



The Clinic Manager Hand Book:

A Guide to Operations & Leadership

This handbook provides a framework that promotes efficiency, supports leadership, and fosters a professional workplace. It outlines best practices, defines responsibilities, and standardizes procedures to ensure consistency across daily operations.

Note: The Clinic Manager Handbook is the "how to lead the team" guide. The companion MOA Handbook is the operational "how to do the job" guide and is referenced throughout. The information in this guide is current as of the date of publication. Consult the appropriate professionals for advice on further considerations.

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Table of Contents

<u>Chapter 1: Employee Recruitment</u>	5
<u>Best Practices: Hiring a Medical Office Assistant</u>	6
• <u>Stage 1: Pre-Interview Screening</u>	6
• <u>Pre-interview preparation</u>	6
• <u>Setting up interviews</u>	6
• <u>Stage 2: Conducting Interviews</u>	6
• <u>Phone interviews: first impression</u>	6
• <u>In-person interview: building a personal connection</u>	7
• <u>Behavioural, situational, and technical questions</u>	7
• <u>Identifying cultural fit</u>	8
• <u>Post-interview evaluation</u>	8
• <u>Communicating with unselected candidates</u>	8
• <u>Additional hiring tips</u>	8
• <u>Stage 3: Offer Letter</u>	9
<u>Best Practices: Onboarding Checklist</u>	10
• <u>Pre-arrival preparation</u>	10
• <u>First day orientation</u>	11
• <u>First week integration</u>	11
• <u>First month follow-up</u>	11
• <u>Three month follow-up</u>	11
• <u>Ongoing</u>	11
<u>Leadership Development</u>	12
• <u>Setting expectations</u>	12
• <u>Fostering motivation</u>	12
• <u>Conflict resolution</u>	13
• <u>Strategies for a positive work environment and effective team dynamics</u>	13
<u>Managing MOAs</u>	14
• <u>Tools for setting clear goals and expectations</u>	14
• <u>SMART goals framework</u>	14
• <u>Daily huddles and team meetings</u>	14
• <u>Job description manuals</u>	14
• <u>Standard operating procedures (SOPs)</u>	14
<u>Chapter 2 : Employee Retention</u>	15
<u>Best Practices: Compensation</u>	16
• <u>Reviewing and adjusting salary scales</u>	16
• <u>Aligning with cost of living</u>	16
• <u>Comprehensive benefits packages</u>	16
• <u>Performance-based incentives and bonuses</u>	16

Table of Contents (cont.)

<u>Professional Development</u>	17
• <u>Supporting missing MOA certifications</u>	17
• <u>Continuous education and training</u>	17
• <u>Internal career advancement</u>	17
• <u>External learning opportunities with peer MOAs</u>	17
<u>Setting a Positive Work Environment</u>	18
• <u>Promoting respect and inclusion</u>	18
• <u>Open communication and feedback</u>	18
• <u>Recognizing employee achievements</u>	18
• <u>Team building and social activities</u>	18
<u>Work-Life Balance</u>	19
• <u>Flexible working hours and remote work options</u>	19
• <u>Regular breaks and vacations</u>	19
• <u>Resources for stress management and mental health</u>	19
<u>Employee Engagement</u>	20
• <u>Regular employee surveys</u>	20
• <u>Verbal appreciation</u>	20
• <u>Involving employees in decision-making</u>	20
• <u>Regular staff meetings</u>	20
• <u>Platforms for sharing ideas and concerns</u>	20
<u>Practicum Student Integration</u>	21
• <u>Why practicum integration matters</u>	21
• <u>Key considerations when hosting a practicum student</u>	21
• <u>Outcomes of successful placements</u>	22
• <u>Increasing the likelihood of post-practicum retention</u>	22
<u>Index: Contact Information for Vetted Schools</u>	23
• <u>Public schools in Vancouver and the Lower Mainland</u>	23
• <u>Private schools in Vancouver and the Lower Mainland</u>	23
<u>References</u>	24
<u>Appendix A: Offer Letter Template</u>	25
<u>Appendix B: New Hire Onboarding & Training Template</u>	26
<u>Appendix C: Welcome Letter Template</u>	32
<u>Appendix D: Basic Employment Information Sheet Template</u>	33
<u>Appendix E: Confidentiality Agreement Template</u>	34
<u>Appendix F: Direct Deposit Form Template</u>	35
<u>Appendix G: Performance Evaluation Template</u>	36

Vancouver Division of Family Practice

Since our beginning in 2010, the Vancouver Division has grown to become a leader and facilitator of primary care, working to create an engaged physician community and a collaborative healthcare system in Vancouver. We are a not-for-profit society funded by the Government of BC and Doctors of BC, and work in partnership with the BC Ministry of Health, Vancouver Coastal Health, Providence Health Care, and other community organizations.

For the past 10 years, the Vancouver Division has grown and developed to lead, adapt, and respond to the needs of our community and healthcare system. As a member-driven organization our mandate has remained the same, to support and advocate for FPs.

As the largest division in the province, we represent more than 1,300 family physician members, including more than 1,200 actively practising physicians — accounting for approximately 95% of the locally practising family physicians in Vancouver and 24% of actively practising family physicians across British Columbia.



Our Mission

Vancouver Division will improve the primary care system in Vancouver for the benefit of our patients and members alike.



Our Goal

Building off the rich and diverse ways that FPs provide primary care, the overarching goal of the Vancouver Division is to support our physician members and advocate that they get the necessary tools to look after their patients. We strive to ensure that FPs remain central to system change in this community.

