



MedTrainer

CHECKLIST

# Healthcare Onboarding

Steps to Develop Employees Who Stay



# First Impressions Matter

Onboarding and credentialing a new employee should be treated as an extension of the recruiting process.

Use this checklist to ensure your onboarding process is designed to rapidly integrate new hires. While not all of these items may apply to your facility, this is the beginning of improvements to your onboarding process.



## When New Hire Accepts the Offer:

- Send a greeting to your new hire! Ideas: emails from team members, a welcome video highlighting the organization's culture, or a card in the mail
- Tell your new hire what to expect from the onboarding process, including a timeline and schedule for their first few days or weeks
- Send a small gift or swag bag to welcome them to the organization
- Request all documents needed for credentialing and set reminders to send until received
- Check for licenses and national certification status (if applicable)
- Complete background checks (criminal, education, employment, DHS E-Verify) and file results
- Complete a drug screen, physical exam (if required), and review health history to include any vaccination requirements, then document
- Obtain DEA certificate and file documentation
- Document the collaborating or supervising physician and/or practice agreement (where applicable)
- Obtain Medicaid/Medicare provider numbers if applicable
- Ensure malpractice/liability coverage, if applicable
- If you offer online compliance training, send a link to get a head start
- Send HR paperwork (I-9, W-4, etc.)

## Ongoing Prior to Start:

- Apply for privileging
- Complete and submit payer enrollment forms
- Manage follow-up for all credentialing items
- Check in with new hire to update on progress and share your excitement

## On the New Hire's First Day:

- Give your new hire a facility orientation
  - Show them around and point out key areas
  - Explain emergency procedures and duties, including emergency codes
  - Enroll your new staff member in facility-based emergency notification system, if needed
  - Explain safety incident/near miss response and reporting requirements
- Review facility mission, vision, and values
- Share all policies, procedures, and plans that will need to be acknowledged and give the new hire time to thoroughly review
- Provide building access and badging
- Give your new hire parking permits, if applicable
- IT/EHR account setup, passwords, and training (if not already completed)
- Complete fit-testing and issue PPE or other special equipment required
- Review telehealth policies and procedures
- Provide clinical decision support resource tools

# Department or Unit-Specific Orientation

- Introduce the new hire to their “coaches” or mentors who will provide ongoing support and training during their initial months on the job; set a schedule
- Encourage team members to have coffee or spend one-on-one time with the new hire
- Talk to the new hire about how their specific job relates to the organization’s mission, vision, and values
- Share quotes or stories from employees showing how their role contributes to the overall mission
- Give safety orientation, with training on workplace safety and workplace violence
- Explain lab and blood product procedures
- Provide clinical decision support resource tools
- Review medication administration and access to pharmaceutical storage carts (Pharmacy Rx, reorders, standing orders)
- Provide an orientation to communication systems (electronic, telephonic, paging, signage, and any telehealth procedures)
- Review management/chain of command, staffing model, and ancillary staff roles supporting the unit
- Set the stage for growth by sharing opportunities for advancement or professional development at your facility, including rotational assignments, cross-training, or other options
- Review record keeping/progress notes (hard copy charting as contingency/EMR downtime procedure)
- Review the compliance platform and how to access manufacturer’s instructions, safety data sheets, and policies
- Explain hand-off/change of shift protocols, daily rounding practice/composition
- Make sure the new hire is introduced at an all-hands or team meeting and manager makes an effort to make the new hire feel welcome

# After Initial Orientation is Complete (1-3 Months Post-Hire):

- Ask your new hire to complete an onboarding survey or questionnaire to find out what was helpful and what can be improved
- Have a leader take your new hire out to lunch or coffee
- Check-in to see what your new hire needs help with
- Make sure all required training has been completed
- Start an individualized plan for career development in consultation with the employee and their manager, which might include additional training or special responsibilities

## Ready to streamline your new hire onboarding process? Use MedTrainer to:

- ✔ Automate credentialing document requests
- ✔ Assign all training courses at one time
- ✔ Assign all documents and policies for review at one time

[Learn more](#)

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