Ontario Medical Association

Managing your medical office staff:
An HR guide for physicians

Ontario Medical Assocation (OMA)
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A. Introduction

Building a successful medical practice begins with staffing. Your team is one of your most valuable investments and serves as the foundation for a successful practice.

Effective staff selection and management are key to ensuring your office runs smoothly. The right team can deliver greater returns than any other investment, helping turn your vision into reality. With the right people in place, they can manage the day-to-day operations of your patient-centered clinic, allowing you to focus on what matters most—providing quality patient care.

This guide aims to provide advice on how to determine your staffing needs and optimize their performance. It also includes templates and links to Ontario employment legislation.

For questions or more information, contact the OMA at:

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Disclaimer:
The information contained in this document is intended to be used as a reference guide only. The guide is not intended to provide specific advice as appropriate advice will vary in different circumstances. While every effort has been made to provide accurate and current information, the Ontario Medical Association does not make any representations, warranties, or conditions (either express or implied) with respect to the accuracy or reliability of the information provided.

B. Recruitment and hiring

You may rely heavily on office staff for day-to-day operations; therefore, it is prudent to hire and train the right employees who will help meet the practice's goals.

In general, staffing in a medical office can encompass:

- **Licensed clinicians:** health-care professionals, such as nurse practitioners, registered nurses, physician assistants, allied health professionals.
- **Office manager:** responsible for the administrative/ business side of the clinic.
- **Medical office staff:** responsible for answering the telephone, welcoming patients, patient scheduling, medical report transcription, medical records management, and medical billing.
- **Billing specialist:** responsible for managing the information related to OHIP, WSIB and uninsured billings.

In some settings, staff may perform multiple roles. In fact, cross-training is encouraged to allow proper coverage in case of sick days, holidays, etc. A dynamic team means fluid participation throughout the clinic. Alternatively, specialization allows for undivided attention but can have negative repercussions when unexpected absences happen. The precise definition of roles should be based on each office's needs.

B. Recruitment and hiring

Assessing staffing needs

In a medical office, a combination of factors typically shapes staffing.

- **What is the medical specialty?** The services you offer may require a specific number or type of employees or technicians for adequate support.
- **How many providers do you have?** Whether you have two physicians or 25, medical providers need adequate staffing to support them in delivering quality services. Research other medical offices to get a sense of the typical number of employees per physician and to help ensure that you are not understaffed or overstaffed.
- **What is the patient volume?** The number of patients treated daily, weekly, monthly, and annually can dictate the staffing level required for certain roles, such as nursing or billing. But the demand for services will dictate how many administrative staff you will need to manage busy phones, manage documents, handle 3rd party requests, etc.
- **What kind of productivity do you want to achieve?** The ratio of staffing to services rendered, and the roles you have assigned, will affect your efficiency.
- **What tasks would you like your staff to do?** Consider what tasks need to be done and what skills are required for these tasks. Always hire staff to fill the job you need done.

Staffing needs in a medical office can evolve over time, so it's important to stay adaptable as these changes occur. Your staffing structure will also be influenced by the organizational model you choose (e.g., centralized or decentralized) and how much responsibility you're comfortable delegating. There's no one-size-fits-all solution. When evaluating your staffing needs, the key is to build a team that aligns with your goals for delivering exceptional patient care.

See Appendix A for assessing your staffing needs guidance.

Hiring process

Once you've identified your staffing needs, the following steps can help you choose the right candidate.

> As an employer, you must comply with Ontario's employment legislation.

See Appendix B for a recruiting/hiring process checklist.

See Appendix C for human resources and employment legislation in Ontario.

Creating a job description

A job description is a formal document that should clearly outline the duties and responsibilities associated with the position you are hiring for. It also serves as a key reference for performance appraisals.

For each role, detail all the duties and responsibilities in order of priority, along with the percentage of time required for each task. Be sure to specify all necessary qualifications, such as experience, education, specialized training, and work conditions.

See Appendix D for a job description template.

These qualifications, along with the level of responsibility, will determine the salary that fits the job description. Colleagues, hospital administrators, employment agencies and internet searches can give you some guidance on pay scales and benefits in your area.

Establishing employment conditions

Job candidates are entitled to know about the position being offered, general working conditions, and your expectations for performance. Before you start recruiting, establish the conditions under which employees will be hired.

Be realistic in creating these guidelines. If the conditions do not match expectations, you may lose candidates and be forced to repeat the hiring process.

B. Recruitment and hiring

Recruiting and screening candidates

Consider seeking candidates via:

- Advertising through local medical societies (e.g., community hospitals), employment websites (e.g., indeed.ca, monster.ca), local job boards (e.g., community newspapers).
- The placement office at a community college near you.
- HealthForce Ontario (for healthcare professionals only).
- Word of mouth (ask colleagues for references).
- An employment agency. They usually charge a fee based on the percentage of the newly hired employee's salary (if you hire through an agency, be sure to obtain a time-related guarantee of satisfaction).

The more applicants you have, the greater your chances of finding the right candidate. While not every applicant will meet all your requirements, and you may not find the "perfect" fit, focus on those who best align with your core needs—such as relevant work experience, training, and personal qualities. Add these candidates to your shortlist for a phone interview.

Interviewing

Once you have reviewed and selected the most promising resumes, it's time to schedule interviews. This will allow you to:

- Advertising through local medical societies (e.g., community hospitals), employment websites (e.g., indeed.ca, monster.ca), local job boards (e.g., community newspapers).
- The placement office at a community college near you.
- HealthForce Ontario (for healthcare professionals only).
- Word of mouth (ask colleagues for references).
- Word of mouth (ask colleagues for references).

The types of questions you ask during the interview are crucial. It is important to ask each candidate the same set of questions to ensure an unbiased evaluation and create a scoring matrix for comparison. Focus on the candidate's experience, skills, character, and motivation for applying. Take notes on their strengths and weaknesses to refer to later when making your final decision.