[Click here to learn more about the Vancouver Division of Family Practice](#)



General Inquires:

cbs@vancouverdivision.com
cbs@vancouverdivision.com

Employee Recruitment



A strong recruitment process lays the foundation for a successful clinic team. Hiring the right MOAs means attracting individuals whose skills, values, and approach align with the clinic's culture and patient care standards. A thoughtful and consistent recruitment process helps clinics build a reliable, engaged team and sets new employees up for long-term success.

Every clinic has unique needs. The following strategies can be adapted to help attract, assess, and hire the right MOAs for your team.

Best Practices: Hiring a Medical Office Assistant

Stage 1. Pre-Interview Screening

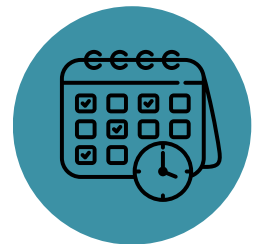
Pre-interview preparation

- Screen resumes & shortlist candidates.
- Evaluate relevant experience in healthcare and office administration.
- Confirm that candidates hold the necessary MOA certification or comparable educational qualifications.



Setting up interviews

- Schedule phone and in-person interviews as appropriate.
- Prepare a structured interview questionnaire for applicants that aligns with the clinic's values and culture. This is to effectively determine candidates' technical competencies, problem-solving abilities, communication skills, and knowledge of medical office terminology and protocols.



Stage 2. Conducting Interviews

Phone interviews - first impression

A 15- to-20-minute phone call provides an opportunity to gauge candidate fit through a few targeted questions. For example, asking what about the job posting caught the candidate's attention reveals initial interest and alignment with the clinic's mission, and offers a useful indicator of attention to detail.



In-Person interview - building a personal connection

An in-person interview reveals how a candidate communicates and conveys personality through non-verbal cues. Use the following structure to guide the conversation.

- **Introduction:** set the tone by sharing a brief overview of the clinic and the role, including the day-to-day responsibilities and any occasional special projects.
- **Qualifications and background:** explore the candidate's education and work experience, including schools attended and programs completed. When traditional qualifications are not fully met, consider whether equivalent skills have been developed in previous roles and whether investing in additional training is worthwhile.
- **Career vision:** gently explore their long-term career goals to assess if they're looking for long-term growth with your clinic. Example question: "What are your career goals and expectations moving forward?" When appropriate, share how the clinic supports career progression.
- **Clinic tour:** meeting on-site allows the candidate to experience the clinic environment firsthand. The interview also serves to present the clinic as a desirable place to work. A brief tour at the end of the interview highlighting features such as a renovated lunchroom, wellness space, or convenient transit access supports candidate engagement.



Behavioral, situational, and technical questions

Behavioural questions are a useful starting point because they structure the interview as a conversation, easing candidate nerves, and reveal how the candidate thinks, solves problems, and handles real-world situations.

- **Behavioural questions** draw on a candidate's real-life past experiences to assess communication, customer service, work ethic, emotional intelligence, adaptability, teamwork, and multitasking. Example: "Tell me about a time you confronted a difficult patient and how did you handle it?" or "Describe a situation where you had to work under a tight deadline. How did you prioritize your tasks?"
- **Situational questions** use hypothetical scenarios to evaluate problem-solving, attention to detail, conflict resolution, and decision-making. Example: "What would you do if you are asked to perform a task you've never done before?" or "How would you handle a conflict or disagreement with a team member?"
- **Technical questions** determine proficiency with the software and applications used at the clinic. Example: "Which medical software systems have you used? How proficient are you?"



Identifying cultural fit

Beyond technical skills, candidate values must align with the clinic's culture. Reference the clinic's mission and values during the interview to confirm alignment. Core values frequently include:

- Respect for patient care and communication
- Teamwork and adaptability
- And a commitment to long-term growth and continuous learning

Ask questions on their experience managing heavy workloads, supporting diversity and inclusion, resolving conflict, receiving feedback, managing stress, and adapting to change to help access these qualities.



Post-interview evaluation

Conduct a thorough reference check with promising candidates' previous employers and coworkers to verify the information provided and gain further insight into work performance. When needed, organize a follow-up session with shortlisted candidates. Evaluate candidates objectively, compare responses and essential skills across applicants, and select the best fit for the clinic. Once the right candidate has been identified, extend the offer and provide the necessary details and documentation to be completed before the start date



Communicating with unselected candidates

Provide respectful, constructive feedback to candidates who were not selected so that they can improve for future opportunities. Closing the interview with a statement that creates a professional impression and supports respectful follow-up by email. For example, "Thank you so much for your time. I have a few more interviews to conduct, but I'll be in touch with you soon about the results in either case."



Additional Hiring Tips



- **Employee referrals:** great employees often know other capable candidates. A referral bonus (for example, \$100) for current staff who refer a successful hire can reduce time-to-hire and recruitment cost.
- **Scout talent broadly:** strong customer service skills can transfer well to clinic roles. Considering candidates from adjacent service industries can build loyal employees.
- **Hire before the need is urgent:** plan ahead by hiring months in advance to ensure capacity before patient volume increases.

Stage 3: Offer Letter

An initial verbal offer of employment should be followed up in writing with a formal offer letter. Once signed by both parties, the offer letter becomes the contract between the clinic and the employee. The letter should be issued on clinic letterhead and signed by both the hiring or reporting manager and the accepting employee. See [Appendix A: Offer Letter Template](#).

