

Clinic Manager Checklist for Onboarding a New Provider

Begin process 3 months prior to new physician start date

- Business cards ordered
- Lab coats ordered
- Order laptop, phone or other office equipment (dictaphone/dragon?)
- Order name plates for office and clinic
- Order requested office supplies
- Order Rx pads, if necessary
- Add new physician to call schedule, if applicable

Meet with Physician for the following:

- Determine medical/surgical equipment needs and purchase if necessary
- Determine office schedule and appointment templates
- Determine surgery schedule and block times
- Develop surgery preference cards for OR
- Develop "quick pick" list of common CPT and ICD-10 codes for procedures
- Review surgery scheduling form and others used in clinic and adjust if needed
- Meet with clinic manager to discuss business goals, operations and reports new physician will receive

Begin process 1 month prior to new physician start date

- Inform staff of new physician start date
- Send welcome letter from team
- Medical assistant assigned or start hiring process for support
- Rooms assigned

- Work station assigned
- Update contact sheet with new physician info and give to new provider
- Order marketing material that will be sent out with bio and picture to have in clinic
- Revise letterhead
- Put together orientation agenda for first 30 days and set up meetings with key employees/groups
- Determine who will perform orientation, e.g., another physician, nurse, administrator
- Confirm Organization orientation
- Confirm Hospital orientation
- Have staff start scheduling patients with new provider as determined by template and ramp-up plan
- Add name on all signage for clinic
- Order keys
- Notify answering service and complete needed forms
- Record announcement, details on telephone "hold button"
- Arrange for parking space and sign if needed
- Arrange for welcome gift at physician office on start date as well as at physician home

The first week

- Hang physician photo in clinic (if applicable)
- Arrange for diplomas to be framed and hung
- Review all checklists with corresponding departments
- Follow up on outstandings