Keep your questions job-related, as government regulations and human rights legislation prohibit inquiries about personal details such as age, sex, marital status, religion, race, and more.

Before concluding the interview, be sure to obtain permission to contact the candidate's references.

See Appendix E for some sample interview questions.

Rating candidates

Evaluate candidates consistently by using an interview rating form. This allows you to quantify the skills and personality traits that are most important for the role, based on the job description. It is best to complete the form right after the interview to ensure the rating remains objective.

If assessment of technical competence is necessary, you can administer a technical test or consult with an expert. For instance, you might have your accountant conduct an interview and provide feedback on a candidate applying for a bookkeeper position.

See Appendix F for a sample interview rating form.

Checking references

Do your homework and always check references for the most suitable candidates. You should request at least two professional references. It is important to speak with the candidate's immediate supervisor.

Ask questions such as:

- In what area did the person work?
- What kinds of interpersonal skills does the person have?
- How was the quality of their work?
- What was their workload and performance like?
- What was the person's attendance like?
- What were their best/worst attributes?
- What salary were they being paid?
- Why did they leave?
- Would you hire them again?

You may not receive answers to every question, but you should be able to compare the responses with the impression you formed during the interview.

Hiring/Making an offer of employment

Once you have chosen the applicant that best meets the position's requirements, you will need to make a formal job offer.

Background checks such as criminal, credit and social media, education and license verification, and references can be done before or after the offer. You may want to make your job offer conditional upon passing the checks, if done after the offer.

Potential hires should be informed ahead of time of any background checks that will occur.

The OMA recommends that physicians sign written contracts with all employees and include a probation period. Contracts must be signed upon employee acceptance of the offer, prior to the first date of employment.

OMA Legal Services can provide sample employment template agreements upon request at legal.affairs@oma.org. When requesting a template, please specify (a) whether you are hiring an allied health professional or a clerical staff member and (b) whether you are hiring the staff personally or through your MPC.

C. Onboarding

Providing your employees with the tools and resources required for their role is a key to setting them up to be successful in their role.

Set up

Employee space and tools

Set up the workspace for your employee and ensure he/she has all the tools to complete their job such as:

- Clean workspace
- Tools for role – e.g., phone, computer, access to work-related software e.g., EMRs
- Employee handbook with HR policies and office procedures
- Schedule for the first week
- Contact information

Payroll, taxes & documents

You will need to set up your employee with:

- Office payroll system
- Employee taxes (open or manage a payroll account with Canada Revenue Agency)
- Enroll in required government employee compensation programs (Employment insurance (EI), Canada Pension Plan (CPP))
- Benefits program, such as employee medical & benefits insurance (if applicable).
- Collect the required documents from your employee. For example, emergency contact information, confidentiality agreement (see Appendix G) and vaccines (if required).

Resource: Employment Regulations of Canada

Share your office culture

Share the company's goals and vision. Discuss the employee's role in achieving these goals. Discuss the company's office culture and policies for a safe, equitable, diverse, and inclusive workplace (e.g., respectful communication, etc.)

Create mentoring/training schedule

Develop a training plan for the first few weeks, which should include a schedule and task list, to help your new employee get up to speed with their role. Assign a colleague or manager to support them during this learning phase.

Set clear expectations aligned with the organization's broader goals but be mindful that it may take several months for the employee to fully develop the skills required for the role.

Mandatory training in Ontario

Every organization's training needs are unique. But, in Ontario, almost all workplaces are required to provide the following training for their employees:

- **Accessibility for Ontarians with Disabilities Act (AODA)**

Employers are required to train their employees on the Accessibility for Ontarians with Disabilities Act (AODA) and on what they are doing to comply with the Integrated Accessibility Standards Regulation (IASR). AODA training educates employees about:

- The purpose of AODA, including details about its standards and the benefits they offer Ontarians.
- How to interact with people with various types of disabilities.

To train your employees on the AODA, you can consider an online training course, such as the free AODA course offered by AODA.ca.

- **Workplace Hazardous Materials Information System (WHMIS)**

The Workplace Hazardous Materials Information System (WHMIS) is a national hazard communication standard. WHMIS training is mandatory for all employees who work with or who may be exposed to hazardous substances or products in the workplace.

Because hazardous substances can range from cleaning products, to paint, to gasoline, almost all employees require WHMIS training.

Several organizations, for a fee, provide additional information and training resources, such as:

- o Canadian Centre for Occupational Health and Safety
- o Public Services Health and Safety Association

C. Onboarding

- **Health and Safety Orientation (Basic Health and Safety Awareness Training)**

Reg. 297/13: Occupational Health and Safety Awareness and Training requires employers to provide basic health and safety awareness training to all employees and supervisors. In addition to basic health and safety training requirements, employers are also required to train all employees on policies and procedures specific to their workplace.

Several organizations, for a fee, provide additional information and training resources, such as:

  - Guide to the Occupational Health and Safety Act
  - Workplace Safety and Prevention Services -OHSA Ontario and employer responsibilities, resources and training courses
  - Public Services Health and Safety Association
  - Canadian Centre for Occupational Health and Safety

- **Respect in the Workplace (Harassment and Violence in the Workplace)**

Under the Occupational Health and Safety Act, employers are required to develop and enforce a workplace violence and harassment policy and train their employees on the contents of the policy. Supervisors must also receive training on how to follow up on incidents and complaints. In addition, employers and supervisors are responsible for preventing and addressing harassment prohibited under Ontario's Human Rights Code.

Several organizations, for a fee, provide additional information and training resources, such as:

  - Ontario Workplace Violence and Harassment
  - Public Services Health and Safety Association

Role/Setting required training

Additional training may be necessary for your employees depending on their specific role and the healthcare setting. Commonly required training includes WSIB, patient communication skills, EMR training, PHIPPA, infection prevention and control, and cybersecurity, among others.