At minimum, the offer letter should include:



- Name, address, email, and phone number of the candidate
- Position offered
- Duties and responsibilities (recommended these be listed as an attachment)
- Start date and time
- Schedule and hours
- Reporting manager
- Rate of pay and pay cycle, including the department responsible for payroll
- Dress Code
- Probation period
- Performance expectations and review timelines
- Vacation entitlement
- Benefits, where provided
- Confidentiality clause
- Termination clause
- Acceptance deadline



Best Practices: Onboarding Checklist

An onboarding checklist provides a reliable roadmap for welcoming new hires and supports their smooth integration into the clinic with a clear understanding of roles and responsibilities. Consistency and structure help new hires feel supported and set them up to be productive, engaged, and successful from day one. Print a copy of the checklist to ensure all steps are completed during onboarding. See [*Appendix B: New Hire Onboarding & Training Template*](#)

Pre-arrival preparation

Prepare a welcome packet for the MOA's first day. The package should include:

- Welcome letter (see [*Appendix C: Welcome Letter Template*](#))
- Essential forms for completion and signature:
 - Basic Employment Information Sheet (see [*Appendix D: Basic Employment Information Sheet Template*](#))
 - Confidentiality Agreement (see [*Appendix E: Confidentiality Agreement Template*](#))
 - Personal tax credit forms (TD1 and TD1BC)
 - Direct deposit authorization for payroll (see [*Appendix F: Direct Deposit Form Template*](#))
 - Extended health benefits enrolment, where applicable
 - Shift agreement, where applicable
 - Clinic-specific documents
- MOA job description
- Employee handbook, including reference to the BC Employment Standards Act
- Contact list
- Office map
- Training plan with timelines

Prepare the workstation with the necessary supplies and equipment and ensure access to relevant software and systems:

- Login credentials
 - EMR
 - Payroll or time and attendance system
 - Other software applications used at the clinic
- Email setup and any additional system access



First day orientation

- Welcome the new employee and introduce team members.
- Conduct a tour of key office spaces, including the workstation, break room, examination rooms, providers' area, emergency exits, and supply areas.
- Provide an overview of clinic culture and values.
- Highlight the importance of the MOA role in clinic operations.
- Begin initial training on office procedures, tools, and software (**refer to the MOA Handbook for a detailed training outline**).
- Introduce key policies, including attendance, dress code, and confidentiality.
- Review performance expectations and goals.
- Discuss payroll timing and frequency and identify the point of contact for payroll questions.
- Provide an overview of documentation, training schedules, and timelines.
- Assign a mentor or buddy for guidance.

First week integration

- Conduct detailed training on specific job duties and software systems.
- Introduce ongoing projects and clinic workflows.
- Hold regular check-ins with the supervisor and new employee to address questions and concerns.

First month follow-up

- Continue training and development sessions.
- Conduct a performance review and feedback session.

Three month follow-up

- Conduct the probationary performance review and feedback session.
- Create a plan for approaching the performance review in the case of any performance issues (e.g. placing the employee on a performance improvement plan or possible termination plan).

Ongoing

- Encourage participation in team meetings and activities.
- Ensure that the new hire continues to feel integrated and supported.



Leadership Development

Effective leaders guide healthcare teams through complex challenges, drive innovation, keep employees engaged, and promote a culture of patient safety and quality improvement. This section provides tools and strategies for managing and supporting MOAs, including how to set expectations, foster motivation, and practice effective conflict resolution.

Setting expectations

Set clear expectations and communicate them often. It helps to reinforce verbal directions with written ones (e.g. provide written job descriptions or office guidelines). Ensure they understand their obligations during your check-ins and performance evaluations. Below are some examples:



Example: Communication expectations

When onboarding a new staff member, clearly outline expectations for responding to physicians, documenting patient interactions, escalating urgent issues, and communicating absences. Reinforcing these expectations during the first few weeks can help prevent misunderstandings and build confidence.

Example: Attendance and punctuality

If an MOA is consistently arriving late, address the concern early through a private conversation. Clarify expectations around start times, discuss the impact on clinic flow and patient experience, and explore whether there are underlying barriers contributing to the issue. Follow up with a written summary of expectations and check in again after an agreed upon timeframe.

Example: Managing competing priorities

If staff are struggling to balance front desk responsibilities with administrative tasks, work together to clarify priorities during busy clinic periods. Providing guidance on what tasks should be escalated, delayed, or delegated can reduce stress and improve consistency.

Fostering motivation

Motivation supports performance and job satisfaction. Recognize contributions through praise, bonuses or recognition programs and support professional growth with continuing education and career development opportunities. Foster a positive, respectful workplace culture and promote work-life balance with flexible scheduling and manageable workloads.

Practical approaches to supporting and onboarding new staff:

- Set clear expectations early regarding workflows, communication norms, and responsibilities.
- Schedule regular check-ins during onboarding to answer questions and provide feedback.
- Encourage two-way communication so new staff feel comfortable raising concerns or identifying gaps in training.
- Create feedback loops that allow staff to continuously improve and feel supported in their development.



Conflict resolution

Effective conflict management maintains a healthy workplace. Address issues early through open communication and active listening, ensuring all perspectives are heard. Approach conflicts objectively and professionally, encourage a safe environment for speaking up, and involve a neutral third party if needed. Focus on practical, solution-oriented outcomes rather than focusing on mistakes.

Practical framework for navigating team conflict:

- Address concerns early before frustration escalates or affects the broader team.
- Gather information neutrally and avoid making assumptions before understanding all perspectives.
- Facilitate respectful, solution-focused conversations between staff where appropriate.
- Focus discussions on behaviours, impacts, and future expectations rather than assigning blame.
- Consider involving a neutral third party (e.g. HR or senior leadership) if the situation cannot be resolved informally.

