

NEW PROVIDER PRE-ORIENTATION CHECKLIST STEP ONE

PROVIDER NAME: _____ **MD DO PA NP**
(First Middle Last)

PROVIDER SPECIALTY: _____

ANTICIPATED START DATE: _____ **ORIENTATION:** _____ **PATIENTS:** _____

CLINIC LOCATIONS: ___A___B___C___D___F___
(Check Primary Location)

Task Description	Party Responsible	Date Completed	Notes/comments
<u>PHYSICIAN SERVICES</u>			
Return employment agreement to physician	_____	_____	_____
Process signing bonus/promissory note	_____	_____	_____
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)	_____	_____	_____

Task Description	Party Responsible	Date Completed	Notes/comments
Arrange pre-employment visit	_____	_____	_____
Notify human resources	_____	_____	_____
Copy of employment agreement to finance	_____	_____	_____
Prepare press announcement	_____	_____	_____
Hospital newsletter announcements	_____	_____	_____
Welcome letter to new physician and family from clinic staff with photo of clinic and staff	_____	_____	_____
Website page announcement	_____	_____	_____
Photo arrangements	_____	_____	_____
Develop provider profile	_____	_____	_____
Develop new provider marketing strategy, ads, letters, etc.	_____	_____	_____
Develop and distribute press release	_____	_____	_____
Order lobby signs	_____	_____	_____
Mentor(s) notified and assigned (if applicable)	_____	_____	_____
Schedule pre-employment physical	_____	_____	_____
Schedule hospital orientation time develop and distribute orientation schedule	_____	_____	_____

Task Description	Party Responsible	Date Completed	Notes/comments
Arrange for welcome gift at physician office on start date also at physician home for family	_____	_____	_____
Copy of first and second week schedule to physician	_____	_____	_____
Welcome reception (Orientation) order welcome cake	_____	_____	_____
<u>CREDENTIALING</u>			
Initiate licensure/DEA application processes (if needed)	_____	_____	_____
Meet with new provider to complete 3 rd party payer applications	_____	_____	_____
Notify malpractice	_____	_____	_____
Notify hospital to send credentialing application	_____	_____	_____
Process 3 rd party payor applications	_____	_____	_____
Set-up Accounts for Billing	_____	_____	_____
Electronic billing vendor notified	_____	_____	_____
Follow-up on all hospital and 3 rd party payor application issues	_____	_____	_____
<u>HUMAN RESOURCES</u>			
I-9, W-4, benefit enrollment forms, security badge	_____	_____	_____
Salary/Payroll- draw amount, bonus, taxes, etc.	_____	_____	_____
HR benefits review	_____	_____	_____

Task Description	Party Responsible	Date Completed	Notes/comments
Confidentiality agreement (done at orientation)	_____	_____	_____
Name/Security badge	_____	_____	_____
State/County Medical Society	_____	_____	_____
<u>CLINIC MANAGER/NURSE</u>			
Medical assistant assigned	_____	_____	_____
Rooms assigned	_____	_____	_____
Work station assigned	_____	_____	_____
Determine office hour's	_____	_____	_____
Lab coats ordered	_____	_____	_____
Dictaphone ordered	_____	_____	_____
Business cards ordered	_____	_____	_____
Revise letterhead	_____	_____	_____
HIPPA orientation	_____	_____	_____
Order RX pads	_____	_____	_____
<u>COMMUNICATION CENTER</u>			
Schedule template developed (Staffing needs, scheduling preferences reviewed with provider)	_____	_____	_____
Master schedule entered	_____	_____	_____
Assign provider schedule name	_____	_____	_____
Paper ordered/paper number assigned	_____	_____	_____
Complete answering service provider form	_____	_____	_____
Notified answering service	_____	_____	_____

Task Description

Party Responsible

Date Completed

Notes/comments

Install/Change signage
(front lobby, rooms, wall
plates, etc.)

INFORMATION SERVICES

Voice mail assigned number
assigned

Email name assigned

Computer installed

(Activities vary—these are suggestions)

Don't forget to "Check-In"