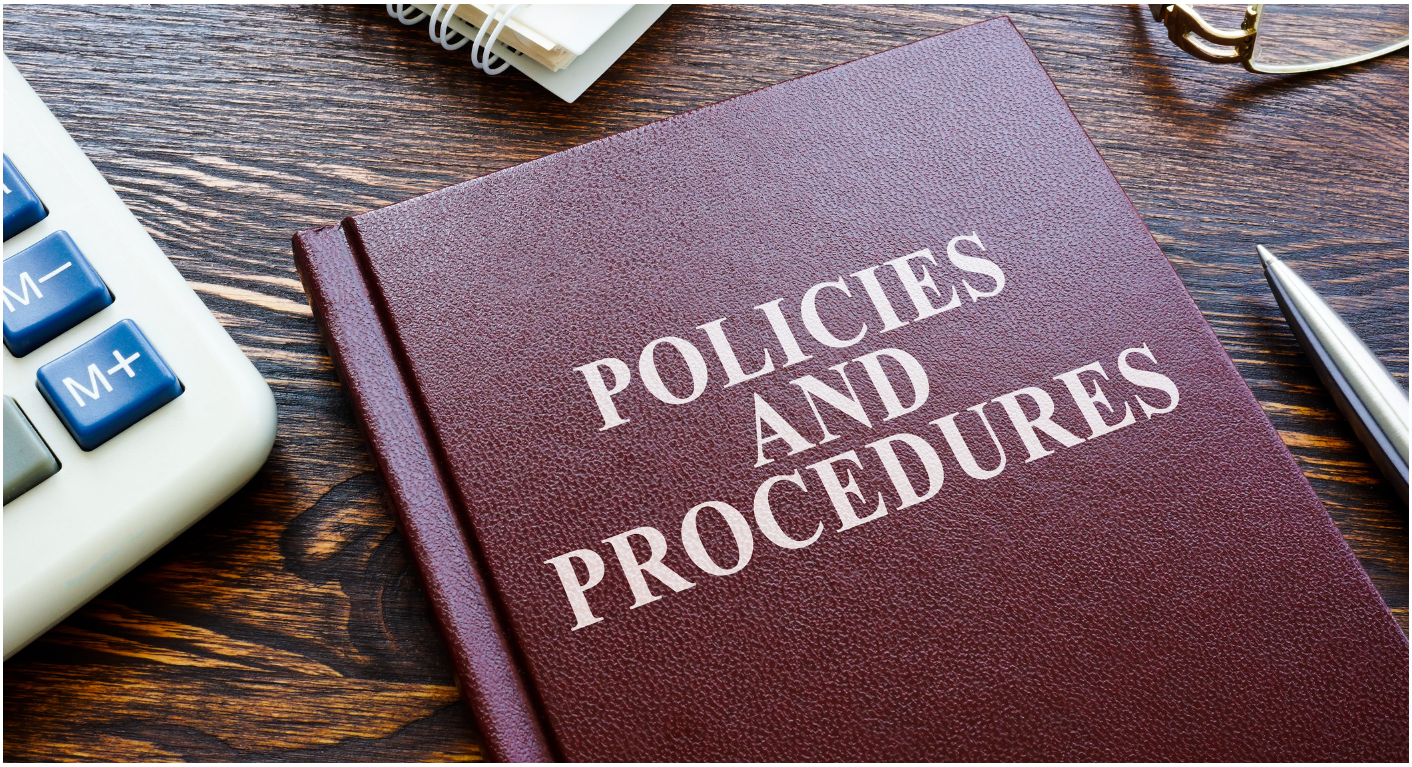
OMA has included links to external websites and resources not controlled or affiliated with it. OMA is not responsible for the content of these sites, and the inclusion of these links does not constitute or imply endorsement of the organizations associated with them. They are shared for information purposes only.

C. Onboarding

Virtual onboarding

Virtual onboarding follows a similar process to in-person onboarding, with the same key steps. The main challenge in a virtual setting is fostering relationships. To ensure effective communication and collaboration, it's essential to introduce strategies that help build connections within the organization. Here are some ways to ensure successful virtual onboarding:

- Set up technology and access prior to the start date.
- Schedule virtual group and one-on-one meetings to introduce the new employee to the team.
- Provide a list of individuals who can assist with specific tasks if needed.
- Discuss preferred communication methods for you and the team.



Procedure manual on business processes and policies

As you define roles and encounter workplace issues, document them to create a comprehensive policy and procedure manual. This manual will serve as a guide for your operations, ensuring consistency and efficiency. It will also aid in training staff and maintaining clear, productive working relationships.

Your policies and procedures should cover a broad range of topics, such as health and safety protocols, probationary periods, work hours, absenteeism, code of conduct, dress code, and how to perform specific tasks (e.g., submitting OHIP claims, recording information in patient files), among others.

See Appendix G for a policy and procedure manual topics.

D. Motivation and retention

A 2019 study by researchers at Oxford University found that happy employees can be up to 13% more productive.

Each employee has unique needs, goals, and priorities. By understanding and addressing these, you can enhance your staff's effectiveness and job satisfaction, encouraging them to reach their full potential.

Motivation and retention are closely linked. Motivated employees tend to be more productive and are less likely to leave, which helps you avoid the costs of recruitment and training, as well as minimizing disruption to clinic operations. Here are some strategies to consider:

Respectful and safe work environment

Staff are more likely to perform at their best (and to stay) when they are working in an environment that supports them. That means providing employees with:

- A well-defined job description with clear goals.
- The tools, time and resources required for their role.
- Continuous feedback - what they are doing well, what could be improved upon and steps to support their improvement.
- Training to perform their job well and the ability to develop new skills.
- Interesting challenges, and appropriate rewards.
- A workplace that is free from discrimination and bullying.
- Two-way and respectful communication.
- A culturally sensitive, respectful, and safe workplace, that values all contributions and recognizes and celebrates different traditions.

