

## Critical Access Hospital Finance and Operations Webinar Series

### Building Resilient Organizations: HR Best Practices Across the Employee Journey February 17, 2026

*The mission of the Oregon Office of Rural Health is to improve the quality, availability and accessibility of health care for rural Oregonians.*

*The Oregon Office of Rural Health's vision statement is to serve as a state leader in providing resources, developing innovative strategies and cultivating collaborative partnerships to support Oregon rural communities in achieving optimal health and well-being.*

## Webinar Logistics

- Audio is muted for all attendees.
- Select  to populate the chat feature on the bottom right of your screen. Please use either the chat function or raise your hand  on the bottom of your screen to ask your question live.
- Presentation slides and recordings will be posted shortly after the session at: <https://www.ohsu.edu/oregon-office-of-rural-health/critical-access-hospital-programs>
- This is not legal guidance
- This is practical compliance guidance focused on risk reduction and real-world application



## Today's Agenda

❖ Foundational Compliance



**Cassi Bell** is a senior HR consultant with 14 years of experience specializing in compliance, business strategy, employee relations, and scalable growth strategies for her clients. She is an expert in California labor law and employee risk mitigation, ensuring compliance while driving sustainable expansion.

❖ Recruitment

❖ On/Off Boarding



**David Sanchez-Aguilera** brings more than 8 years of experience in Human Resources, the last six of which have been in fractional HR consulting. He has advised clients in functional areas of HR including talent acquisition, employee relations, and HR compliance and operations. He is an expert in inclusive workplace design.

❖ Benefits Administration



**Alex Zubia** is a senior consultant with over 8 years of progressive experience leading global benefits, leave, and HR operations programs across multinational environments. She is highly skilled in strengthening operational infrastructure and implementing scalable HR systems that improve efficiency and elevate employee experience.

# Before the Journey Begins

## *Foundational Compliance*

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# Compliance as a Risk Management Strategy

## Best Practice

- When built correctly, foundational compliance ensures consistency, minimizes manager discretion, reduces exposure, and strengthens trust across the employee's journey.

## Key Takeaways

- Did you know that when healthcare employers lack clear written policies or fail to follow their own procedures, those policies are routinely used as evidence against them in investigations and litigation?

## Healthcare Callout

- In data released by the EEOC in 2026, retaliation and harassment charges made up over 50 percent of all charges filed, with healthcare remaining one of the most frequently cited industries.

# Strategic Compliance for Small to Mid-Size Employers

## Best Practice

- An employee handbook is not a communication document.
- It is a risk control document that hold both parties accountable with the evolving state and federal regulations.
- If policies do not reflect current law or actual practice, it can do more harm than help.

## Key Takeaways

- Reframe how we think about handbooks.
- A compliant handbook is not about checking a box. It's the organizational infrastructure for legal compliance and preventing hefty fines.

## Healthcare Callout

- Healthcare organizations can significantly reduce HR risk without increasing headcount by implementing structured audits, manager training, and standardized documentation practices.

# Compliance- First Handbook Design for 2026

## Best Practice

- Critical policy areas that reduce exposure.
- When to update and how often.
- Why acknowledgment tracking matters.

## Healthcare Callout

- Handbooks should reflect current law and actual company practice.

## Key Takeaways

- At Will statement
- Anti-harassment and reporting
- Wage and hour standards
- Leaves of absence
- Disability accommodation process
- Conduct and discipline
- Technology and confidentiality

# Employee Experience & Sustainable Growth

## Best Practices

- Most preventable claims come from inconsistent application of policies.
- Clear structure reduces manager discretion which lowers liability.
- Unenforced policies increase legal risk.

## Key Takeaway

- Policies alone do not create compliance. Compliance exists only when policies are trained, enforced, and applied consistently by managers.

## Healthcare Callout

- In the most recently reported enforcement cycle released in 2026, the Department of Labor recovered over \$250 million in back wages, with healthcare among the highest contributing industries due to recordkeeping failures and misclassification.

