Pay attention to communication: verbal, nonverbal, and email • See how meetings are conducted • Watch for emotions, tone of voice, formalities, and mannerisms • Observe team dynamics <p>Culture Walk:</p> <ul style="list-style-type: none"> • Walk around the building look at objects and artifacts that sit on desks and hang on walls • Notice office, meeting rooms, and staff lounge set up • Read items posted on bulletin boards
ENGAGE IN EVENTS	<p>Culture Events:</p> <ul style="list-style-type: none"> • Get involved in your teams’ culture and employee engagement events. Talk to your HRBP or Leader around our Culture Ambassador program.

Helpful Resources

Name	Description	Link or Contact Information
Human Resources Total Rewards	Outlook email for Benefits, Payroll & HR related questions Wellness Resources	<ul style="list-style-type: none"> • AskHR@chenmed.com • Visit: https://home.chenmed.com/staying-well/
Employee Relations	For employee relationship questions	<ul style="list-style-type: none"> • Larry Cardella, ext. 79740 or Lawrence.Cardella@chenmed.com • Alex Sensat, ext. 79330 or Alexandra.Sensat@chenmed.com
Employee Services	Policies SOPs & Guidelines For all HR related questions	<ul style="list-style-type: none"> • Visit: https://home.chenmed.com/human-resources-2/ & https://chenmed.service-now.com/hrsp
Talent Management	<ul style="list-style-type: none"> • Step by Step instructions on how to request feedback from team members, set, enter track performance, and manage your career. • Career Pathways 	<ul style="list-style-type: none"> • Managing your performance & Tools • Managing your Career & Tools • Visit https://careers.chenmed.com/i/us/en/welcome_for_career_pathways!
IT Support	IT support portal	<ul style="list-style-type: none"> • Visit: https://chenmed.service-now.com/
Learning & Development	<ul style="list-style-type: none"> • E-learning & trainings • To plan for and guide your conversations 	<ul style="list-style-type: none"> • Masterful Conversations- Giving and Receiving Feedback • OLIN: https://www.chenmedlearning.com/ • Contact OLIN@chenmed.com for support
Purchasing (note: for those employees who complete purchasing tasks on behalf of the organization)	<ul style="list-style-type: none"> • Purchasing resource • Expensing P-card transitions • Step by Step instructions on how to order supplies, equipment, etc. 	<p>Purchasing Page contacts: Andrew Gordon - Purchasing Manager purchase@chenmed.com</p> <p>For P-card questions: Rebecca Molina, Purchasing Coordinator at ext. 79292 or email rebecca.molina@chenmed.com</p> <p>For Supplies questions Jorge Vidal, Purchasing Specialist at ext. 79285 or email jorge.vidal@chenmed.com</p> <p>Job Aids:</p> <ul style="list-style-type: none"> • Purchasing - Office Depot • Creating Requisitions from catalog items • Employee Expensing P-card Transactions • Ad-Hoc Requisition
Signature & Networking	Step by step guide to set up your Outlook Signature Order business cards	<ul style="list-style-type: none"> • Visit: OneChenMed.com "Update your Email Signature" in the upper left on the page* • Submit an order for business cards (contact your local admin for assistance).
Apps Portal Workday	All System Apps Workday System job aids	<ul style="list-style-type: none"> • Visit: https://auth.chenmed.com/Apps/SecureAuth.aspx & https://chenmed.sharepoint.com/Pages/Workday-Learning.aspx
News & Events	Stay abreast of ChenMed events & Industry news	<ul style="list-style-type: none"> • Visit: https://home.chenmed.com/ & https://www.chenmed.com/resources
Culture Events	Get involved in ChenMed activities	<ul style="list-style-type: none"> • Visit: https://home.chenmed.com/category/newsletter • Contact culture@chenmed.com for more info

*links will be available once connected to amazon workspace or work devices (use your Windows login for access)

Tool: Performance Rating Scale

Instructions: Use this tool to learn how performance is rated during the quarterly review at ChenMed.

QUARTERLY CHECK-IN RATINGS & LINK TO ANNUAL RATINGS		
Off-Track	On-Track	Better Than Expected
<ul style="list-style-type: none"> • Is meeting few or no goals and/or are not effectively demonstrating the ChenMed values and behaviors. • Multiple reviews at this rating could indicate a likely Inconsistent Performance or Underperformance rating on the Year-end review. 	<ul style="list-style-type: none"> • Is meeting most to all of goals and demonstrating most to all of the ChenMed Values and Behaviors. • Multiple reviews at this rating could indicate a likely Solid or Strong Performance rating on the year-end review. 	<ul style="list-style-type: none"> • Is meeting all or exceeding all goals and ChenMed Values and Behaviors. • Multiple quarterly check-ins of this rating could indicate a likely Strong or Outstanding Performance on the year-end review.

Instructions: Use this tool to learn how performance is rated during the annual review at ChenMed.

ANNUAL PERFORMANCE RATINGS				
Underperformance	Inconsistent Performance	Solid Performance	Strong Performance	Outstanding Performance
<ul style="list-style-type: none"> • Consistently underperforms despite development efforts. • Does not demonstrate a basic understanding of and/or applies the ChenMed behavior expectations (competencies) required to succeed in the role. • Does not deliver expected performance outcomes (metrics, KPIs, goal targets, or basic job activities) required to succeed in the role. 	<ul style="list-style-type: none"> • Inconsistently demonstrates the ChenMed behavior expectations (competencies) required to succeed in the role. • Delivers some of the performance outcomes (metrics, KPIs, goal targets, or job activities) over the course of the year. • Requires improvement to become a consistent performer. 	<ul style="list-style-type: none"> • Generally demonstrates the ChenMed behavior expectations (competencies) required to succeed in the role. • Delivers most to all of the performance outcomes (metrics, KPIs, goal targets, or job activities) over the course of the year. • May require some coaching in targeted areas but is a solid performer. 	<ul style="list-style-type: none"> • Consistently demonstrates the ChenMed behavior expectations (competencies) required to succeed in the role. • Delivers all performance outcomes (metrics, KPIs, goal targets, or job activities) over the course of the year and sometimes exceeds expectations. 	<ul style="list-style-type: none"> • Demonstrates all or beyond the ChenMed behavior expectations (competencies) required to succeed in the role. • Delivers more than 100% of all performance outcomes (metrics, KPIs, goal targets, or job activities) over the course of the year and consistently outperforms others.



ChenMed