Keep communication open

Clearly communicate your practice's objectives and how each staff member plays a role in achieving them. When employees understand their contribution to the practice’s success, they feel a greater sense of accomplishment.

Discuss key decisions ahead of time and hold regular staff meetings to keep everyone informed about developments within the office.

Encourage staff to share their opinions on processes, job satisfaction, morale, and other areas. It is important that employees feel their feedback is valued. Additionally, staff input can provide valuable insights to help improve your practice.

Promote open communication, not only between you and your staff but also among staff members. This fosters a more coordinated, high-performing team with a sense of unity—creating a "we" mentality rather than an individual focus. Remember, communication should be a two-way process.

D. Motivation and retention

Skill Development

Offering ongoing learning opportunities is an effective motivator for your team. It helps reduce turnover and demonstrates your confidence in their abilities. Continuous training can boost employee confidence, prevent stagnation, ensure they stay current with industry trends, and enhance their skills. By developing your staff's capabilities, you improve the overall performance of your clinic and help it achieve its goals.

Potential areas for development for office staff could include EMR software proficiency and communication skills, such as de-escalation techniques.

Visit OMA Learns and OMA's practice management resources for resources on managing challenging patient encounters, cybersecurity, administrative tasks, billing and more.

Changes in role

Expanding an employee's role and building on their strengths is an effective way to demonstrate your confidence in their abilities and an opportunity to delegate some of your administrative tasks to your staff. However, any changes to an employee's role and responsibilities must be discussed, agreed upon and should include appropriate financial compensation.

Provide meaningful rewards

While salary is important, it is not the only factor that motivates employees. Though remuneration, such as pay raises, can be effective, rewards come in many other forms that complement a good salary. Not all employees are motivated by the same things.

Consider a wide range of factors that can both compensate and motivate staff—flexible work conditions, team-building activities, opportunities for advancement, varied job tasks, bonuses, incentives, benefits, training and development, special projects. Taking these into account will help you create a reward structure that employees truly value.

> It is essential that each employee be able to clearly see the connection between their efforts and the rewards they receive.

E. Performance feedback and appraisal

Performance feedback is a valuable opportunity to highlight an employee's strengths, showcase examples of good work, and address areas for improvement. It serves as a valuable tool for enhancing productivity, making employees feel valued, and helping them develop professionally.

What is a performance appraisal?

A performance appraisal is a formal evaluation that assesses how well an employee is meeting the expectations outlined in their job description. It is designed to facilitate constructive discussions about performance.

Formal appraisals help to:

- Evaluate employee performance in terms of skills and behavior.
- Align individual performance with practice goals, standards, and expectations.
- Identify strengths and areas for improvement within the team.
- Create personalized training and development plans.
- Strengthen relationships between employees and management.
- Inform decisions about merit-based pay increases.
- Contribute to overall organizational performance.

The ultimate goal is to provide a documented assessment of an employee's performance, along with a clear plan for their future development.

See Appendix I for a performance appraisal template.

What is the appraisal based on?

Appraisals compare the individual's performance to their job description, and to goals and standards agreed upon at a previous appraisal.

A job description may need to evolve over time to align with the changing needs of the organization. It is essential to discuss and agree on any modifications with the employee, and in some cases, consider seeking legal advice to ensure compliance with legislation. Employers cannot unilaterally change the job description; this is akin to constructive dismissal. When conducting performance reviews, always base evaluations on the most current version of the job description.

All staff in the organization should be assessed by their direct manager. The goal is not perfection but consistent improved performance.

How often should appraisals be held?

Conducting formal appraisals once or twice a year is recommended. Additionally, managers should hold regular check-ins with employees throughout the year to discuss work progress, training and development and career goals. These informal conversations help make formal appraisals less stressful and more productive.

Performance issues

When an employee has performance issues, it can impact not only task completion but also team motivation and the organization's ability to achieve its goals. Addressing performance issues constructively is often more effective and cost-efficient than replacing the employee.

Identify the issue

First, determine whether the problem is one of **poor performance** or **misconduct**:

- **Poor performance** is an inability to meet task requirements.
- **Misconduct** involves negligent or intentional violations of workplace policies.

Addressing poor performance

For performance issues:

1. **Communicate clearly:** Share your concerns factually, providing specific examples of poor performance without being accusatory.
2. **Develop a performance improvement plan:** Collaborate with the employee to create a plan that includes SMART goals (specific, measurable, achievable, relevant, and time-bound objectives). Consider training needs or adjustments to job responsibilities.
3. **Clarify expectations:** Ensure the employee understands the requirements for remaining in the role.
4. **Ongoing review and support:** Meet regularly to assess progress against the improvement plan. Recognize improvements and coach on areas still needing development.

Addressing misconduct

Misconduct requires a different approach, as it involves serious behavioral issues such as fraud, confidentiality breaches, or repeated lateness. Steps for handling misconduct include:

1. **Verbal warning:** Discuss the issue promptly, outlining the impact, necessary changes, and future consequences if the behavior continues.
2. **Written warning:** If misconduct persists, hold a second conversation, document the discussion, and provide the employee with a written warning.
3. **Termination:** If the behavior does not improve, termination may be necessary.

Note: The response to misconduct should match its severity. For serious infractions, such as those that violate core organizational policies, immediate termination may be warranted.

F. Termination

Terminating an employee is never easy but is sometimes necessary. Your obligations and the employees' rights are governed by Ontario's Employment Standards Act and can be complex.

It is prudent to review the ESA and obtain legal advice before terminating an employee and making decisions regarding notice or termination pay.

When can you terminate an employee?

The ESA does not require an employer to give an employee a reason why their employment is being terminated. However, an employer cannot terminate if an employee is asking questions about the ESA or exercising a right under the ESA, such as refusing to work overtime.