# Job Descriptions As A Risk Management Strategy

## Key Takeaways

- Without clear essential functions cannot evaluate accommodations or classify exempt vs non-exempt.
- Outdated or vague job descriptions are a liability.

## Best Practice

- Essential elements include Position purpose, essential duties with time percentages, KSAs, physical demands, work environment, reporting structure.
- Support recruiting accuracy, compensation benchmarking, FLSA classification, ADA functions, performance reviews.

## Healthcare Callout

- The Department of Labor reports that employee misclassification remains one of the most common violations found in healthcare audits, often tied directly to outdated or inaccurate job descriptions.

# Compliance- First Job Description for 2026

## Key Takeaways

- Job descriptions are one of the first documents requested during ADA accommodation reviews and wage and hour audits because they determine essential functions and exemption status.

## Best Practice

- They are routinely requested in ADA accommodation reviews and wage-and-hour audits because they establish essential job functions and help determine exemption status.

## Healthcare Callout

- In 2026 the Department of Labor reports that employee misclassification remains one of the most common violations found in healthcare audits, often tied directly to outdated or inaccurate job descriptions.

# Strategic Compliance for Small to Mid- Size Employers

## Key Takeaways

- Policy + training + enforcement = compliance
- Do not adopt policies you will not enforce
- Audit and refresh cycle
- Compliance is about systemization, not perfection
- Train managers, verify understanding, apply consistently
- Policies not enforced are worse than none
- Annual compliance audits are cheaper than litigation

## Best Practice

- Compliance calendar
- Handbook review Jan
- FLSA mid-year
- Training annually
- Multi-state checks as laws change
- Headcount matters

# Employee Experience & Sustainable Growth

## Key Takeaways

- Handbook Audit Checklist
- Review sensitive areas
- Verify multi-state addendums
- Review headcount
- Legal signs off
- Confirm EE understanding
- Confirm EE acknowledgment

## Best Practice

- Job Description Refresh
- Managers submit updates
- HR validates classification ADA
- Schedule meeting with EE
- Review revised JD
- Sign and acknowledge document
- Save in EE file

# Real World Employee Experience Risks

## Case Example: New Policies for Increased Headcount

- *Issue:* Headcount increased to new threshold triggering new federal regulations and policies to be incorporated.
- *Result:* Eligibility and regulatory obligations were misapplied following a headcount increase, causing operational confusion and compliance exposure during onboarding.
- *Analysis:* The organization crossed a regulatory threshold due to headcount growth (e.g., additional federal or state requirements), but HR/ops didn't update policies, systems, or workflows accordingly.
- *Conclusion:* Without a proactive compliance-readiness process tied to headcount milestones, growth amplified risk across onboarding and benefits administration. Standardizing policy updates, automating eligibility rules, and aligning systems would have prevented the missteps and protected both compliance and first-day experience.

# Starting the Journey

## *Recruiting*

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# Strategic Recruitment for Small to Mid- Size Employers

## Challenges

- Rural markets have a smaller talent pool.
- Mismatch is high between candidate expectations and rural reality.
- Small organizations often rely on managers without formal recruiting systems.
- Growth amplifies inconsistency and risk without centralized processes.

## Best practice

- Recruit for fit, not just credentials.
- Move recruiting upstream (urban education centers).
- Build pipelines, not one-off hires.
- Think regionally, not in silos.
- Keep the whole person in mind.

## Healthcare Callout

- Recruiting success is determined more by how well the role, leader, and community are ready to welcome a new hire than by *who* is filling it.

# Recruiting as a Risk Management Strategy

## Best Practice

- Treat recruiting as a structured business process, not an ad hoc managerial activity.
- Design recruiting to reduce single-point role failures.

## Key Takeaways

- Poor hiring practices increase exposure to turnover, misclassification, and employee relations risk down the road.
- Inconsistent hiring processes create immediate legal and equity risk across departments.
- Market forces are leading to horizontal versus vertical job expansion.

