

Provider Onboarding Onboarding Checklist

Four to Six Weeks Prior to Start Date:

✔	What?	Who?
	Email with Link to new hire, Workday onboarding information is sent to personal email account	Workday
	Schedule NEO and Getting Started at MPHCC	Recruitment
	Send Welcome Email to new provider's personal email account. Include: Marketing Information Survey Provider Information Sheet (for DS Point) All About Me Survey (If applicable) Request for Provider Photo Shoot (Do not include for Per Diem Providers)	Admin
	Send Outlook Calendar Invite for Photo Shoot (include as optional: Marketing Rep, PMD, DPO)	Admin
	Create Provider Profile on DS Point	Admin or DS Point, point person
	Create Marketing Materials for New Provider Signage for site, PowerPoint Slide, etc.	Marketing
	Reach out to all listed contacts/roles the provider will need to meet with to start scheduling meeting times	Admin
	Create Provider Onboarding Binder for Provider*	Admin
	Choose Primary and Secondary Supervising Physicians (please see Clinical Oversight for Providers for details)	PMD
	For PAs in NH, NPs in their 1 st 2 years of practice and Maine PAs with <4000 hours (~2 years full time) of clinical practice, prepare the Collaborative Practice Agreement (please see Clinical Oversight for Providers for details)	
	Determine Clinical Support Pairing	Ops Manager/DPO & PMD
	Create IT and Support Service Request form on the Port	PMD
	Onboarding Workday Task-Ensure Workday task is filled out (email from HR)	PMD
	Verify Maine and/or New Hampshire license is approved, and provider is able to practice	Credentialing

Two weeks prior to start date:

✔	What?	Who?
	Request any technical requirements or necessary items from IT/Procurement	DPO/Admin
	Send plant or create welcome basket, if appropriate	PMD/Admin
	Set-up athena training with CIT (athena 101 and athena 201)	DPO/PMD/Admin
	Ensure all meetings and trainings are scheduled for new provider	Admin

One week prior to start date:


✔	What?	Who?
	Prepare office and/or desk space	DPO/Support Services
	Schedule ergo evaluation to be performed within first week	DPO/Site Representative
	PMD welcome call	PMD
	Assign Provider Mentor – discuss expectations with mentor	PMD

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	Send an email to site and provider staff to announce new employee's arrival	PMD/Admin
	Get set-up on all required distribution lists and meeting invitations	Admin
	Schedule 1:1s with PMD	Admin
	Schedule 30/60/90/180-day check-ins and reviews with PMD	Admin
	Place Chart Review and Review Reminders on PMD Calendar 1 week prior to Check-ins and Reviews with PMD	Admin
	Ask DS Onboarding for Training Agenda to add to Binder	Admin
	Order Profile Cards and Business Cards through Creative Imaging	Admin or Designee for Site

Within first week:

 What?	Who?
Day one: "Getting Started at Martin's Point" at Marine Hospital, Frye Island	HR/Compliance/IT
Tour building and surrounding departments	DPO/PMD
Discuss parking procedures, if applicable	DPO/PMD
Introduce new employee to co-workers	DPO/PMD
Assist new employee with email set up, discuss calendar, TeamHealth On Call Calendar	IT
Compass overview, F9 Overview, COVID Resource Link Site, discuss departmental and MPHC policies, EE Clinical Advisory Team Overview	IT
Welcome breakfast or lunch with PMD, Director of Practice Ops and Operations Manager (ensure separately wrapped meals are ordered for each participant)	DPO/PMD/Ops Manager/Admin
Review schedule, holiday process and on call process/schedule	PMD
Discuss training schedule, expectations for first 30/60/90 days	PMD
Review the Provider Leader Compact	PMD
Review org chart and key stakeholders/partners	DPO/PMD
Begin athena training (Athena 101)	CIT Representative
Meet with site assigned Coder & Claims Creation Specialist– 60 minutes	Billing and Coding Representatives
Complete ergonomic assessment	Admin/Ergo rep
Sign up for Civil Treatment for All (Ensure Patient Care is blocked)	Provider/Admin/Ops
Reach out to Credentialing to get Picture License, DEA, NPI etc. uploaded to DS Point	Admin/DS Point Delegate

Within first two weeks:

 What?	Who?
Have provider sign the Collaborative Practice Agreement and submit to appropriate board (please see Clinical Oversight for Providers for details)	
Conduct ergonomic evaluation, make adjustments as needed	Support Services or delegate
Discuss job description and answer questions <ul style="list-style-type: none"> • Telephone and Zoom Video Visits <ul style="list-style-type: none"> ○ How to navigate Zoom ○ Video Annual Wellness Visits (VAWV) workflows • Guidance around in person visits vs. telehealth <ul style="list-style-type: none"> ○ Including types of visits, Phone vs. Video, etc. 	PMD