Strategies for a positive work environment and effective team dynamics

- **Foster open and transparent communication:** open communication and active listening enable team members to engage authentically, recognize one another's capabilities, and collaborate effectively. Effective communication reduces misunderstandings and improves outcomes.
- **Promote teamwork and collaboration:** team-based work builds trust, motivates focus on shared goals, and improves overall productivity.
- **Recognize and reward contributions:** appreciation motivates employees to perform at their best. Recognition can take the form of verbal acknowledgement, an employee-of-the-month feature, or small incentives.
- **Prioritize work-life balance and well-being:** a healthy balance supports engagement, creativity, and authenticity at work. Stress management workshops and mental health resources can also help prevent burnout.
- **Provide opportunities for professional growth:** equitable growth opportunities boost morale, increase job satisfaction, reduce stress, and build loyalty.
- **Maintain an inclusive work culture:** collaborative decision-making creates a sense of belonging and mutual trust, supporting innovation, creativity, and strong outcomes.
- **Address workplace conflict proactively:** leaders should mediate by understanding all perspectives. Emotional intelligence, the ability to recognize and regulate emotions, is central to constructive resolution.

Managing MOAs

Ongoing feedback is more effective than waiting for annual reviews. Address issues at the time they occur to reinforce expectations and support employees in making course corrections while there is still time to succeed. Formal performance evaluations should contain no surprises.

Use structured templates and checklists to support consistent supervision and feedback. See Appendix G: Performance Evaluation Template.

Tools for setting clear goals and expectations

Clear goals and expectations support efficiency, accountability, and quality patient care. The following are several tools and strategies:

SMART goals framework

The SMART framework supports plans that are Specific, Measurable, Achievable, Relevant, and Time-bound. Setting short- and long-term SMART goals provides employees with a clear path and a view of the broader trajectory. Breaking long-term goals into short-term milestones sustains motivation through incremental accomplishments and offers a sense of purpose, helping employees stay on track and work with focus and consistency.

Daily huddles and team meetings

Regular meetings provide a forum to discuss current work, resolve issues, set new targets, and confirm alignment across the team. They also create space for employees to raise challenges and share feedback, supporting collaborative goal achievement.

Job description manuals

A detailed, written manual offers employees a reliable reference for daily tasks and clarifies clinic expectations. A well-developed manual provides a step-by-step guide for each routine activity, from the opening of the clinic to its close.

Standard operating procedures (SOPs)

Standardized SOPs help employees understand the processes and protocols of a medical office, including patient intake, appointment scheduling, billing, complaint handling, and emergency protocols. SOPs establish consistent expectations across the team, supporting reliability, and reducing errors.



Employee Retention



A positive work environment is essential to keeping employees engaged and committed long term. MOAs are central to clinic operations, and their satisfaction directly affects organizational success. A supportive, healthy, and inclusive workplace helps employees feel valued, connected, and motivated to stay.

Every clinic is different. The following strategies can be tailored to support and retain the MOA team.

Best Practices: Compensation

Reviewing and adjusting salary scales

Fair and transparent pay practices help employees feel that their contributions are recognized and valued. Regular performance reviews and equitable pay support engagement and retention.



Aligning with cost of living

Keeping wages aligned with rising living costs reduces financial stress, which otherwise affects performance and morale. Staying current with inflation and cost-of-living changes supports a fair salary model that balances operating costs with MOA compensation needs.



Comprehensive benefits package

Benefits such as extended health coverage, retirement plans, fitness allowances, and scrub allowances improve quality of life within and outside of work. A strong benefits package helps reduce overall costs, increase productivity, retain talent, and shape the clinic's culture.



Performance-based incentives and bonuses

When salary increases are not feasible, annual bonuses and recognition programs reward loyalty and strong performance and demonstrate management's appreciation for those who contribute meaningfully to the clinic.



Professional Development

Supporting professional development helps employees grow their skills, build confidence, and remain current in changing environments. Investment in learning signals that employees are valued, which drives higher engagement, stronger performance, and long-term loyalty.

Supporting missing MOA certifications

Financial support for obtaining missing certifications improves patient care, compliance, and operational efficiency. Common certifications include the Medical Office Assistant (MOA) Certificate, Basic Life Support (BLS) and CPR, the Workplace Hazardous Materials Information System (WHMIS), Electronic Medical Records (EMR) and Billing, Privacy and Confidentiality (Personal Information Protection Act (PIPA) and Personal Information Protection and Electronic Documents Act (PIPEDA)), and Infection Control and Prevention.

Continuous education and training

Ongoing development can be supported through partnerships with educational institutions, in-house sessions, mentorship programs, and flexible scheduling for learning. Encouraging participation in workshops, seminars, and conferences by funding or coverage of registration fees. This helps MOAs stay current with administration practices, EMR advancements, and regulatory change, while improving performance and retention.

Internal career advancement

Clinic leaders can develop, mentor, and promote employees through a range of approaches: pairing junior employees with experienced mentors, offering shadowing opportunities in leadership roles, considering internal candidates for higher positions before external recruitment, and providing promotion-based salary and title adjustments.

External learning opportunities with peer MOAs

Establishing connections with neighbouring clinics creates opportunities for MOAs to build professional and social networks, learn different workflows, and gain experience with administrative tasks not practiced in their own clinic. Out-of-work activities such as peer networking events, community health events, workshops, and online discussion groups support this growth. These initiatives benefit both MOAs and healthcare organizations by improving patient care, expanding skills, and fostering a culture of continuous development.



[Encourage MOAs to join the Vancouver MOA Network to find opportunities to connect with peers, stay up to date on new MOA-facing resources, and participate in education sessions.](#)

Setting a Positive Work Environment

A positive work environment supports employee well-being, collaboration, and productivity. A healthy workplace culture reduces burnout, strengthens morale, and helps attract and retain talent, ultimately driving stronger performance and long-term success.