## Healthcare Callout

- High-demand clinical roles increase pressure to “hire fast,” raising risk of poor fit and documentation gaps.
- Strategic recruiting builds resilience by ensuring coverage and protecting staff availability.

# Compliance- First Recruiting for 2026

## Best Practice

- Standardize job descriptions and highlight employer benefits on the job posting.
- Hold internal role calibration meetings pre- and post-interviews.
- Structured interviews and scoring rubrics.
- Store materials used for hiring decisions.
- Plan time for credential and background verification collection.

## Key Takeaways

- Compliance risks stem from undocumented decisions, informal screening, and inconsistent criteria.
- Interview questions and selection standards must remain job-related and nondiscriminatory [do not ask questions related to age, race, gender, native language, etc.].
- Documentation is essential for defending hiring decisions.

## Healthcare Callout

- Licensure, credentialing, and union roles require heightened documentation and first day readiness rigor.

# Employee Experience & Sustainable Growth

## Best Practice

- Timely communication to candidates.
- Transparency regarding steps in the recruiting process.
- "Keep them warm" touch points during lengthier searches.
- Clear role expectations and compensation on job postings.
- Still, ask candidates their salary expectations and probe for information on existing competing offers.
- Conduct an employer value proposition review—what does your organization bring to the table that is a differentiator.
- Amplify employee experience narratives on LinkedIn and Indeed.
- Conduct an annual recruiting strategy review.

## Key Takeaways

- Candidate experience directly impacts employer brand and acceptance rates.
- Delayed communication reduces engagement and damages reputation.

## Healthcare Callout

- Workforce shortages make candidate experience a competitive differentiator.

# Real World Employee Experience Risks

## Case Example: Not Setting Expectations at Start of Search Causes Delays

- *Issue:* Organization hires for a technical position without meeting beforehand to align on most relevant skills on the job description.
- *Result:* Ten candidates are invited to phone screen with broader industry experience but missing essential subindustry expertise.
- *Analysis:* Lack of alignment and not configuring knock-out questions in the Applicant Tracking System (ATS) leads to 15 hours of lost productivity.
- *Conclusion:* Not harmonizing viewpoints at front-end regarding job requirements leads to time loss for organizations and job applicants.

# Continuing the Journey

## *Onboarding*

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# Onboarding as a Risk Management Strategy

## Best Practice

- An effective onboarding experiences provides employees both context and direction.
- Treat onboarding as a structured transition, not a one day or even one week orientation.
- Socialization, role specific training, and organizational systems, rules, and safety training should be planned.
- Balance time to productivity with not overwhelming your new hire during their transition.

## Key Takeaways

- Onboarding failures drive early turnover and compliance risk.
- First impressions shape engagement and productivity.
- Most hires know within the first two weeks whether they see a long-term future at their organization.

## Healthcare Callout

- Burnout risk is highest during early employment.
- Clinical onboarding failures impact patient safety and regulatory compliance.

# Compliance- First & Strategic Onboarding for 2026

## Best Practice

- Standardize onboarding checklists:
  - Incorporate team introductions, role training, systems and policy training, and performance check-ins.
- Standardize process for collecting policy acknowledgements.
- Standardize process for required training facilitation and documentation.
- 30/60/90-day plans led by manager.

## Key Takeaways

- Compliance risks arise from missing documentation and inconsistent training.
- Growth increases operational risk without standardized onboarding.

## Healthcare Callout

- HIPAA, safety, and licensure training must be tracked and documented.

# Employee Experience & Sustainable Growth

## Best Practice

- Manager and employee review and sign job description.
- Manager sets regular one-on-one with employee.
- Signal role path progression: plant the seeds for motivation without making promises.
- Standardize check-in questions during one-on-ones: align on priorities, provide real time feedback, and solicit feedback.
- HR/Manager check in at 30/60/90 days to assess performance and ask what tools and resources the employee needs to succeed.