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	○ Labs, Imaging, etc.	
	Schedule 1:1 meetings through the quarter/year	PMD/Admin
	Check-in with staff members working with new provider to assess integration	PMD/Ops Manager
	1:1 – refer to detailed list of topics to cover	PMD
	Care team PSR or Embedded PSR – 2 meetings, 30 minutes each	DPO/Admin
	Assigned Clinical Support – 60-minute meeting	DPO/Admin
	Referrals Specialist – 60-minute meeting	DPO/Admin
	Lab overview – 30-minute meeting	DPO/Admin
	Radiology overview – 30-minute meeting (if applicable)	DPO/Admin
	Pharmacy overview (Portland/Portsmouth) – 30-minute meeting	DPO/Admin
	GA nurse- CDI introduction (prior to meeting with CQS) – 60 minutes	Admin
	Meet and greet with HRBP	DPO/Admin
	Manager, Practice Operations – review scheduling protocol (Include Assigned Clinical Support and Assigned Schedule Management PSR) <ul style="list-style-type: none"> • Telephone and Zoom Visit Overview • Clinical Triage algorithm (PMD) • COVID Tent Workflows and Testing Algorithm (PMD) • Acute Respiratory Infection (ARI) Clinic (PMD) • Greeter Process (Ops) • Universal Masking of Patients and Visitors (Ops) • Staff Temperature Checks and Masking Procedures (Ops) • Physical Distancing Interventions (Ops) • Direct MA Escort for Patients to avoid waiting areas (Ops) 	DPO/Admin/PMD
	Clinical Quality Specialist meet and greet – 90-minute meeting	DPO/Admin
	Schedule time to complete Compliance training – 2 hours	DPO/Admin
	PMP Set Up and Delegate Rights	CQS
	Martin's Point Controlled Substance Policy Overview	CQS
	Take any additional online courses through learning and development	PMD
	Watch PPE Training and Conservation Approach Videos	PMD/CQS/Clinical Trainer
	Sign up for and watch any online learning modules offered by Learning and Development in Workday	
	Schedule athena 201 training with CIT Representative	Admin
	Schedule “at elbow shadow” for Provider and CIT representative for first day of patients	Admin/Ops/CIT

Within first 30 days:

✓	What?	Who?
	Discuss role/expectations/progress/priorities	PMD
	Meet with ACC nurse – 30 minutes	DPO/Admin
	New employee attends NEO	HR Service Center
	Meet with Population Health Nurse – transition of care – 30 minutes (include ICC for Portland and Baribeau)	DPO/Admin
	Meet with VP of Delivery System	Admin

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	Meet and shadow in Specialties – 2 hours (Portland and Baribeau) (Optional)	DPO/Admin
	Welcome meeting with Chief Medical Officer (optional)	Admin
	Meet and greet with VP of CIT – review quality initiatives (include CQS and CS)	Admin
	athena check-in; assess concerns within 2 weeks of starting patient care	DPO/Admin
	Chart review/clinical practice review to support documentation	PMD
	Add Provider Information to TeamHealth Implementation Packets and email TeamHealth with Info	Admin or Team Health Liaison
	Billing and Coding Review for accuracy, improvement, etc. (email received by provider and PMD)	Billing and Coding

Within first 60 days:

✓	What?	Who?
	Complete chart reviews	PMD
	Hold 60-day check-in with new employee	PMD
	athena Refresher training and shadow	DPO/Admin

Within first 90 days:

✓	What?	Who?
	Complete chart reviews	PMD
	Hold 90-day check-in with new employee	PMD
	New employee attends NEO Luncheon	Learning & Development
	Assess effectiveness of mentor relationship	PMD
	athena refresher and shadow	DPO/Admin

Onboarding FAQ's:

Q: What is in the new hire onboarding link that the new employee receives from Workday?

A: During the offer process, the new employee will receive the following documents from Workday:

- Offer Letter – the candidate must sign and submit the offer letter in order to accept the position.
- Once the offer has been accepted, the candidate will receive:
 - Background check email from Sterling (our background check vendor)
 - Instructions for reviewing and/or completing Onboarding Forms in Workday
 - An “Employee Health History” (if required) to be completed and returned to the Employee Health Nurse. The candidate can complete the form and attach his/her/their immunization records and submit the form by signing it or the candidate can download the form and fax it to the Employee Health Nurse at the number provided on the form.
- The manager will receive an IT & Support Services Request Form. Once the form is complete, the manager signs the form and it is sent to IT and Support Services for action.
- The manager will also receive an “Onboarding Setup” task in their Workday inbox. This task allows them to personalize/customize the new employee’s on-boarding page by creating a personal message and indicating “People to Meet” and “Helpful Contacts”.
- After the offer is accepted, the hire process is initiated. The new employee will receive two e-mails from Workday: one with his/her/their new Workday user account and a temporary Workday password. The new employee will be

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required to change the password during the first log in. The new employee will complete the following tasks in **Workday Onboarding**:

- Enter his/her/their social security number
- Review and verify name and contact information
- Enter/Review personal information (gender, ethnicity, birth date, etc.)
- Complete the new hire section of the I-9 form
- Complete Federal and State Withholding Forms
- Enter Direct Deposit Information
- Enter Emergency Contact Information
- Complete a Questionnaire asking for the security badge information and for permission to publish birth date.