The employer should be able to demonstrate "just cause" by documenting non-performance, warnings (verbal to written), training/discipline plan to help the employee improve and employee's comments, in their personnel file.

Who does not require termination notice/pay?

An employee is not entitled to notice of termination or termination pay if:

- The employee is guilty of willful misconduct, disobedience, or willful neglect of duty that is not trivial and has not been condoned by the employer.
- Temporary layoff.
- The employee refuses an offer of reasonable alternative employment.
- The employee has been employed for less than three months.

What is the termination notice & pay requirements?

Generally, the employer must provide a written notice of termination, termination pay or a combination (if the notice and termination pay together equals the length of notice the employee is entitled to).

The notice/pay will be based on whether the employee has a contract limiting notice to the ESA or not, then common law will apply.

For ESA, the period of statutory notice varies depending on the length of employment. An employee earns vacation pay on their termination pay. Employers must also continue to make whatever contributions would be required to maintain the benefits the employee would have been entitled to, had they continued to be employed through the notice period.

Termination pay must be paid to an employee either seven days after the employee's employment is terminated or on the employee's next regular pay date, whichever is later.

For common law, often, this works out to one month of pay for every year worked up to a maximum of two years. In these cases, the courts will look at a variety of factors, including how senior the employee was, how long the employee worked for the employer, how old the employee is, what the employee's chances of future employment are, and whether the employee was induced in any way to accept the position.

F. Termination

What are the employer's requirements during the statutory notice period?

During this period, an employer must:

- Not reduce the employee's wage rate or alter a term or condition of employment.
- Continue to make whatever contributions are required to maintain the employee's benefits plans.
- Pay the employee the wages he or she is entitled to, which cannot be less than the employee's regular wages for a regular work week.

G. Conclusion

Maintaining strong human resource practices is essential for fostering a happy workforce. Satisfied employees tend to be more productive, engaged, creative, and reliable, with lower absenteeism and turnover rates. A positive work environment not only boosts employee morale but also plays a crucial role in helping the organization achieve its goals and objectives.

Appendix

Appendix A: Assessing staffing needs

Consider the following when assessing your staffing needs. These are important to review at the start of establishing a practice and when there will be changes to the size and type of practice.

Internal

- Will there be a change in the number of physicians or number of hours the physicians are working in the office?
- Are any of the physicians planning to change their activities in the office in a way that may impact the staffing needs (e.g., introduction of new in-office procedures, shifting the profile of the practice, etc.)?
- Is the volume of patients seen by one or more of the physicians expected to change significantly in the future?
- Are there tasks or processes that you could delegate to an employee?
- Are there problems in your office policies that are hindering the proper function of your office (e.g., sick leave, internal communications, etc.)?
- Are things falling between the cracks because tasks or responsibilities are not properly assigned?
- Do you expect the permanent or temporary departure of one or more of your employees?
- Are there deficiencies in the actual layout or the amount of floor space that is hindering employees from completing their work?
- Do the employees have the tools (e.g. software, knowledge) to perform their duties?

External

- Have there been changes in the labour laws or rules that may impact the way you manage your employees?
- Are there expected shifts in revenue or expenses that might influence the budget for your team?
- Will new technology be introduced that requires your staff to learn and adapt?
- Is your community or region undergoing changes, such as shifts in unemployment, economic conditions, or increased competition for talent, which could affect your ability to find skilled employees?

Appendix B: Recruiting/hiring process checklist

This list is not an exhaustive guide to recruiting and hiring staff, but it provides a starting point for identifying and tracking essential tasks in the process.

Pre-interview process	Completed
Identify your staffing needs	☐
Create new job description (update current job description if one exists)	☐
Develop qualifications, characteristics, experience, and criteria needed for the position	☐
Determine salary range and compensation for the position	☐
Post the job – e.g., internal postings, online, newspaper, employment agencies	☐

Interview process	Completed
Screen resumes against qualifications and criteria established	☐
Create a short list of qualified candidates	☐
Develop standardized interview questions and rating scale	☐
Meet with all interviewers to determine the process for the interviews	☐
Conduct phone interviews with short list candidates	☐
Schedule interviews for qualified internal candidates (if any)	☐
Schedule interviews for qualified external candidates	☐
Conduct interviews	☐
Give candidates a copy of the job description during the interview	☐
Use a rating scale form to determine top candidates	☐
Discuss with interviewers which (if any) candidates will have a second interview	☐
Schedule second interviews (only if necessary)	☐
Reach consensus on the best candidate	☐
Check references	☐
Conduct background checks (if applicable)	☐

H. Appendix

Post-interview process	Completed
Make an offer to the selected candidate and send a letter confirming offer*	☐
Confirm written acceptance with selected candidate	☐
Notify interviewed candidates not selected via phone, email, or letter	☐
Ensure all necessary documents are in place for start date (e.g., emergency contact, vaccines, payroll)	☐

Onboarding	Completed
Notify current staff of new hire start date and role	☐
Prepare an onboarding package, which should include the policy and procedure manual and touchpoint person for questions during their onboarding	☐
Set up physical workspace, with required tools (computer, phone) and work-related access	☐
Develop a schedule for the first week, including having someone greet the employee on the first day and introduce the team and the space	☐
Set up employee with payroll, taxes and required programs	☐
Set up mandatory training sessions and role specific training	☐
Set up touch base with employee's supervisor at the end of first day, first week, first month	☐

**The Offer package should include, but not be limited to, a letter outlining the start date, expected salary, reporting relationship, supervising relationship, job description, work hours, confidentiality agreement, and any other benefits or commitments that were negotiated with the candidate.*

