

NEW PHYSICIAN ONBOARDING CHECKLIST

Use this checklist to manage the orientation and onboarding activities for each new physician you hire. Ask for regular status updates - especially about the credentialing process. Items listed in each section are not necessarily in chronological order.

Item	Responsible Person	Deadline	Date Completed	Status Update/Notes
Licensing & Credentialing <i>(Begin this process 6 months before the new physician's start date.)</i>				
Obtain state medical license number				
Obtain National Provider Identification (NPI)				
Obtain DEA license				
Obtain Controlled Substance Certificate				
Obtain Medicare number				
Complete malpractice application				
Apply for hospital privileges				
Apply for ASC privileges				
Obtain Medicaid number				
Credential on all insurance plans				
Materials Management				
Determine if new medical or surgical equipment is needed - price shop and purchase				
Purchase new computer/laptop or other office equipment				
Provide office supplies				
Arrange for Rx and physical therapy prescription pads				
Order name plate(s) and name tags				
Order signature stamp				
Purchase lab coats				

Item	Responsible Person	Deadline	Date Completed	Status Update/Notes
Business Administration				
Execute and file physician contract				
Review group by-laws and "rights and responsibilities"				
Provide hospital by-laws and rules				
Lead an office tour				
Arrange for a hospital tour(s) with hospital leadership				
Arrange for an ASC tour				
Facilitate staff introductions and schedule time for physician to spend with key employees				
Add Dr. New to the call schedule				
Determine office schedule				
Determine surgery schedule and block times				
Determine surgery schedule and block times				
Meet with practice manager at least once (ideally more than once), to discuss business goals and operations, major projects and implementations, compensation formula, and reports the new physician will receive				
Discuss the practice's coding and documentation process, turnaround times, and expectations				
Review the practice's social media policy				
Review financial policy, fee schedule, and collection procedures				
Provide an overview of key technologies beyond EHR and PMS - Ex: patient portal, appointment reminders, cost estimators, patient engagement/follow up systems				
Observe front desk operations, including appointment scheduling, check-in, and check-out				

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Observe surgery scheduling process				
Work with surgery scheduler to develop "quick pick" lists of common CPT and ICD-10 codes for the new physician's procedures - use to customize Surgery Cost Quotes and other forms				
Observe/learn patient process and revenue cycle basics with the billing team, including claims submission and follow up				
Educate the new physician about other physicians and medical resources in the community				
Apply for membership in appropriate local, state, and national societies				
Human Resources				
Provide personnel policy manual				
Apply for insurance benefits				
Review retirement plan				
Complete state/other tax forms				
Complete the I-9				
Verify TB test				
Verify Hepatitis B vaccination				
Arrange for and provide cell phone				
Provide keys				
Arrange for parking space				
Order parking space sign, if needed				
Update contact information sheets and provide copy to Dr. New				



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IT Setup				
Create email address				
Set up PMS and EHR login credentials				
Develop scheduling templates				
Develop EHR visit templates				
Set up remote access and verify HIPAA compliance of home office environment				
Set up voice mailbox				
Provide building security codes				
Training				
Practice EHR				
Hospital EHR				
PACS				
Dictation system				
Hospital Web portal/access				
Telephone system				
Dictation system				
HIPAA				
Billing/coding (forms, processes, expectations)				
AAOS coding and reimbursement workshop				
OSHA				
Marketing				
Order business cards				
Order business stationary				
Design and print announcement cards				
Order appointment cards				
Add name on all signage				



Item	Responsible Person	Deadline	Date Completed	Status Update/Notes
Hang physician photo in lobby				
Arrange for diplomas to be framed and hung				
Schedule a photo shoot for head shot				
Consider engaging an external marketing plan for public relations activities				
Add bio and photo to Web site physician page				
Create Web site home page announcement				
Develop and launch a social media announcement campaign				
Ask the new physician to record a 1 minute or less video introduction; post to social media and Web site				
Update the new physician's profile on all online rating sites				
Record announcement, details on telephone "hold button"				
Submit a story to the local newspaper				
Send out a patient/community mailing				
Contact referring physicians				
Schedule and hold an open house				
Create a plan for speaking engagements				
Create a plan for referring practice "meet and greets"				
Update all online listings and print advertisements				

