MEDICAL PRACTICE STAFF ONBOARDING CHECKLIST

ORIENTATION TO THE PRACTICE

- Overview of the practice's mission, values and goals
- Introduction to the practice's policies and procedures
- Organization structure along with roles and responsibilities of each team member
- Review daily operations and flow of patients in the practice
- Tour of the practice facility
- Employee ID

COMPLIANCE TRAINING

- HIPAA regulations and patient privacy laws
- Occupational Safety and Health Administration (OSHA) requirements
- Fraud, Waste and Abuse training
- Bloodborne Pathogens training

ELECTRONIC HEALTH RECORD (EHR) TRAINING

- Navigation of the EHR system
- Scheduling appointments and managing patient records
- Entering and verifying patient information
- How to document patient encounters
- Familiarization with medical documentation and charting (role dependent)

CUSTOMER SERVICE TRAINING

- Best practices for patient communication and customer service
- Conflict resolution and handling difficult patients
- Professionalism and maintaining a positive image for the practice

MEDICAL TERMINOLOGY TRAINING

- Understanding basic medical terms, abbreviations and symbols used in the medical practice
- Terminology specific to each medical specialty and department

INSURANCE AND BILLING TRAINING

- Verification of insurance coverage and benefits
- Understanding of different insurance plans, copays and deductibles
- Processing claims and handling patient payments

CLINICAL TRAINING (FOR CLINICAL STAFF)

- Understanding of basic clinical procedures and protocols
- Training on equipment and supplies used in patient care
- Hands-on practice and simulation training as available

EMERGENCY AND DISASTER TRAINING

- Fire safety and emergency response procedures
- Basic life support (BLS) and cardiopulmonary resuscitation (CPR) training
- Preparation for natural disasters and other emergencies

PROFESSIONAL DEVELOPMENT

- Continuing education opportunities and requirements
- Opportunities for advancement within the practice and career development
- Professional networking and collaboration opportunities

REVIEW OF EMPLOYEE BENEFITS AND POLICIES

- Introduction to employee benefits, such as health insurance and retirement plans
- Overview of employee policies, such as time off and sick leave policies
- Explanation of employee conduct and performance expectations, including the practice's code of ethics and conduct guidelines

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NEW STAFF ORIENTATION TIMELINE (EXAMPLE)

PREPARATION BEFORE THE FIRST DAY:

- Send welcome email to new employee with details about their start date, time, location, dress code, parking and anything else they need to know.
- Send any necessary paperwork, including employment agreement, benefits information, and other HR forms electronically (if possible).
- Ensure work area is set up and ready, including computer, phone, email, and software systems with appropriate permissions and access.

FIRST DAY:

- Meet with HR representative to complete paperwork, review benefits and policies, get employee ID and answer any questions.
- Provide a tour of the office, including the front desk, exam rooms, and break room.
- Introduce the new employee to their supervisor and team members.
- Review the job description and performance expectations.
- Review the schedule for the first week, including training sessions and any meetings.

FIRST WEEK:

- Schedule training sessions for EHR, appointment scheduling, insurance verification, billing, HIPAA compliance, and office procedures.
- Provide training on medical terminology used in the clinic, customer service, patient engagement, and teamwork and communication.
- Review the office emergency procedures and safety protocols.
- Schedule a meeting with the provider(s) to introduce the new employee and review their role in patient care.

FIRST MONTH:

- Conduct regular check-ins with the new employee to answer any questions and ensure they have the support they need.
- Review performance expectations and provide feedback on progress.
- Encourage participation in team meetings and other office events.
- Schedule additional training sessions as needed.

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