Promoting Respect and Inclusion

A diverse and inclusive workplace fosters creativity and a wider range of perspectives. Combining different viewpoints generates new approaches to shared goals. Promoting inclusion and equity creates an environment where every employee feels valued and respected.

Open Communication and Feedback

Communication directly affects employee engagement and loyalty by creating a workplace where contributions are heard and acted upon. Provide accessible channels of interaction such as internal messaging platforms, video conferencing, one-on-one meetings, an open-door policy, and anonymous surveys to surface concerns and gather honest feedback.

Recognizing Employee Achievements

Recognition and reward are powerful motivators that boost morale and encourage continued performance. Acknowledgement supports innovation, satisfaction, and reduced turnover.

Team Building and Social Activities

Activities and gatherings strengthen connections within the team, supporting collaboration and a positive workplace.

During work hours:

- Celebrate clinic achievements and milestones.
- Recognize birthdays and significant personal occasions.
- Organize themed days, such as Valentine's Day, Pink Shirt Day, or Halloween.
- Acknowledge professional appreciation days for physicians, nurses, and MOAs.
- Host lunch-and-learn sessions.

Outside work hours:

- Host occasional gatherings or retreats to support relationship-building outside the daily workflow.



Work-Life Balance

MOAs frequently work in high-pressure environments while performing fast-paced administrative tasks such as scheduling, patient communication, billing, and managing difficult interactions which can lead to burnout. Maintaining a healthy work-life balance is essential for reducing stress, supporting physical and mental health, and increasing job satisfaction.

Flexible Working Hours and Remote Work Options

Competitive compensation and benefits alone do not always sustain long-term retention. Flexible scheduling, shift swapping, job sharing, and telecommuting are practical alternatives where the work permits. Employees with greater control over their schedules generally report lower stress and improved work-life balance.

Regular Breaks and Vacations

- **Implement mandatory break requirements:** employees in British Columbia are legally entitled to scheduled breaks and meal periods under the Employment Standards Act. Encourage MOAs to take their required breaks to prevent fatigue, and support compliance through scheduling and cross-coverage so that breaks can be taken without compromising patient care.
- **Offer paid time off and encourage vacation use:** a pro-vacation culture supported by paid time off, pre-planned coverage, and cross-training keeps clinic operations running smoothly while employees take meaningful breaks.

Resources for Stress Management and Mental Health

- **Access to Employee Assistance Programs (EAPs):** many BC healthcare organizations provide EAPs that deliver confidential counselling, mental health support, and stress management tools. Inform MOAs about available services, including phone and virtual counselling options.
- **Workplace Mental Health Toolkit:** the Province of BC offers a [Workplace Mental Health Toolkit](#) with leadership resources for managing psychosocial factors such as workload and team support. Leaders can adapt the toolkit for MOA-specific action plans.
- **Peer support programs:** peer networks provide an informal, secure space for MOAs to share coping strategies and experiences. Organizations including the BC Public Service position peer support as a core element of workplace mental health.

Top Motivator

For the first time in over two decades, work-life balance has surpassed pay as the primary motivator for employees.



Employee Engagement

Regular Employee Surveys

Employee surveys help the clinic understand staff feedback and needs and inform employee-centric decisions. Visible action in response to survey results builds trust and increases future participation.

Verbal Appreciation

Employees who feel appreciated for their work report greater satisfaction and commitment. Positive reinforcement promotes collaborative teamwork, reduces burnout, and boosts motivation, contributing to a supportive workplace culture.

Involving Employees in Decision-Making

Inviting employee recommendations builds engagement and accountability. When staff contribute ideas on workflow, patient care strategies, and clinic policies, they develop ownership and feel heard, which produces innovative solutions and stronger results.

Regular Staff Meetings

Staff meetings provide a forum to share input, raise concerns, and stay current with clinic updates and objectives. Meetings also reinforce expectations, recognize achievements, and strengthen teamwork, contributing to both employee satisfaction and quality of patient care.

Platforms for Sharing Ideas and Concerns

360-degree feedback tools such as SurveyMonkey, PeopleGoal, and Survey Sparrow support input across all levels of the organization and foster continuous improvement. Anonymous feedback collection through tools like Google Forms, Performly, or a suggestion box encourages honest communication. Team meetings, open forums, and digital collaboration platforms such as Microsoft Teams create real-time opportunities to contribute ideas and discuss concerns.



Practicum Student Integration

A structured onboarding process for MOA practicum students supports a successful placement and increases the likelihood of post-practicum retention.

Why Practicum Integration Matters

Integrating MOA practicum students benefits clinics in several ways:

- **Workforce development:** the growing aging population requires a larger workforce of trained healthcare professionals. Practicum placements support a pipeline that addresses workforce shortages.
- **Cost-effective recruitment:** hosting practicum students supports the training of potential future employees, reducing recruitment costs and the risks of hiring inexperienced staff.
- **Operational efficiency:** practicum students can assist with time-consuming administrative tasks, easing existing workloads and improving operations.
- **Community connection:** educational partnerships demonstrate a clinic's commitment to the growth of the local community and to professional development.

Key Considerations When Hosting a Practicum Student

- **Clear role definitions:** develop detailed job descriptions and learning objectives to align expectations between the student and the clinic.
- **Supervision and mentorship:** assign an experienced staff member as a mentor to provide students with feedback and guidance.
- **Regulatory compliance:** ensure adherence to provincial legal and institutional requirements, including patient confidentiality (e.g. PIPA) and workplace safety standards.
- **Liability:** coordinate with the practicum student's school to clarify liability and insurance coverage in the event of student misconduct.