## Key Takeaways

- Managers are responsible for assessing performance and providing employee development architecture.
- Employees are responsible for meeting goals and executing on performance.
- Lack of long-term vision leads to attrition.
- Lack of regular and health communication between employee and manager erodes trust and creates room for disengagement.

## Healthcare Callout

- Employee Career Pathing is a brand differentiator.

# Real World Employee Experience Risks

## Case Example: Missed Health Coverage at Onboarding

- *Issue:* New hire assumes benefits are active; enrollment error delays coverage.
- *Result:* Coverage gap discovered at point of care, out of pocket costs create financial stress and immediate loss of trust.
- *Analysis:* Manual eligibility tracking and internal system misalignment could be at fault.
- *Conclusion:* First impression during onboarding is negative and increased likelihood of early turnover.

# During the Journey

## *Benefits Administration*

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# Benefits Administration as a Risk Management Strategy

## Key Takeaways

- Benefits administration directly impacts compliance, financial exposure, employee retention and workforce stability.
- Administrative errors in eligibility, enrollment timing, or compliance increases the risk of financial penalties, employee claims, or even litigation.
- A proactive benefits strategy that is administered consistently protects the organization, strengthens organizational trust and leadership credibility.

## Best Practice

- Treat benefits as a core compliance function, not an administrative afterthought.
- Align HR, payroll, and benefits systems to reduce manual errors.

## Healthcare Callout

- Unionized or multi-class employee groups require heightened administrative consistency.

# Compliance- First Benefits Design for 2026

## Key Takeaways

- Federal compliance alone is insufficient for multi-state employers.
- The regulatory landscape continues to expand at the state and local level, especially for paid leave, healthcare access, and worker protections.
- Employers must balance federal mandates (ACA, COBRA, ERISA) with state-specific requirements.

## Best Practice

- Maintain clear, written benefits policies that are updated annually.
- Conduct annual benefits audits focusing on:
  - Eligibility definitions
  - Waiting periods
  - Leave coordination
  - Employee communications

## Healthcare Callout

- 24/7 operations and varied employment statuses (full-time, part-time, per diem) require clear eligibility rules.

# Key Considerations for Special States

## Key Takeaways

- Benefits mismanagement during leave is a top driver of employee complaints and litigation.
- Missteps often occur with premium payments, eligibility tracking, and return-to-work coordination.
- Precise coordination of Paid Leave Programs and Employer Benefits is required.
- Train HR teams and managers on job protection, benefits continuation, and reinstatement rules.
- Conduct regular audits of leave and benefits coordination.

# Key Considerations for Special States

## Best Practices by State

### Oregon

- Benefits continuation and reinstatement rules must be clearly documented.

### California

- Coordination between CFRA, FMLA, SDI, PFL, and employer-provided benefits is critical.
- Policies must account for intermittent and overlapping leave types.
- Ensure benefits continuation and reinstatement rules are consistently applied.

### Washington

- Overtime and shift differentials complicate wage calculations for PFML
- Ensure payroll deductions and employer contributions are accurate and timely.

# Strategic Benefits Administration for Small to Mid-Size Employers

## Key Takeaways

- Small businesses face unique challenges: limited HR resources, rapid growth and evolving regulations.
- Scalable benefits administration is critical as headcount grows or becomes more geographically dispersed.
- Steering away from manual process when available helps to reduce errors and compliance risk exposure.

## Best Practices

- Leverage technology or third-party administrators where applicable.
- Clear and standardized processes for things such as benefits eligibility, life events, leave, and termination/cobra coordination supports consistency across locations and departments.

## Healthcare Callout

- Automated enrollment and eligibility tracking is encouraged due to frequent onboarding and turnover rates.