Appendix C: Human resources and employment legislations links in Ontario

- The Ontario Employment Standards Act, which sets minimum standards for conditions of employment in most workplaces in Ontario:
  http://www.labour.gov.on.ca/english/es/
- Government of Canada: Employment regulations including CPP, EI, WSIB and personal income tax:
  https://sbs-spe.feddevontario.canada.ca/en/employment-regulations-hiring
- The Ontario Human Rights Code, whose goal is to prevent discrimination and harassment and provide equal rights and opportunities in specific areas such as jobs, housing, and services:
  https://www.ohrc.on.ca/en/your_rights/social_areas/employment
- The Ontario Occupational Health and Safety Act, which protects workers' health and safety on the job:
  http://www.labour.gov.on.ca/english/hs/.
- It includes protection from workplace violence and harassment:
  http://www.labour.gov.on.ca/english/hs/topics/workplaceviolence.php
- The Pay Equity Act, which protects the principle of equal pay for work of equal value:
  https://payequity.gov.on.ca
- The Workers' Compensation Act, which provides compensation and other benefits to workers and to their survivors and dependents:
  http://www.e-laws.gov.on.ca/html/repealedstatutes/english/elaws_rep_ statutes_90w11_e.htm
- Accessibility for Ontarians with Disabilities Act, which strives to make Ontario accessible to all:
  http:// www.e-laws.gov.on.ca/html/statutes/english/elaws_statutes_05a11_e.htm
- Employment Insurance information for employers:
  http://laws-lois.justice.gc.ca/eng/acts/e-5.6/
- Information and Privacy Commissioner of Ontario, which upholds and promotes open government and the protection of personal privacy in Ontario:
  http://www.ipc.on.ca
- Government of Ontario guide on electronic monitoring of employees:
  https://www.ontario.ca/document/your-guide-employment-standards-act-0/written-policy-electronic-monitoring-employees

Appendix D: Job description template

Job title:	The formal title of the position
Reports to:	The title of the position that the job incumbent reports to
Grade:	The salary grade that the position falls within (if you use a grading system)

Job summary

Provide a summary (1-2 sentences) of the scope, objective or role, and key responsibilities of the position. Give an overview of the job's main purpose. Highlight the type of employment (e.g., full-time, contract, shift)

(e.g., Full-time medical office receptionist to support a medical health office)

Responsibilities and duties

- List 3-5 major responsibilities and duties in descending order of importance. Importance is related to those responsibilities that most contribute to carrying out the purpose of the job.
- Begin each statement with an action verb and use the present tense of the verbs, e.g., "Greet patients to the office in a professional and friendly manner" or "Reconcile accounts payables/receivables and produce financial statements on a regular and timely basis".

Qualifications – education and/or work experience

State the knowledge and skill requirements for the job. These are the abilities required to perform the daily tasks and job duties listed above. List what is required for the job NOT what the incumbent possesses.

- List minimum education/credential needed to be able to perform the job at a normal level of performance.). Be as specific as possible about names of certificates, degrees, and specific job-related training programs, e.g., "Undergraduate degree in Health Care Administration".
- List skills and knowledge requirements that are experienced based, e.g., "Experience in EMR software" or "Excellent verbal and written communication skills, including ability to effectively communicate with internal and external clients".
- List minimum experience needed to be able to perform this job at a normal level of performance. e.g., "five years' experience required in the health care field, including demonstrated knowledge of OHIP billing".

Ensure the qualifications required are the necessary ones for the role and align with compensation.

All qualifications must comply with provincial human rights legislation.

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Working conditions

Identify the working conditions of the role, such as:

- Contract or Permanent
- Full Time or Part-time including hours (e.g., 9 a.m.- 5 p.m.)
- In-person (location)/work from home
- Include special considerations for the position, such as working with exposure to hazards, occasional travel, necessary overtime, shift work or evening work, e.g., “Work involves evenings and some weekends”.

Direct reports

Direct supervisory responsibility includes the authority to hire, transfer, suspend, promote, terminate, assign, reward or discipline subordinate employees or effectively recommend such actions. List by job title any positions to be supervised by the incumbent.

How to apply

Explain how to apply for the role (e.g., email) in a specific format (if desired).

Internal review:

Approved by:	Signature of the person with the authority to approve the job description
Date approved:	Date when the job description was approved
Reviewed:	Date when the job description was last reviewed

A job description should be reviewed annually and updated as often as necessary to ensure that it stays current and relevant.

Appendix E: Interview questions template

Below are some common interview questions.

Choose questions that help you gauge the skills, experience and characteristics needed for the role. Typically, prepare about 7 to 10 questions.

- Walk me through your resume / Can you tell me about your professional background?
- What interests you about this role?
- What would you consider to be a great workplace?
- What do you like the most and the least about your current job?
- Describe your work style?
- What are your strengths? What are your weaknesses? (Ask for examples.)
- If I called your supervisor, what would he/she say about you?
- How do you handle pressure at work?
- Tell me about a challenge or conflict you've faced at work, and how did you handle it.
- How do you define teamwork? Tell me about a time that you demonstrated teamwork.
- Tell me about a time, you demonstrated … (name skills most needed for the role)
- Tell me how you manage conflicting priorities. When you are balancing multiple projects, how do you keep yourself organized?
- How do you deal with stressful situations? Tell me how you overcame a stressful situation.
- What would you do if you believed your co-worker is doing something wrong?
- What is your greatest professional achievement?
- What is your salary expectation?
- Can you commit to occasionally working overtime? (Ask this if the office hours may require the employee to work overtime or irregular hours.)
- Do you have any questions that you would like to ask me? (Always provide an opportunity for a candidate to ask a few questions.)

Appendix F: Interview rating scale form template

An interview rating scale is a fair way to rate and compare candidates to determine the best fit for your team.Ensure the areas of competence are based on the job description and is specific for rating accurately.

