Health Care Facility Onboarding Checklist

Hospitals and other health care facilities face significant challenges to quickly onboard additional health care providers when admissions and Intensive Care Unit (ICU) occupancy increase rapidly. Surge staffing may be needed to support natural disaster response, public health emergencies (including infectious disease outbreaks or pandemics), and acute staffing shortages. This Onboarding Checklist is a tool that can help hospitals and other facilities streamline staff acquisition and the onboarding process in times of need.

A checklist may help frame and expedite the onboarding process and can ensure new employees complete administrative requirements; become familiar with the mission, overall goals, and organizational culture of the facility; and are oriented to expectations for the department or unit assignment. This checklist uses a three-phase approach and includes links to helpful related online resources. It can be used as a resource for entities to develop more detailed facility- and health care system-specific processes. Note: While outside the scope of this checklist, health care facilities should also have a rapid offboarding process in place to protect patient safety and systems and facility security.

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