The Application and Matching Process Phases:



- **Application:** schools coordinate practicum placements, and students submit resumes with references to participating clinics.
- **Matching:** clinics review applications and interview candidates to confirm compatibility with clinic workflows.
- **Placement agreement:** a formal agreement defines responsibilities for both parties and supports a smooth integration process.

Practicum Student Integration (cont.)

Outcomes of Successful Placements

Between 75 and 85 percent of MOA students secure employment directly from their practicum placement, reflecting strong demand for MOAs across BC's healthcare sector. The Province of BC projects approximately 4,260 job openings for medical administrative assistants between 2022 and 2032, reinforcing the profession's strong outlook.

Increasing the Likelihood of Post-Practicum Retention

- **Provide growth opportunities:** highlight career pathways, such as advanced certifications or managerial roles.
- **Foster a positive environment:** create an inclusive, supportive culture in which students feel valued.
- **Offer competitive compensation:** incentivize retention with fair wages and a meaningful benefits package for permanent roles.



Index: Contact Information for Vetted Schools

The following institutions in British Columbia offer MOA programs. Establishing relationships with reputable schools supports a reliable practicum pipeline.

Public Schools in Vancouver and the Lower Mainland

British Columbia Institute of Technology (BCIT)

📍 Location: Burnaby, BC
☎ Phone: 604-434-5734
✉ Email: info@bcit.ca
🌐 Website: www.bcit.ca

Vancouver Community College (VCC)

📍 Location: Vancouver, BC
☎ Phone: 604-871-7000
✉ Email: info@vcc.ca
🌐 Website: www.vcc.ca



Private Schools in Vancouver and the Lower Mainland

Sprott Shaw College

📍 Locations: Vancouver, Surrey, Burnaby, Richmond, New Westminster, Maple Ridge, Abbotsford
☎ Phone: 1-888-430-6222
✉ Email: info@sprottshaw.com
🌐 Website: www.sprottshaw.com

CDI College

📍 Locations: Vancouver, Burnaby, Surrey, Richmond, Abbotsford
☎ Phone: 1-800-370-5158
✉ Email: admissions@cdicollege.ca
🌐 Website: www.cdicollege.ca

Cambria College

📍 Locations: Vancouver, Surrey, Richmond
☎ Phone: 1-844-299-0606
✉ Email: info@cambriacollege.ca
🌐 Website: www.cambriacollege.ca

Vancouver Career College

📍 Locations: Vancouver, Burnaby, Surrey, Abbotsford, Coquitlam
☎ Phone: 1-800-651-1067
✉ Email: admissions@career.college
🌐 Website: www.career.college

Stenberg College

📍 Location: Surrey, BC
☎ Phone: 1-866-580-2772
✉ Email: info@stenbergcollege.com
🌐 Website: www.stenbergcollege.com

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Appendix A: Offer Letter Template

[Date]

[Employee's name]

[Employee's address]

[Employee's city, BC, postal code]

[Employee's email]

[Employee's phone number]

Dear [Employee's first name],

This letter outlines the terms of employment with [Clinic Name].

We will employ you, [employee's full name], in the position of Medical Office Assistant beginning on [start date and time].

Duties and responsibilities

Your duties and responsibilities are described in the attached Job Description, which is part of this agreement.

Work schedule and hours

[Employee's schedule, including days and hours].

This schedule may change depending on the needs of the clinic.

NOTE: If there is a possibility of the schedule being different at times in the future, outline here what those changes could be or outline the hours of the clinic advising the shifts could be anywhere within those clinic hours.

Reporting lines

The Medical Office Assistant reports to the [who the MOA will report to e.g. Clinic Manager, Senior MOA].

Compensation

Your pay rate as a Medical Office Assistant is [rate per hour]. You will be paid by [direct deposit, cheque or other]. This will occur [frequency of pay periods e.g. every second Friday].

Work clothing

The clinic's dress code for MOAs is [dress code e.g. business casual/scrubs].

Appendix B: New Hire Onboarding & Training Template

Employee information

Name: _____

Hire Date: _____

Supervisor: _____

Date of Completion: _____

[Download Here](#)

Onboarding Checklist

Task	Completed	Notes
<i>Before the new employee arrives</i>		
Computer Account Created	☐	
HR Chart Created	☐	
<i>When the new employee starts</i>		
Complete HR New Hire Documentation	☐	
Resume	☐	
Contract/Service Agreement	☐	
Basic Employment Information	☐	
CRA Forms	☐	
Voided Cheque	☐	
Create Payroll Account	☐	
Add Contact Information to Clinic Contact List	☐	
Set Up email	☐	
Create email signature	☐	
Create [EMR] User Account	☐	

Appendix B: New Hire Onboarding & Training Template con't

<i>Operations</i>		
Clinic Introduction	☐	
Clinic Website	☐	
Doctor of the Day/Doctor On Call	☐	
Clini Policies Manual	☐	
Dress Code	☐	
Work Hours (Lunch, Meetings)	☐	
Vacation/Time Off Request Policy	☐	
Use of Computers, Phone & Internet	☐	
Discuss Payroll Frequency	☐	
Important Dates Added to Calendar	☐	
(Birthday, Work Anniversary and Reviews)	☐	
Extended Health Benefits (3 Months)	☐	
Parking Options	☐	
Building Access – After Hours	☐	
FOB #	☐	
<i>Occupational Health & Safety</i>		
Policy Handbook	☐	
Incident Reporting	☐	
Needle Stick Injury	☐	
Sharps Disposal	☐	
WHMIS (Annual Training)	☐	
Hand Hygiene (Annual Training)	☐	
Fire	☐	