Candidate: ____

Position: ____

Date of interview: ____

Interviewer(s): ____

Rating scale:

5 – Outstanding | 4 – Above average | 3 – Average/ standard experience |

2 – Below average/limited experience | 1 – Poor/no experience | 0 – Not applicable

Area of competence List the top skills/experience required for the role.	Rating	Notes
Technical skills required for the role Experience, education related to role		
Communication Skills required for the role Interpersonal skills, written communication, verbal skills		
Analytical/critical skills required for the role Problem solving, ability to prioritize, work autonomously etc.		
Financial experience related to role OHIP billing, uninsured services, paying and tracking invoices etc.		
Additional Comments		

Total Score: ____________________

Appendix G: Policy and procedure manual topics

The contents of an employee policy and procedure manual will depend on your type of practice. The list of topics can include (but not be limited to) the following.

All policies and procedures must abide by provincial laws.

Medical practice's mission, vision, and values

The mission statement focuses on what the organization does now, who they serve and how they serve them.

The vision statement focuses on the future and what the organization wants to become. It drives the companies' goals and objectives.

Values are what the organization's belief system and should align with the goals of the organization.

Organizational structure

The organizational structure describes what employees do, whom they report to, and how decisions are made.

Policies topics:

- Code of conduct - See Appendix H below
- Workplace violence & harassment policy - See OMA Template
- Confidentiality and privacy policy - CMPA Confidentiality Agreement Template
- Health and safety policy - Workplace Safety and Prevention Services Template or Ministry of Ontario Template,
- Accommodation policy (AODA) - HR Inclusive Toolkit (contains sample wording on page 11)
- Conflict of interest
- Hiring guidelines
- Job descriptions (list of job titles, roles and responsibilities)
- Reporting structure guidelines
- Salary grades and scale, compensation (benefits, life insurance, etc.)
- Performance review process
- Termination guidelines
- Hours of work (including guidelines on breaks, holidays)
- Overtime
- Leaves: vacation time, sick leave, bereavement, etc.
- Working from home
- Dress code
- Use of equipment for personal use
- Social media

H. Appendix

Office procedures

Procedure manuals should include the steps to complete a task, the role responsible for completing a task, and frequency of tasks.

Office Management

- Health and safety procedures - Template by: Workplace Safety and Prevention Services
- Emergency procedures - (Emergency telephone numbers, basic staff preparedness, emergency in office (with and without a physician etc.)) – Templates by: Ottawa Public Health or IHSA
- Office inventory procedures and maintenance procedures
- Payroll Procedures.

Patient management

- Patient communication - e.g., telephone, email and in person procedures (preferred greetings, how to call the patient (last name or first name), eye contact, etc.)
- Patient scheduling - e.g., appointment booking, cancellation procedures. See OMA online appointment webinar
- Patient traffic flow procedures - See OMA patient flow tips
- Patient privacy and confidentiality - e.g., Leaving messages for patients, keeping information secure.
- Medical records - e.g., filing, confidentiality.
- Safe office procedures (aggressive behaviour/deescalating) - See OMA patient expectation webinar/resources.
- Procedure for communicating with other healthcare providers, such as specialists/FD, laboratory/diagnostic testing, allied health etc.- e.g., Following up with missing results, notifying patients about appointments.

Office Management

- How to submit claims to OHIP and WSIB
- Track updates to OHIP billing
- How to reconcile remittance advice (RA) and error reports
- How to bill and collect payment of non-insured services
- Accounting procedures

OMA has included links to external websites and resources not controlled or affiliated with it. OMA is not responsible for the content of these sites, and the inclusion of these links does not constitute or imply endorsement of the organizations associated with them. They are shared for information purposes only.

Appendix H: Code of conduct template

A Code of conduct is a business performance tool that sets out the rules and standards for staff. Each medical office should create a code that meets their specific requirements for their employees' behaviours. There are no guidelines for developing a code of conduct specifically for a medical setting.

This is an example only and would not be applicable to all medical offices.

Code of conduct
(Practice name).

Purpose:

To provide standards for employee conduct that promote quality patient care and reflect the expectations of the public for medical practice employees who provide care to patients.

Policy:

All practice employees are expected to conduct themselves both on and off the job in accordance with the definitions and standards set forth in this policy. An employee who violates the expectations for conduct set forth in this policy will be subject to disciplinary action, which may include dismissal. Not every situation that may arise can be anticipated and included in policy. Employees are expected to understand the fundamental expectations governing conduct and apply them to situations that may arise.

Definitions:

Guiding principles: The practice has established the following guiding principles as a fundamental basis to guide business and employee behaviour:

- Keep people safe
- Treat people with respect, trust, and dignity
- Consider all patient needs with sensitivity
- Support informed choice and decision making
- Advance the mission of the practice through teamwork
- Ensure public trust through personal and professional integrity

On-the-job conduct: The employee's response to any assigned duty, responsibility, expectation, obligation or behaviour required of the employee by the employer or the position.

Off-the-job conduct: The employee's off-duty behaviour, which maintains expected ethical and conduct standards and does not discredit or adversely impact the practice's image or public trust.

Public trust: The holding of health-care employment is a public trust, created by the confidence that the patients have in health-care employees. That trust requires adherence to integrity, responsible performance, and correctness in conduct both on and off the job.

Responsibilities:

Employees are responsible for their conduct and behaviour both on and off the job.

Supervisors are responsible for ensuring employees understand the expectations for conduct outlined in this policy and appropriate follow-up action is taken if expectations for conduct are breached.

Procedure:

The following is a partial list of guidelines for conduct. It is not intended to be exhaustive or to anticipate any situation that may arise. Employees are expected to rely on their training and knowledge of practice policy, and when possible, should consult with their supervisor or co-workers to address questions about whether a behaviour is acceptable.