Q: What are the welcome letter and book that are sent from Engagement and Learning?

A: New people leaders receive a letter from David Howes welcoming them to the organization. In addition, the new leader will receive a book selected by David which emphasizes the management style we try to foster at MPH.C.

Q: What is NEO, and does a manager need to attend?

A: NEO is New Employee Orientation, an all-day introduction to Martin's Point which occurs once per month. *All* new employees, regardless of title or position, are required to attend.

Q: What is "Getting Started at MPH.C?"

A: "Getting Started" is a 4 hour-long introduction to HIPAA and other compliance requirements; Informational systems such as email access and the company intranet; and employee benefits at MPH.C. The program is facilitated every other week by the Human Resources department with assistance from Compliance and IT. In addition, all managers will also attend Getter Started for Leaders which is a 3-hour orientation and overview of the essential pieces of information needed for leaders.

Q: What "technical requirements or necessary items" might I need to request?

A: This will depend on the new employee's role. Often, this means requesting a computer (or laptop), phone, email account, corporate credit card, and appropriate user permissions to department-specific systems.

Q: What do I need to do in order to prepare my new employee's office space?

A: We ask that you ensure that the new employee's work area is clean, and that any necessary office supplies such as pens, paper, tape, staples, etc. are readily available. You will also want to be sure the new employee has a mail slot.

Q: What is Leader Connect?

A: People-leaders are assigned to groups facilitated by senior leadership in order to provide support, coaching, and mentoring. The groups meet at least once per quarter. If you, as a manager, are not part of a Leader Connect group, please let your HRBP know.

Q: What is a New Leader Assimilation?

A: When a leader joins an established team, it is important that they are introduced appropriately and can begin to garner the trust of their new department. For questions regarding the specifics of what is involved, please reach out to your HRBP.

Q: What are the requirements for supervisory periods for providers at Martin's Point?

A: There are multiple categories in which a provider will fall into our supervision policy. For the most up to date information please visit our F9 page. At a high level:

1. New Provider to Martin's Point with established practice: Provider will offer up patient MRNs for chart audits at 90 and 180 days.

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2. New Providers to Martin's Point AND new to practice: New Nurse Practitioners are subject to supervision for a minimum of 24 months. PAs in New Hampshire are subject to supervision for all practice. PAs in Maine are subject to supervision for the first 4000 hours (~2 years if working full time) of their clinical practice.

All providers are subject to Chart Audits, Clinical Supervision Performance Reviews and any other reviews deemed necessary by site leadership.

Q: What kind of things should I point out to the new employee in a tour of the building?

A: Make sure that the new employee can find the restrooms, break area, emergency exits, first aid kit(s), supplies, mail area, confidential waste, office equipment, manager's office, and a general lay-of-the-land. During the tour, we also ask that you inform the new employee about after-hours access and point out key/badge-only entry points.

Q: What calendar items should I be discussing with the new employee?

A: Please make sure the new employee understands how to accept meeting invitations, share calendars, and view their calendar. This is also a good time to discuss regularly scheduled staff or team meetings, holidays, and time-off requests. You will want to make sure that a new manager is aware of (and invited to) departmental and organizational leadership meetings.

Q: What kinds of policies should I make sure the new employee knows about?

A: First, we ask that you ensure that the new employee knows where (on Compass) to locate policies and procedures. Then, along with discussion of your own departmental policies, please be sure to go over MPHCC's smoking, dress code, birthday-as-a-holiday, and inclement weather policies.

Q: What is the point of a 30/60/90-day check-in if I already have scheduled one-on-ones with the new employee?

A: These check-in meetings are vitally important in order to review expectations, observations, issues, and priorities with the new employee, and ensure that there are no misunderstandings that might stand in the way of their success at MPHCC.

Q: Which of the Engagement and Learning offerings available should the new employee enroll in?

A: The only wrong answer to this question is "none of them!"

Q: What should be included in the Onboarding Binder for a new provider?

A:

- Welcome page that includes site contact information, as well as contact info for PMD, Director and Ops Manager
- Username and Password information from IT
- DS Onboarding Training Calendar and Site Onboarding Calendar
- Provider Onboarding Checklist
- Meet your Team (document with pictures and names of site staff)
- Athena Tips and Tricks Sheets
- PMP Information
- MPHCC Controlled Substance Policy
- 90 Day Performance Assessment Form (90-day Provider Individual Contributor)
- Martin's Point Health Care Mentor Information
- Provider Coverage Overview (Daily Inbox Coverage, On Call Explanation, etc.)
- Provider Time Off Protocol and Time Off Sheets
- Individual Development Plan through Workday
- MPHCC Guide for Effective 1:1 Meetings
- Ergo Information
- MAT Information
- Preferrals Information
- Provider Staff Schedules (Site Specific)
- MPHCC Acronyms Sheet

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MARTIN'S POINT™
HEALTHCARE

Any site-specific information

For NP/PAs

Clinical Oversight for Physician Assistants and Nurse Practitioners Policy

Supervision Agreements

Calendar for chart reviews

Anything else specific to your site, the provider's practice, etc.

DRAFT

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