



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 | | | | |



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| 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 | | | | |
| 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 | | | | |



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| Observe front desk operations, including appointment scheduling, check-in, and check-out | | | | |
| 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 | | | | |



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| Update contact information sheets and provide copy to Dr. New | | | | |
| 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 | | | | |



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| Order business stationary | | | | |
| Design and print announcement cards | | | | |
| Order appointment cards | | | | |
| Add name on all signage | | | | |
| 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 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" | | | | |



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| Update the practice's Yellow Page listing with the new physician's name (in most markets these days, this is an online listing - not a phone book) | | | | |