PHASE 1
After Offer Acceptance-Administrative
- Review providers’ experience and skill set
- Check licenses and national certification status (as applicable for role and level of hire)
- Collect copy of candidate degree/transcript (where applicable for level of hire)
- Process background checks (criminal, education, employment, Department of Homeland Security (DHS) E-Verify)
- Process drug screen and physical examination (if required) and review health history to include required inoculation/prophylaxis
- Review references
- Obtain Drug Enforcement Administration certificate if applicable
- Apply for hospital privileges
- Review employee handbook (compliance, human resources policies, etc.)
- Complete Form I-9
- Complete Form W-4
- Enroll in direct deposit
- Provide personal contact information for emergency call list/tree and any role-dependent notification systems
- Review and select available benefits
- Review employee assistance program and other support resources
- Obtain parking permit/transit subsidy

PHASE 2
Hospital/Facility Orientation
Assist new hire with:
- Completing new hire hospital/facility provider orientation including:
  - Training on emergency procedures and responsibilities, including emergency codes
  - Enrolling in hospital/facility-based notification system (if used)
  - Reviewing safety incident/near miss response and reporting requirements
  - Reviewing key facility locations (e.g., locker rooms, safe rooms, pharmacy, emergency department, cafeteria, lab, blood bank, etc.), access, egress
- Reviewing hospital/facility mission, quality improvement initiatives, ethics, and Health Insurance Portability and Accountability Act standards
- Documenting collaborating/supervising physician and/or practice agreement (where applicable)
- Obtaining Medicaid/Medicare provider numbers
- Credentialing on all insurance plans
- Ensuring malpractice/liability coverage
- Providing identification/badging to ensure building/unit access
- Setting up information technology and electronic health record accounts, passwords, remote access, and trainings (where applicable)
- Completing fit-testing; issue personal protective equipment (PPE) and/or other special equipment required

PHASE 3
Department/Unit Specific Orientation
- Provide safety orientation to the unit (exits, fire extinguishers, etc.)
- Verify unit-specific clinical competencies
  - Just-in-time skills training
  - Unit code response expectations
  - Care orders/processes (including palliative)
- Provide clinical decision support resource tools as needed
- Orient to equipment (intravenous machines, enteral feeding, ventilators)
- Review lab and blood product procedures
- Review medication administration and provide access to pharmaceutical dispensing systems (prescriptions, reorders, standing orders)
- Orient 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
- Review PPE procedures specific to unit, including donning/doffing
- Explain hand-off/change of shift protocols, daily rounding practice/composition
- Review record keeping/progress notes (hard copy charting as contingency/electronic health record downtime procedure)
- Use “buddy system” assignments
  - Ensure new staff member schedule mirrors mentor or core mentor group to allow mentor rotation and prevent burnout

ASPR TRACIE updated this document in 2023 to be applicable to any incident requiring surge staffing. ASPR TRACIE acknowledges the following Subject Matter Experts who contributed to this document: CAPT Renee Joskow, DDS, MPH, FAGD, FACD, FICD and Mary E. Mather, MSN, RN, CNL, NEA-BC, VHA-CM, who also originally authored this document for use during the COVID-19 pandemic; John Hick, MD, Hennepin Healthcare; and Mark Jarrett, MD, MBA, MS, Northwell Health.