

**Mike Delmonico Consulting, LLC** <sup>TM</sup>  
**Provider Recruitment and On Boarding Checklist**

Provider's Name: \_\_\_\_\_ Last Updated: \_\_\_\_\_

<u>Item</u>	<u>Responsible Team / Person</u>	<u>Notes / Status</u>
<b>Pre-Recruitment</b>		
Recruitment Need Identified		
Position Recruitment Approved		
Business Plan and Pro Forma Developed		
Determine Practice Location(s)		
<b>Recruitment</b>		
Job Postings, Advertisements, Sourcing Tactics		
Candidate Name and Referral Source Cleared		
Screen Submitted Applications and CVs		
Candidate Application in HRIS		
Schedule Initial Telephone Introductions/Screening		
Schedule Site Visit, Facility Tours, Community Tour, and In-person Interviews		
Candidate's Post-Visit Feedback		
Reviewers' Post-Visit Feedback		
Decide on Employment Offer or Pass on Candidate		
<b>Employment Offer and Contracting</b>		
Develop Employment Offer		
Employment Offer Approved		
Offer Discussed/Negotiated with Candidate		
Confirm Assignments and Schedules		
Confirm Practice Locations		
Confirm Equipment and Supply Needs		
Confirm Relocation Considerations		
Confirm Immigration Considerations		
Establish Target Start Date		
<b>Post-Offer Acceptance and Contracting</b>		
Draft Employment Agreement		
Send 2 Copies Employment Agreement to Candidate		
Candidate Returns 2 Signed Copies of Agreement		
Employment Agreement Counter Signed		
Send Fully Executed Agreement, Medical Staff Application, and Payer Applications to Candidate		
Notification of Executed Employment Agreement Circulated to Human Resources, Accounting and Finance, Medical Staff Office, Payer Credentialing Manager, Practice Manager, Malpractice Insurance		

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Coordinator, Public Relations and Marketing Team, and Hospital Administration		
Copies of Executed Contract to Human Resources, Finance, Malpractice Insurance, and Administration		
Facilitate Securing of Medical License, DEA, and Controlled Substances documents; Secure Education, Work, and Practitioner Data Base Verifications; Secure Professional References and Claims History; Schedule Medical Staff Orientation; Schedule Occupational Health Clearance; Initial IT Access, E-Mail Address, and IS Training; grant Medical Staff Privileges.		
Payer Credentialing Applications, Linking to Practice Locations, Notify Central Billing and Practice Manager of Effective Dates		
Human Resources Paperwork, Payroll Withholdings, Direct Deposit, Benefits Selections, and Schedule Orientation Date		
Establish Cost Centers, Budgets, and Payroll System Set Up		
Photograph, Internal Announcements, Web Site and Social Media Content, and Advertisements		
Facilitate Completion of Malpractice Insurance Application with Candidate		
Update Intranet Directories		
Sign On Bonus Payment(s)		
Recruitment Fee Payment(s)		
<b>Review of Key Applications and Credentials</b>		
Complete/Confirm FCVS Registration		
Complete/Confirm CAQH Registration		
Complete/Confirm NPI Number		
Complete/Return Medical Staff Application		
Complete/Return Malpractice Insurance Application		
Complete/Submit State Medical License App		
Complete/Submit Controlled Substance Application		
Complete/Submit DEA Application		
Complete/Return Payer Applications		

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<b>Pre-Date of Hire Start-up</b>		
Office Space Prep, Signage Updates		
Confirm / Order IT and Computer Resources		
Office Medical Equipment and Supplies		
Office Furniture, Equipment, and Supplies		
Facilitate hospital-based and operating room Medical Equipment and Supplies as applicable.		
Appointment Cards		
Cell Phone Consideration		
Schedule Applications Training		
Notify Telecommunications and Answering Service		
Build E.H.R. Schedule		
Schedule Year 1 On Boarding Sessions		
<b>Post-Date of Hire – Year 1 On Boarding</b>		
<b>Months 1 through 3 – Guidelines/Customizable:</b>		
Identify and Meet with Assigned Medical Director and/or On Boarding Colleague		
Complete Office Specific Orientation		
Meet and Greet Sessions with All Practice Colleagues and Support Staff		
Block Time - Weekly, Monthly, Quarterly Meetings		
Initial Documentation, Coding, and Billing Session		
Meet and Greet Sessions with:		
• _____		
• _____		
• _____		
• _____		
• _____		
<b>Months 4 through 6 – Guidelines/Customizable:</b>		
Monthly Touch Base Meetings with Assigned Medical Director or On Boarding Colleague		
Initial Review of Actual Documentation, Coding, and Billing Results		
6-Month Touch Base Meeting with Administration and Practice Manager		
6-Month Survey on Awareness, Engagement, and Satisfaction; Identify and Address On Boarding Gaps		

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Item	Responsible Team / Person	Notes / Status
<b>Months 7 through 12 – Guidelines/Customizable:</b>		
Continue Monthly Touch Base Sessions with Assigned Medical Director or On Boarding Colleague		
Year-end Review of Actual Documentation, Coding, and Billing Results		
Year-end Touch Base Meeting with Administration and Practice Manager		
Year-end Survey on Awareness, Engagement, and Satisfaction; Identify and Address On Boarding Gaps		