# Employee Experience & Workforce Engagement Through Benefits

## Key Takeaways

- Employees increasingly view benefits as a reflection of organizational values and leadership trust.
- Confusing or inconsistent benefits administration erodes confidence in leadership and employee engagement.
- Ensure managers understand when to escalate benefits questions to HR.

## Best Practices

- Prioritize plain-language benefits communications, clear communication reduces employee relations escalations.
- Offer education during:
  - Open enrollment
  - New hire onboarding
  - Life events and leaves

## Healthcare Callout

- Clinical staff have limited administrative time—benefits communications must be concise and accessible this can help to reduce burnout and absenteeism.

# Real World Employee Experience Risks

## Case Example 1: Payroll Deduction Errors During Paid Leave

- *Issue:* Incorrect benefit deductions during paid leave.
- *Result:* Employee faces coverage gaps or surprise retroactive balances owed upon their return to work.
- *Analysis:* Poor payroll and benefits coordination could be at fault.
- *Conclusion:* Compliance risk increases and perception of being penalized for taking protected leave.

# Preparing for Sustainable Growth in 2026

## Key Takeaways

- Strong benefits administration supports scalability, compliance, and workforce trust.
- Benefits strategy and administration should evolve alongside organizational growth.
- Employers that invest now with proactive planning reduce future operational disruption and compliance exposure.

## Best Practice

- Review benefits strategy annually with a focus on:
  - Regulatory changes
  - Workforce demographics
  - Administrative capacity
- Partner with trusted advisors to stay ahead of compliance changes.

## Healthcare Callout

- Competitive, compliant benefits administration supports recruitment and continuity of care.

# Ending The Journey

## *Offboarding*

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# Offboarding as a Risk Management and Legacy Strategy

## Best Practice

- Treat offboarding as a controlled operational process.
- Leave the departing employee with a positive image of the organization.
- For high performers, leaving the door open for a potential return at a future time.

## Key Takeaways

- Most legal and operational risk occurs at separation.
- Poor exits increase litigation, data, and reputational risk.
- A positive experience leads to a lasting positive impression.

## Healthcare Callout

- Patient data and system access create elevated risk.
- Boomerang employment rates (rehires) have increased since the Great Resignation (2022).

# Compliance- First & Strategic Offboarding for 2026

## Best Practice

- Maintaining dignity of employees [when terminated].
- Final paycheck protocols.
- COBRA coordination.
- Access termination.
- Exit interviews and knowledge transfer.

## Key Takeaways

- Final pay, benefits continuation, and documentation are high-risk areas.
- Inconsistent separations increase liability and reduce the likelihood of contingency plans that might limit staff exposure.

## Healthcare Callout

- Consistent exits protect compliance and continuity of care.

# You Arrived to your Destination

## Compliance

Most HR pain and legal exposure come from weak or outdated policies, unclear role expectations, and inconsistent practices. Getting the foundation right drives consistency, protects the organization, and supports a smoother employee journey.

## Benefits

Think of benefits administrations as an investment opportunity, not an administrative burden. Strong benefits administration protects operations, mitigates risk, supports employee engagement, and enables growth to create a more engaged and resilient workforce.

## Recruitment & On/Off Boarding

Recruiting and onboarding function as risk prevention by prioritizing fit, clarity, and support. When approached strategically, they reduce single-point failures, help integration, and stabilize coverage so organizations maintain continuity and engagement through accelerating workforce change.

# Questions?

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# ORH Announcements

- **Next ORH Community Conversations**
  - **March 19** at 12 p.m. | Rural Health Transformation Program Updates | ([Register here](#))
  - **May 21** at 12 p.m. | Communities Recruiting Providers | ([Register here](#))
- **ORH Policy Updates**
  - **March 13** at 12 p.m. ([Register here](#))
- **May 14-15, 2026 Virtual | 3<sup>rd</sup> Annual Forum on Rural Population Health**  
([More information here](#))
- **Oct. 7-9, Bend, OR | 43rd Annual Oregon Rural Health Conference**  
([More information here](#))

# Thank you!

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