

## NEW PROVIDER ORIENTATION CHECKLIST\*

Adapt and modify to suit your needs.

PROVIDER NAME: \_\_\_\_\_  MD  DO  PA  NP

PROVIDER SPECIALTY: \_\_\_\_\_

ANTICIPATED START DATE: \_\_\_\_\_

ORIENTATION: \_\_\_\_\_

PATIENTS: \_\_\_\_\_

CLINIC LOCATIONS:  A \_\_\_\_\_  B \_\_\_\_\_  C \_\_\_\_\_  D \_\_\_\_\_

(Check primary location)

TEAM ASSIGNMENT: \_\_\_\_\_

Task description	Party responsible	Date completed	Notes/comments
<b>PHYSICIAN SERVICES</b>			
Return employment agreement to physician			
Process signing bonus/ promissory note			
Return employment agreement to physician			
Send welcome letter to physician			
Initiate internal announcements providing notification of new provider			
Notify department chair (hospital)			
Notify credentialing			
Notify credentialing coordinator (hospital)			
Initiate relocation assistance to provider(if needed)			

<b>Task description</b>	<b>Party responsible</b>	<b>Date completed</b>	<b>Notes/comments</b>
Notify Human Resources			
Send copy of employment agreement to finance department			
Prepare press announcement for external/internal purpose			
Create hospital newsletter announcements			
Send welcome letter to new physician and family from clinic staff with photo of clinic and staff			
Post website page announcement			
Make photo arrangements			
Develop provider profile			
Distribute press release and internal communications			
Order lobby signs with new provider information			
Notify and assign mentors (if applicable)			
Schedule pre-employment physical			
Schedule orientation time; develop and distribute orientation schedule			
Arrange for welcome gift at physician office on start date; also send a welcome gift at physician home for family			
Give copy of first- and second-week schedule to physician			
Host welcome reception (provide cake or other refreshments)			

<b>Task description</b>	<b>Party responsible</b>	<b>Date completed</b>	<b>Notes/comments</b>
<b>CREDENTIALING</b>			
Initiate licensure/DEA application process (if needed)			
Meet with new provider to complete third-party payer applications			
Notify malpractice			
Notify hospital to send credentialing application			
Process third-party payer applications			
Set up accounts for billing			
Notify electronic billing vendor			
Follow up on all hospital and third-party payer applications			
<b>HUMAN RESOURCES</b>			
Complete I-9, W-4, benefit enrollment forms, security			
Salary/Payroll — Establish draw amount, bonus, taxes, etc.			
Complete HR benefits review			
Do confidentiality agreement (done at orientation)			
Assign name/security badge			
<b>CLINIC MANAGER/NURSE</b>			
Assign medical asst.			
Assign rooms			
Assign work station			
Determine office hours			

<b>Task description</b>	<b>Party responsible</b>	<b>Date completed</b>	<b>Notes/comments</b>
Order lab coats			
Order Dictaphone			
Order business cards			
Revise letterhead			
Orient to HIPPA			
Order RX pads			
<b>INFORMATION SERVICES</b>			
Develop schedule template (include staffing needs, scheduling preferences reviewed with provider)			
Enter master schedule			
Assign provider schedule			
Order paper/ Assign paper number			
Complete answering service provider form			
Notified answering service			
Install/change signage (front lobby, rooms, wall)			
Assign voice mail, number			
Assign email name			
Install computer			

*(Keep in mind that activities vary greatly depending on the type and structure of your clinic. Please modify based on the needs of your clinic.)*

\*Adapted from the Michigan Center for Rural Health Orientation/Onboarding Samples, included in the Midwest Retention Toolkit, 2012.

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