Appendix B: New Hire Onboarding & Training Template con't

Earthquake	☐	
Personal Protective Equipment	☐	
Biomedical Waste/Pharmaceutical Waste	☐	
Emergency Exits	☐	
Refuge Areas	☐	
Fire Extinguishers	☐	
Emergency Lighting	☐	
Training		
<i>Medical Office Assistant – Front Desk</i>		
Opening Duties	☐	
Closing Duties	☐	
Phone Etiquette	☐	
Mail (Incoming & Outgoing)	☐	
Point of Sale Terminal	☐	
Office Supplies	☐	
Clinic Email	☐	
Providers Schedules	☐	
<i>Medical Office Assistant Roles (Introduction)</i>		
Billing	☐	
Referrals	☐	
Pharmacy	☐	
TCI (To Come In)	☐	
Diagnostics	☐	
Tasks	☐	

Appendix B: New Hire Onboarding & Training Template con't

Records	☐	
<i>[EMR] Tasks</i>		
[EMR] Navigation	☐	
[EMR] Scanning	☐	
[EMR] Scheduler	☐	
Create a Patient File	☐	
Creating an Appointment	☐	
Utilizing Appointment Notes	☐	
Identifying Patient Status (Reg/Dereg)	☐	
Cancelling vs. Removing Appointments	☐	
Arriving a Patient	☐	
Verifying MSP	☐	
Updating Appointment Status	☐	
Patient Portal	☐	
Appointment Reminders	☐	
No Show/Late Cancellation Process	☐	
Messages and Notes (Date, Initials)	☐	
Patient Intake Forms and Files	☐	
Requests for Medical Records	☐	
Authorization to Release Medical Records	☐	
Faxing From a Patient File (EFax)	☐	
Fax Queue	☐	
Prescription Refill	☐	
Creating an Invoice	☐	

Appendix B: New Hire Onboarding & Training Template con't

Process a Payment	☐	
Pathways	☐	
<i>Medical Office Assistant – Runner</i>		
Exam Room Usage (Dr's Preference)	☐	
Room Prep	☐	
Room Stock	☐	
Equipment	☐	
Thermometers	☐	
Baby Scale	☐	
Braun Baby Thermometer	☐	
Scales	☐	
Doppler Machines	☐	
Day Sheet	☐	
Physician Huddle	☐	
Inventory	☐	
Order Vaccines	☐	
Medical Supplies Order	☐	
Inventory Log/Monitor	☐	
Autoclave	☐	
Scrubbing/Washing	☐	
Cleaning and Drying	☐	
Ultrasonic Cleanser	☐	
Biological Indicator	☐	
Instrument Labeling	☐	

Appendix B: New Hire Onboarding & Training Template con't

Instrument Stock and Inventory	☐	
Monthly Cleaning and Disinfecting	☐	
Vaccines and Prep	☐	
Urine Tests	☐	
Urinalysis	☐	
Prenatal	☐	
Pregnancy	☐	
Pap	☐	
CPX	☐	
Pelvic Exam/STI Test	☐	
Instrument Stock and Inventory	☐	
Monthly Cleaning and Disinfecting	☐	
Vaccines and Prep	☐	
Urine Tests	☐	
Urinalysis	☐	
Prenatal	☐	
Pregnancy	☐	
Pap	☐	
CPX	☐	
Pelvic Exam/STI Test	☐	

Appendix C: Welcome Letter Template

[Date]

Dear [Employee's first name],

Welcome to the [Clinic Name] Medical Office Assistant team.

[Insert a paragraph describing the clinic, including practice type (family, specialist, etc.), practitioners, and team composition.]

[Insert a paragraph describing the specific team the employee will be joining.]

[Insert a paragraph expressing the team's enthusiasm about the new hire joining, how they'll contribute to the team/clinic and how much you are looking forward to working with them.]

Sincerely,

[Name of the reporting manager]
and the [Clinic Name] team

Appendix D: Basic Employment Information Sheet Template

Employee information

Full name: _____

Address: _____

Home phone: _____

Cell phone: _____

Email address: _____

Date of birth: _____

Emergency contact

Full name: _____

Address: _____

Primary phone: _____

Cell phone: _____

Relationship: _____

Job information

Job title: _____

Manager: _____

Start date: _____

Hourly rate: _____

Appendix E: Confidentiality Agreement Template

Confidentiality Agreement for Employees of *[Enter Clinic Name]*

I am aware that the Medical Practice has policies and procedures regarding the privacy, confidentiality and security of personal information and that it must comply with British Columbia's Personal Information Protection Act. I have read the current version of these policies and procedures and understand the requirements.

During my employment with *[Clinic Name]*, I acknowledge that I will be given access to patient information that is deemed sensitive and/or confidential.

- I shall not share this information with anyone within or outside of the Medical Practice who is not authorized to have this information.
- I shall not publish such information.
- I shall not communicate such information without authority.
- I shall not use or disclose any such information for other than authorized official purposes.
- I shall not remove any such information from the premises without permission
- Should I receive any such information, I will accept full responsibility to ensure confidentiality, accuracy, and safekeeping of this information.
- I shall take every reasonable step to prevent unauthorized parties from examining and/or copying any such information.
- I shall observe and comply with all policies and procedures of the medical practice with respect to privacy, confidentiality, and security of information during and after my term of employment.

I understand that any breach of the policies and procedures, including misuse or inappropriate disclosure of information, may be grounds for termination of my employment and/or legal action

Employee name (please print): _____

Signature: _____

Date (dd/mm/yy): _____

Witness (Privacy Officer) name (please print): _____

Signature: _____

Date (dd/mm/yy): _____

Appendix F: Direct Deposit Form Template

Direct Deposit Authorization Form

By completing this form, you consent for [Clinic Name] to deposit your wages, minus applicable taxes and deductions, directly into your bank account on a [frequency of pay]. This form is not valid without the signature of the account holder.

