

Caregiver Onboarding Checklist for Home Care Agencies

A structured onboarding program to set your new caregivers up for success and reduce early turnover

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Introduction: Why Onboarding Determines Retention

Research consistently shows that 40 to 60 percent of caregiver turnover happens within the first 90 days of employment. The primary reasons are not pay or working conditions — they are feeling unprepared, unsupported, and disconnected from the agency they joined. A structured onboarding program is the single most effective tool for reducing this early turnover.

Caregivers who receive a thorough orientation, shadow experienced staff, and have regular check-ins during their first month are far more likely to stay long-term. Effective onboarding also reduces liability — caregivers who are properly trained on infection control, client rights, and abuse reporting are less likely to make errors that lead to complaints or survey deficiencies.

This checklist provides a structured framework covering four phases: pre-hire preparation, Day 1 orientation, Week 1 training, and the critical 30-day check-in. Use it for every new caregiver to ensure consistency and completeness in your onboarding process.

Key Insight

Agencies that implement a structured 90-day onboarding program report 25 to 40 percent lower turnover rates compared to agencies that rely on informal "learn as you go" approaches. The investment in onboarding pays for itself within the first quarter through reduced recruitment and retraining costs.

Pre-Hire Checklist

Complete every item on this list before the caregiver's first day of work. Do not allow any employee to begin providing care until all pre-hire requirements are satisfied. This protects your agency, your clients, and the caregiver.

- Background check completed and cleared (state and federal criminal, sex offender registry, OIG exclusion list)

- Reference checks completed — minimum 2 professional references contacted and documented

- Valid driver's license verified and copy on file (if driving is required for the position)

- Proof of auto insurance on file (if caregiver will use personal vehicle for client transportation)

- TB test or chest X-ray results on file and current (within the past 12 months)

- CPR and First Aid certification on file, or training scheduled within 30 days of hire

- Signed job description on file — caregiver acknowledges scope of duties and limitations

- Signed employee handbook acknowledgment on file

- W-4, I-9, and all required tax and employment eligibility forms completed

- Direct deposit enrollment form completed, or alternative pay method documented

Compliance Note

Most states require background checks to be completed and cleared before any patient contact. Allowing a caregiver to work while a background check is "pending" is a common survey deficiency and a significant liability risk. Build a 5 to 10 day buffer into your hiring timeline for background check processing.

Day 1 Onboarding Checklist

The first day sets the tone for the entire employment relationship. A well-organized Day 1 tells the caregiver that your agency is professional, prepared, and invested in their success. A disorganized first day signals the opposite.

- Welcome packet provided — includes company overview, mission statement, organizational chart, and key contact numbers

- Office tour completed — introduce the caregiver to all office staff, show them where supplies are stored, and explain the sign-in process

- Review of employee handbook and key policies — pay schedule, call-off procedures, dress code, cell phone policy

- Review of client rights and responsibilities — caregiver must understand what clients are entitled to and their role in protecting those rights

- Infection control and hand hygiene training completed — proper handwashing technique, use of gloves, when to use PPE

- HIPAA and confidentiality training completed — what information is protected, consequences of violations, social media policy

- Abuse, neglect, and exploitation recognition and mandatory reporting training completed

- Emergency procedures and safety training — what to do if a client falls, has a medical emergency, or the caregiver feels unsafe

- Timekeeping and scheduling system training — how to clock in and out, how to view their schedule, how to request time off

- Uniform and ID badge issued — review dress code expectations and professional appearance standards

Week 1 Checklist

The first week is when caregivers transition from learning in a classroom setting to applying their skills in real client homes. Provide ample support during this transition — a caregiver who feels abandoned during their first solo visits is likely to quit.

- Shadow an experienced caregiver for at least 2 full shifts — observe client interactions, documentation, and time management

- Complete all required state-mandated training hours (verify your state's minimum — typically 8 to 40 hours depending on the state)

- Review and practice personal care skills — bathing, grooming, dressing, toileting, and incontinence care

- Review and practice mobility assistance and transfer techniques — gait belt use, wheelchair transfers, bed mobility

- Review meal preparation and nutrition basics — dietary restrictions, food safety, hydration monitoring

- Review medication reminder procedures and limitations — caregivers may remind but not administer medications in most states

- Practice documentation and visit note completion — review what must be documented for every visit and common documentation errors

- Complete first solo client visit with a supervisor follow-up phone call within 2 hours of visit completion

- Supervisor conducts in-home observation during at least one client visit — provide constructive feedback

- End-of-week check-in meeting with supervisor — review how the week went, answer questions, address any concerns

Best Practice

During the first week, assign the new caregiver to your most experienced and patient clients. Avoid scheduling them with clients who have complex needs, behavioral challenges, or a history of complaints. Build confidence before increasing complexity.

