

# Laboratory Onboarding

## Template





## Disclaimer

The content in this laboratory onboarding template is intended for informational purposes only. The inclusion of particular resources does not imply endorsement or recommendation by the Department of Health and Human Services (HHS) and the Centers for Disease Control and Prevention (CDC).

CDC is not responsible for any errors or omissions that may occur by individuals using this template. Each laboratory must comply with applicable federal, state, territorial, and local requirements; and ensure its onboarding manual contains the correct information specific to its laboratory's processes and procedures. It is up to each laboratory to determine how often this document should be updated; best practices should be on a predetermined regular basis, such as annually.



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## How to Use this Template

Creating a standard, comprehensive onboarding document for your laboratory can help save time for both new hires and existing staff. A structured, comprehensive list of site-specific information and links to SOPs and training resources can help answer common questions and reinforce main messages from site-specific onboarding activities. You can customize this basic template to fit your laboratory by adjusting the order of sections and adding or deleting sections as appropriate. It contains section headers for basic onboarding information including emergency and safety contacts, a section for you to add training resources to your laboratory requirements, and links to supplemental training resources and job aids. By including this template with your onboarding package, new hires will have a central resource to access vital laboratory-related information and to address frequently asked questions. In addition, your customized template will save time and ensure consistency as you onboard new staff.

### Section 1: Introduction

Add text here to introduce your laboratory, describe the document's purpose, etc.

### Section 2: Understanding the Laboratory Environment

#### Laboratory Description

Describe your laboratory, such as the laboratory name, hours of operation, and founding year.

#### Our Mission

If applicable, include the mission of your laboratory, facility, or institution.

#### Our Vision

If applicable, include the vision for your laboratory, facility, or institution.



### Organizational Chart

One simple way to create your laboratory's organizational chart is to make a slide using presentation software. Export the slide as an image with a .jpg file extension, then paste the image into this document.

### Code of Conduct

If applicable, you could include the code of conduct for your laboratory.

### Laboratory Dress Code

Specify applicable requirements and include any recommendations for appropriate laboratory clothing.

### Security

Include information on your laboratory's security requirements or protocols.

### Laboratory Ethics Policy

If applicable, you could include the ethics policy specific to your laboratory.



## Section 3: Position Details

List specific position titles, roles, responsibilities, and other pertinent information such as biosafety level experience.

### Position Title

List the position title corresponding to the role the employee was hired to fill.

### Position Description

Briefly describe skills and attributes that are key to success in this position and why the role is important to the organization.

### Duties and Responsibilities

Describe the job-specific duties, responsibilities, and competencies based on your laboratory's requirements for this position.



## Section 4: Training Resources

### Training Courses

Include training courses and resources appropriate for your laboratory such as any compliance training, courses needed for specific certifications, or other site-specific training. If some training courses are required and others are optional, consider adding subheadings to distinguish between categories. In addition to site-specific training resources, consider linking relevant online training courses created by other laboratories, laboratory professional organizations, partners, etc. To access a list of free eLearning courses created by CDC's Division of Laboratory Systems (DLS), visit [www.cdc.gov/labtraining](http://www.cdc.gov/labtraining). A schedule of upcoming free OneLab live webinars and links to slides from previous webinars is available at [www.cdc.gov/onelab](http://www.cdc.gov/onelab).

### Job Aids

Job aids are short-form resources that support job performance, including checklists, videos, memory aids, and illustrated instructions that provide clear, concise information about a testing protocol, reporting procedure, or other recurring job duty. Include your laboratory's specific job aids as well as any relevant resources created by other laboratories, laboratory professional organizations, partners, etc. To access free job aids created by DLS, including many printable resources that can be customized to fit your site's specific needs, visit [www.cdc.gov/labtraining/jobaids.html](http://www.cdc.gov/labtraining/jobaids.html).

## Section 5: Standard Operating Procedures (SOPs) and Other Documents

Include your laboratory's standard operating procedures (SOPs). Please review your laboratory's biosafety manual and chemical hygiene plan to identify possible SOPs to include here. These may include but are not limited to:

- Receiving clinical samples and documentation
- Preserving samples and isolates
- Safety precautions when handling biological samples
- Test analysis
- Disposing of biological waste products
- Chemical hygiene plan
- Biosafety manual

## Section 6: Contact Information

You can include titles, names, and phone numbers for all essential facility contacts such as Chief Operation Officer, Director, Facility Safety, Security, etc.





## Section 7: Document Revision History

Below is an example of a document revision table that you can customize to fit your laboratory's needs. See Section 8 for an example signature approval page.

Revision Number	Change Summary	Author Name and Title	Approved Date	Effective Date

## Section 8: Document Review and Approval

Add and delete the signature fields below to fit your laboratory's needs.

### Approval Signatures

Document Author: \_\_\_\_\_  
 Print Name and Title  
 \_\_\_\_\_  
 Signature  
 \_\_\_\_\_  
 Date

Department Supervisor: \_\_\_\_\_  
 Print Name and Title  
 \_\_\_\_\_  
 Signature  
 \_\_\_\_\_  
 Date

Quality Reviewer: \_\_\_\_\_  
 Print Name and Title  
 \_\_\_\_\_  
 Signature  
 \_\_\_\_\_  
 Date

Laboratory Director: \_\_\_\_\_  
 Print Name and Title  
 \_\_\_\_\_  
 Signature  
 \_\_\_\_\_  
 Date