Name (please print): _____

Address: _____

City, Province, Postal Code: _____

Phone: _____

Date (dd/mm/yy): _____

Signature: _____

Banking information

Account number: _____

Transit number: _____

Financial institution number: _____

JANE SPECIMEN
2345 MAIN STREET
VANCOUVER, BC V6A 4G2

DATE 20 YY-MM-DD
Y Y Y Y M M D D

PAY TO THE ORDER OF _____ \$ _____

Vancity
Make Good Money™

VANCOUVER CITY SAVINGS CREDIT UNION
VANCITY CENTRE COMMUNITY BRANCH
183 TERMINAL AVENUE, TEL: 604.877.7013
VANCOUVER, BC V6A 4G2

MEMO _____

100 DOLLARS Security features included. Details on back.

12345 809 100000026054

■ Branch/Transit #

■ Financial institution #

■ Account #

Appendix G: Performance Evaluation Template

Employee information

Full name: _____

Job title: _____

Supervisor: _____

Date of evaluation: _____

[Download Here](#)

Performance categories

- Clinical Skills: Task Competence (e.g., patient intake, vitals, EHR management):

- ☐ Needs Improvement
- ☐ Meets Expectations
- ☐ Exceeds Expectations

Comments: _____

- Administrative Skills: Task Competence (e.g., appointment scheduling, insurance verification, billing):

- ☐ Needs Improvement
- ☐ Meets Expectations
- ☐ Exceeds Expectations

Comments: _____

- Communication Skills: Interaction with patients and staff (clear, respectful, professional):

- ☐ Needs Improvement
- ☐ Meets Expectations
- ☐ Exceeds Expectations

Comments: _____

- Time Management & Efficiency: Ability to prioritize tasks, meet deadlines, and manage workload effectively:

- ☐ Needs Improvement
- ☐ Meets Expectations
- ☐ Exceeds Expectations

Comments: _____

Appendix G: Performance Evaluation Template con't

- Teamwork and Collaboration: Works well with colleagues, displays positive attitude and cooperates in team efforts:

- ☐ Needs Improvement
☐ Meets Expectations
☐ Exceeds Expectations

Comments: _____

- Adaptability: Adjusts well to new tasks, changes in workflow, or unanticipated challenges:

- ☐ Needs Improvement
☐ Meets Expectations
☐ Exceeds Expectations

Comments: _____

- Professionalism: Follows office policies, maintains confidentiality, and behaves ethically:

- ☐ Needs Improvement
☐ Meets Expectations
☐ Exceeds Expectations

Comments: _____

- Knowledge of Medical Terminology & Procedures: Understands medical terms, codes, and office-specific procedures:

- ☐ Needs Improvement
☐ Meets Expectations
☐ Exceeds Expectations

Comments: _____

- Patient Care: Ensures patient comfort and satisfaction, addresses concerns promptly:

- ☐ Needs Improvement
☐ Meets Expectations
☐ Exceeds Expectations

Comments: _____

- Initiative and Problem Solving: Demonstrates proactivity and suggests improvements when necessary:

- ☐ Needs Improvement
☐ Meets Expectations
☐ Exceeds Expectations

Comments: _____

Appendix G: Performance Evaluation Template con't

Overall rating

- ☐ Needs Improvement
- ☐ Meets Expectations
- ☐ Exceeds Expectations

Supervisor's comments: _____

Employee self-assessment (optional)

What aspects of your performance do you feel are your strengths?

What areas do you feel you need improvement or additional training in?

Goals for the next evaluation period: _____

Action plan

Development goals: _____

Training or resources needed: _____

Timeline for improvement: _____

Employee acknowledgement

Signature: _____

Date: _____

Appendix G: Performance Evaluation Template con't

Feedback Areas

- Job knowledge

- ☐ Demonstrates accurate knowledge of clinical and administrative duties.
- ☐ Understands office software and technology.
- ☐ Stays current with relevant industry standards.

- Quality of work

- ☐ Completes tasks with attention to detail.
- ☐ Consistently meets deadlines.
- ☐ Demonstrates consistency in work quality

- Communication skills

- ☐ Speaks clearly and professionally with patients.
- ☐ Listens effectively and provides appropriate responses.
- ☐ Maintains professionalism in written communication.

- Organization and time management

- ☐ Prioritizes tasks effectively.
- ☐ Manages workflow and reduces unnecessary delays.
- ☐ Uses time efficiently throughout the day.

- Customer service

- ☐ Displays empathy and compassion toward patients.
- ☐ Handles patient concerns or issues in a timely manner.
- ☐ Demonstrates patience under stressful conditions.

- Teamwork

- ☐ Works well with the healthcare team.
- ☐ Willing to assist colleagues when needed.
- ☐ Adapts to team dynamics.

- Professionalism

- ☐ Adheres to the dress code and office policies.
- ☐ Maintains confidentiality at all times.
- ☐ Demonstrates a positive attitude and work ethic.

- Initiative

- ☐ Takes responsibility for duties without constant direction.
- ☐ Proactively identify areas for improvement.
- ☐ Suggests process improvements where appropriate.

Appendix G: Performance Evaluation Template con't

Feedback and action points

Positive feedback: _____

Areas for improvement: _____

Specific goals for the next period: _____

Employee feedback

Is additional training or support needed? _____

Are there concerns the employee would like to discuss? _____

Supervisor's signature: _____

Employee's signature: _____



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Thank You