Expectations for employee conduct

- Be cooperative with others. Demonstrate good teamwork principles. Recognize that our practice is only successful if we are successful as a team.
- Demonstrate initiative. See things that need to be done, do not wait until you are told to do something.
- Use practice guiding principles as a basis for decision-making.
- Always be respectful of patients and their families. Respond to patients in a caring, empathetic manner no matter their behaviour. Display a welcoming and hopeful attitude towards those we serve. Remember, patients are our customers, and while they may present challenges, they are never a burden.
- Always adhere to principles of patient confidentiality. Only share patient information with those who have a "legal right to know." Never discuss patients in public places at work or away from work.
- Uphold and reinforce the rights of patients.
- Maintain self-control and utilize appropriate conflict resolution strategies when confronted by people who are angry.
- Refrain from sharing significant personal information about yourself, your family, or your co-workers with patients.
- Maintain therapeutic boundaries with patients and former patients. Do not engage in any type of socialization or relationship that may be outside of the professional role of care provider. If in doubt, seek advice from supervisors or treatment team members.
- Inform supervisory personnel of any patient with whom you have had a relationship with outside the practice. Request a modification in your assignment if a personal relationship with a patient may compromise your ability to provide quality, objective care.
- Provide care for patients using the techniques and procedures taught in orientation and in-service education programs.
- Report to work on time and as scheduled. Only leave your work area when properly relieved and with your supervisor's approval.
- Promptly report safety hazards and take prompt action to prevent injury to others until the problem can be corrected.
- Follow the practice's policy on tobacco and cannabis use and encourage others to do so as well.
- Use telephones, radios, computers, and copier equipment in accordance with practice policy. Keep personal use of telephones to a minimum and do not let it interfere with practice business. Essential personal long-distance calls must be collect, charged to a personal third-party number, charged to a personal credit card, or made using a calling card. Internet use must adhere to practice policy.
- Always use proper telephone etiquette whenever answering the telephone or when calling others. Identify yourself and your work area, be courteous, offer assistance, write down messages and repeat names and numbers back to the caller to check for accuracy.

H. Appendix

Unacceptable conduct:

- Neglect or failure to properly carry out duties, responsibilities, or assignments.
- Insubordination or refusal to follow verbal or written instructions of a supervisor.
- Failure to perform essential job functions.
- Failure to abide by the practice's dress code or maintain personal hygiene in a manner acceptable to the practice environment.
- Failure to appropriately respond in an emergency.
- Unauthorized duplication or inappropriate use of keys. Loaning or providing keys to others without authorization.
- Failure to follow safe work procedures.
- Failure to dispose of bio-hazardous or infectious waste in designated containers.
- Failure to report defective equipment or unsafe conditions.
- Conducting business on behalf of the practice without the permission of senior management.
- Use of profane or vulgar language (as commonly considered) in a manner that others find offensive.
- Willful, intended or threatened harm to patients, family members, co-workers, or others.
- Behaviour intended to harass or threaten patients or co-workers.
- Theft, willful damage, misappropriation or neglect of patient property or property of the practice.
- Reporting to work under the influence of illegal substance. Using, selling, possession of illegal substances during work hours or on the practice's property.
- Any conduct such as use of alcohol, or use or sale of drugs, either on or off the job that adversely impacts the employer's operation (including absence from work) or brings discredit upon the employer's mission or public trust.
- Sleeping on the job.
- Abuse, mistreatment, or neglect of any patient.
- Falsification of practice records (e.g., time sheets, patient records, travel expenses, omission of pertinent data, giving false testimony, etc.).
- Failure to report or disclose information concerning allegations of possible patient abuse, neglect, or other wrongdoing.
- Improper disclosure of confidential information.
- Willful violation of law, contract, policy, or directives. Failure to carry out assignments or responsibilities.
- Improper or illegal use of the practice's telephone, radio, or computer network system. Improper use of the practice's copy machines.
- Unauthorized use of work time, equipment, or facilities for private business or personal use.
- Developing a relationship with a patient that violates expected patient-staff boundaries and therapeutic principles. Failing to report a personal relationship with a patient or former patient outside of the work setting.
- Performing special favours for patients that are outside the medical treatment process, without authorization from the patient's treatment team.

- Failure to treat patients, visitors, co-workers, and the public in a courteous, productive, respectful, and otherwise acceptable manner.
- Off-the-job conduct may discredit the practice's image and public trust.

Discipline

Discipline and corrective action procedures for violations of the employee conduct policy will be handled in accordance with practice policies and procedures. Discipline will be commensurate with the severity of the violation, particularly the impact upon patients. Serious infractions, whether occurring on-the-job or off the job may result in dismissal from employment.

Appendix I: Performance appraisal template

Medical practice name & logo

Employee:	
Job Title:	
Review Date:	

Performance ratings:

(5) Outstanding – performance consistently exceeds expectations.
(4) Above expectations – performance frequently exceeds expectations.
(3) Meets expectations – performance meets expectations.
(2) Below expectations – performance occasionally fails to meet expectations.
(1) Needs improvement – performance is unsatisfactory and fails to meet expectations.

Job responsibilities:

Summarize the key responsibilities and duties that the employee performs as established in the job description (list 3-5 in order of importance).

Job responsibilities	Comments on performance	Performance rating

Goals for the next performance review period:

If the employee rates Below Expectations or below, use this to develop a plan for improvement. If the employee rated Meets Expectations or above, use this to continue to develop your employee skills. Set SMART goals.

Job responsibilities	Comments on performance	Performance rating

Overall assessment

Summarizes the employee's overall performance.

Employee's overall comments
Supervisor's overall comments

☐ I agree with the appraisal as written (no response required).

☐ I do not agree with the appraisal as written (response provided).

Employee signature:______________________________ Date: _______________________________

Supervisor's signature: ______________________________ Date: _______________________________

Appendix J: Additional resources

- Government of Ontario: Employer resources
- College of Physicians and Surgeons of Ontario: Delegation of Controlled Acts policy
- Indeed: Employer resources
- Monster: Employer resources
- Business Development Back of Canada (BDC): Employee management resources
- Indeed: Guide to Interview Scoring Sheets (With Template and Sample)
- Inspired to hire: Interview rating scale example

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