

NEW PHYSICIAN ORIENTATION – CHECKLIST

A. Prior to Start Date (By Responsible Party)

Director of Physician Recruitment & Retention (in addition to standard recruitment agenda)

- Inform Medical Staff/Peer Review Coordinator and Director of Managed Care that new physician has signed contract for credentialing and contracting purposes
- Inform checklist participants that new physician has signed contract and remind them to address items under "Prior to Arrival" section of the checklist as appropriate. Include start date and identify appropriate checklist to utilize
- Assignment of Physician Preceptor (Vice Chair of Medical Staff Department when others unavailable) and follow-up to ensure preceptor has scheduled time with new physician. (Consider whether new physician needs orientation to supervision of mid-level providers and assign preceptor accordingly OR set up separate interview with experienced mid-level supervising physician)
- Assign community sponsors and facilitate time for them to meet physician and spouse, as appropriate
- Provide community information pertinent to physician/family interests (ongoing as needed)
- Coordinate with Marketing Staff on announcing arrival of new physician (see various Marketing components of worksheet)
- * Schedule first-week meetings with leaders and/or coordinators for the following departments/functions (as appropriate to physician's needs):
 - Marketing
 - Medical Records
 - Laboratory
 - Imaging
 - Respiratory, Cardiopulmonary and Neurology Services
 - Centralized Scheduling
 - Managed Care/PHO
 - Pharmacy
 - House Rules and Small Community Hospital Attributes
 - Outreach Clinics
 - Occupational Health
 - Nutritional Counseling

- Rehab Services
- Cardiac Rehab
- Nursery
- Women's Services
- Peds/Ortho

- VP, Support Services
- Medical Staff Services

- Risk Management, Case Management, Utilization Management, & Regulatory Affairs ,Clinical Documentation Management Program
- Performance Improvement/Peer Review
- Surgical Orientation
- Emergency Center
- Director, Information Systems
- Customer Relations
- Progressive Medical Care Services
- Critical Care Services
- IP Rehab
- Hospice
- VP, Finance
- Clinical Educator
- Physician Recruitment and Marketing
- Department Chairman
- VP, Operations
- President/CEO

- Assess if need for keys to be distributed prior to orientation appointment with Medical Staff Coordinator.
- Order pager, cell
- Provide physician with Physician Orientation Manual (include physician directory, associate directory, information about local events/restaurants)
- Encourage Chief of Medical Staff to assign immediate participation on committees
- E-Mail staff to inform them of physician name, specialty, and start date.
- Notify the Director of Information Systems of each new physician's start date, practice location, phone number, and beeper number so that he may share with the operators and other appropriate staff

- Notify the rest of the Leadership Team of each new physician's start date, practice location, phone number, and beeper number
- Call local hospitals to get their latest referral directories and distribute to new physician(s)
- Arrange for a sign-on check and promissory note, if applicable.
- Ensure hospital/practice agreement letter and promissory notes, finalized, if applicable

Physician's Receptionist or Office Manager (Outpatient Clinic Staff, if necessary)

- Schedule initial appointments for new practice prior to actual start date (physician/consultant to advise Director of Physician Recruitment and Retention and Marketing Department as to timing)

* **Physician's office manager**

- Assure applications for State medical license and for UPIN, DEA, Medicare, Blue Cross numbers, etc., are underway/complete. Once numbers received, share with Hospital's Medical Staff/Peer Review Coordinator
- Complete tasks on individualized practice set-up checklist (attached) to include communication of UPIN numbers to Director of Physician Recruitment & Retention
- Apply for privilege license for physician
- Advise Director of Physician Recruitment and Retention and Marketing Department of date appointments will start being scheduled

Medical Staff Coordinator

- Provide physician with Medical Staff Application to new physician upon notification from Director of Physician Recruitment and Retention of receipt of signed contract
- Complete process for credentialing and medical staff privileges
- Communication of medical license number(s), UPIN number, and DEA to Medical Records once received from physician with their application. If any numbers not received on application, request in follow-up letter
- Remind Medical Records to assign physician ID number
- Review chain of command for Medical Staff

- Provide physician with Medical Staff Calendar/Committee roster and review
 - Check with the VP of Finance to determine if new physician will need a hospital provider number, and complete provider number application, if appropriate.
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Marketing Coordinator

- Plan announcement in Business section of local newspaper(s)
- Plan print and radio advertising
- Plan exposure in the newsletter
- Plan inclusion in next update of Physician's Directory, or flyer until new update ready for distribution
- Update Hospital promotional materials regarding any new services being added
- Provide a copy of the Office Manager's Manual to the new physician's office manager/consultant

Marketing Representative

- Arrange tours of business and industry specific to specialty, as desired by physician and appropriate to specialty (may take place before and/or after start date)
- Encourage participation in Speakers Bureau, Just a Talk, Community Health Night Out, Screening, and other activities to market physician's practice
- As appropriate, schedule visits to meet referring physicians

Managed Care Coordinator

- Work with physician and/or physician's consultant and practice manager to ensure physician is credentialed for managed care contracts and the PHO

Clinical Educator

- Assess educational needs for staff, especially as related to a new service

B. First Week of Practice (By Responsible Party)

Director of Physician Recruitment & Retention

- First-Day Welcome Breakfast
- First-Day Tour (checklist attached) and scheduled appointments, to include receipt of ID badge from Human Resources and beeper
- Provide physician with cafeteria charge account information and forms
- Follow-up to assure first-week orientation appointments with various departments completed (appointments may be scheduled prior to start date, if preferred by physician)
- Collect completed orientation checklists to file in physicians' folder

Medical Staff

- Provide keys for SMH mail room(s), lounge, physician entrance, and/or changing rooms in OR, as needs dictate
- Ensure physician receives current Hospital calendar, committee roster, call schedule, and notice of next Medical Staff meeting date

Physician Preceptor

- Provide one-on-one orientation based on needs of new physician (Director of Physician Recruitment & Retention to provide confirmation letter and list, which is attached)

VP of Operations

- Ensure disaster plan information is communicated to physician during orientation.

Clinical Educator

- Implementation of new programs (such as Pain Management)

C. Miscellaneous - Timing as Appropriate

Director of Physician Recruitment & Retention

- Schedule breakfast meeting with *President/CEO and Chief of Medical Staff* for overview of Health System, mission, governance, strategic plans, etc.
- Plan Open Houses at Physicians' offices, as appropriate, during first few months of practice
- Regular contact with new physician & spouse/significant other to obtain feedback, assess needs, etc. Communicate any concerns to CEO
- Obtain evaluation/critique of Orientation Process after first few months of practice
- Consult with VP of Finance regarding need and timing of practice audit after 3 months. Arrange for audit, if indicated
- Notify Newcomers Club of new physicians' addresses, so they may be included in annual August tea for new members
- Order flowers/plant for new physician to be delivered at their home after they have relocated

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