30-Day Check-In Checklist

The 30-day mark is a critical milestone. By this point, the caregiver has enough experience to provide meaningful feedback about their onboarding experience, and you have enough data to evaluate their performance. This check-in should be a formal, scheduled meeting — not a casual hallway conversation.

- Formal 30-day meeting with supervisor completed — use a structured agenda, not an informal chat

- Review all client feedback received during the first month — share positive comments and address any concerns

- Ask the caregiver about their experience — what is going well, what challenges have they faced, what support do they need

- Verify all training documentation is complete and on file — no gaps in required training hours or certifications

- Competency evaluation completed for all required skill areas — use a standardized skills checklist with pass/fail criteria

- Schedule adjusted based on caregiver preferences where possible — accommodating schedule preferences is a top retention factor

- Review timekeeping accuracy and compliance — ensure the caregiver is clocking in and out correctly and on time

- Discuss career development opportunities — CNA certification, specialty training, shift supervisor path

- Provide specific, positive feedback and recognition for good performance during the first 30 days

- Set 60-day and 90-day goals together — create a roadmap for continued growth and engagement

Retention Tip

If a caregiver raises concerns during the 30-day check-in, act on them within 48 hours. Nothing destroys trust faster than asking for feedback and then ignoring it. Even if you cannot fully resolve the issue, communicate what steps you are taking and provide a timeline.

Required Training Log Template

Maintain this log for every caregiver. Keep the completed log in the employee's personnel file. Surveyors will review training documentation during your state survey — incomplete training logs are among the most common deficiency citations.

TRAINING TOPIC	DATE COMPLETED	TRAINER NAME	CAREGIVER SIGNATURE
Orientation and Company Overview	-----	-----	-----
Client Rights and Responsibilities	-----	-----	-----
Infection Control and Hand Hygiene	-----	-----	-----
HIPAA and Confidentiality	-----	-----	-----
Abuse, Neglect, and Exploitation Reporting	-----	-----	-----
Emergency Procedures and Safety	-----	-----	-----
Personal Care Skills (Bathing, Grooming, Dressing)	-----	-----	-----
Medication Reminders and Limitations	-----	-----	-----
Documentation and Visit Notes	-----	-----	-----
Body Mechanics and Transfer Techniques	-----	-----	-----
Bloodborne Pathogens and Exposure Control	-----	-----	-----
Fire Safety and Evacuation Procedures	-----	-----	-----

Background Check Tracking Template

Use this template to track the status of background checks for all new hires. No employee should begin client care until the "Cleared to Work" column shows "Yes." Keep this log updated and accessible for state survey review.

EMPLOYEE NAME	DATE REQUESTED	TYPE OF CHECK	DATE COMPLETED	RESULT	CLEARED TO WORK

90-Day Retention Roadmap

Beyond the 30-day check-in, continue supporting your new caregiver through the full 90-day window. This is the period when most turnover occurs — caregivers who make it past 90 days are significantly more likely to stay for a year or more.

Day 45: Informal Touch Base

A quick phone call or brief in-person conversation. Ask how things are going, if their schedule is working, and if they need anything. This does not need to be formal — the goal is to show you are paying attention and that they are not forgotten.

Day 60: Supervisor Observation Visit

Conduct a second in-home observation visit. Provide feedback on their growth since Week 1. Use this as an opportunity to evaluate whether they are ready for more complex clients or additional hours.

Day 90: Formal Review

Conduct a formal 90-day performance review. Review client feedback, attendance record, and training completion. Discuss compensation (consider a 90-day raise if performance is strong). Set goals for the next 6 months. This is also a good time to ask the caregiver to refer friends or former colleagues to your agency.

The Referral Moment

The 90-day review is the ideal time to ask for employee referrals. A caregiver who has had a positive 90-day experience is your best recruiter. Consider offering a referral bonus (\$100 to \$300) for any referred candidate who completes their own 90-day period.