TENNESSEE CHARITABLE CARE NETWORK

Clinician Onboarding Template

Onboarding Considerations

- Consider "The 5 Cs of Onboarding" as principles of success:
  - *Compliance*: Ensuring all necessary policies, regulations (like HIPAA), and documentation are handled efficiently.
  - *Clarification*: Clearly defining roles, responsibilities, and performance expectations.
  - *Culture:* Integrating the clinician into the organization's mission, values, and team dynamics.
  - *Connection:* Building relationships through mentorship and peer support to combat isolation.
  - *Confidence*: building self-efficacy through training and support, leading to greater independence.
- Define a timeline for onboarding duration (example 30 days, 30-90 days, 6 months, etc.) and desired milestones
- Determine an onboarding coordinator as a primary point of contact responsible for tracking progress and ensuring completion of all elements
- Compile necessary documents new staff will need to access for future reference in their role to support long-term independence and correct workflow

Onboarding Overview

- Administrative

Consider building a pre-start checklist of documents to collect prior to their first day of employment.

  - Collect employee's state medical license, board certification (if applicable), NPI, CPR training, DEA, etc.
  - Medical Documents: TB screening, Hep B vaccination (if applicable)
  - Ensure employee has updated state license, NPI database with new practice location
  - Review malpractice insurance coverage & information
  - Credentialling documents for insurers and payer panels (if applicable)
  - Emergency contact information

    - HR documents: W4, I-9, direct deposit info, etc.
    - Prepare ID badge, workstation, email & account logins, computer & necessary supplies
- Overview of Organization
    - Mission & Vision
    - Leadership Structure
    - Organization History
    - Employee Handbook
    - Staff emergency protocols, including OSHA & HIPPA training
    - Programs and key program partners
    - Contact information (for IT, area hospitals, on-call support, etc.)
- Organization Tour
    - Administrative
        - Door codes, bathrooms, break room, incoming/outgoing mail, parking, security
    - Clinical
        - Medical supplies & equipment such as medications, procedure supplies, vaccines, point of care tests, donations
        - Paper documents (if applicable): patient forms, consents, medical records
    - Technical
        - Phone systems, printers, fax machine, computers, etc.
    - Emergency preparedness (exits, AED, fire extinguishers, eye wash, emergency cart, etc.)
- "All Around" Introductions
    - Meet with various staff within the organization to understand their roles
        - Direct team members (nurses, MAs, support staff)
        - Leadership (Executive director/medical director)
        - Administrative Staff
        - Consider assigning a peer mentor
- EHR Training
    - EHR setup including EPCS if applicable
    - Upload driver's license & signature to EHR
    - EHR training modules to review independently
    - Clinic specific documentation processes; examples include:
        - Basic chart navigation

        - Mock patient visit
        - Clinical inbox
        - Utilizing order groups, patient cases and athena text
        - *Optional:* schedule a Provider Coaching session (one-on-one with athena staff)
- Clinical Workflow
    - Clinic policies & procedures including scope of practice guidelines, patient safety and reporting policies, standard operating procedures (SOPs) and professional conduct policies
    - Program & program partner specific workflows (internal processes, referral pathways)
    - Co-signature policy & process (if applicable for Advanced Practice Providers)
- Shadow Shifts
    - Patient Intake Process (nursing)
    - Clinical support roles (behavioral health, community health workers, social work, etc.)
    - Clinician
- Post-Orientation Check-ins
    - Discuss clinician comfort with workflows and systems
    - Review patient volume targets and timeline to increase to goal patient visits
    - Evaluate EHR documentation quality and chart efficiency
    - Identify areas needing additional support or training
    - Establish a post-orientation feedback opportunity for process improvement
    - Develop employee's professional goals & plan

Insert Logo Here

Title: (*example:* New Staff Clinician Onboarding Guide)

Clinic Location – *if multi-site and responsibilities or workflow varies by location*

Consider hyperlinking new employee setup guides here (i.e. EHR setup workflow)

CLINIC ORIENTATION

Contact & Hours of Operation

Address

Phone Number

Hours of Operation by Day & Time

Points of Contact

Practice manager/COO

Nursing Director

CMO/Lead Physician

IT/EHR support

Interpreter Services

Provide guidance for who to contact for clinical vs administrative vs technical issues.

Clinic Model

- *Example:* We operate in a team-based care model. Each care team typically includes a clinician, MA, and RN (often shared between 2 clinicians).
- *Consider attaching organizational chart & leadership responsibility guide here*
- *Include role & responsibility of staff vs volunteer clinicians*

Clinic Orientation

- *Provide guidance on room/staffing assignments, location of supplies and emergency equipment (printers, patient education handouts, AED/crash cart), interpreters/phone lines (including reference to workflow)*

Clinic Rooms

- *Clearly define what each room is used for, who is allowed to access it, and any restrictions (for medications, rooms, equipment, etc.)*
- **Triage**: includes eye wash station and vaccine refrigerators

- **Pharmacy**: the pharmacy includes sample/donated medications (free to give to patients), nebulizer machines with neb to administer in clinic, injectables to administer in clinic, blood pressure cuffs to lend out, and patient assistance medications to pick up

Patient Intake

- *Explain the patient intake process (outside the EHR). Examples below.*
- **Folders**: Front desk prints out a Facesheet and places in a colored folder at front desk – green (nurse visit), red (triage), blue (scheduled visit), yellow (BHC/SWK). The folder follows the patient through the clinic.
- **Exam Room Flags**: Gray (interpreter), Green (social work), Orange (BHC), Blue (nurse), Red (clinician).
- **Patient Intake process**: Nurse/MA brings back patient and gets vitals, reason for visit, reviews med list, completes any prep specified by PCP

CLINIC POLICIES AND PROTOCOLS

Emergency

- Crash Cart Equipment: *hyperlink equipment list if applicable*
  - *Provide reference to emergency equipment location(s)*
- Office Emergency Preparedness Plan: *hyperlink here*
- Medical Emergency Guidelines: *hyperlink here*
- Any additional emergency protocols, including training standards: *hyperlink here*

Clinic Policies & Protocols

- *Attach any applicable clinic policies & protocols and highlight those that need to be reviewed during onboarding "Required before first shift" versus those available for "Reference Only"*
- *Examples: Scope of care, incident reporting, deceased patient notification, disability evaluations, handling non-patient walk-ins, treatment of unaccompanied minors, respiratory pathogen & mask wearing, staff immunization, standing orders, medication/formulary constraints, referral eligibility, new patient eligibility, documentation standards, after hours clinical escalation, etc.*

Nursing

- *Attach any applicable nursing workflows and role standards (i.e. RN vs MA responsibilities, standing orders) that clinicians should be aware of*

PATIENT CARE

Reorder the list below as appropriate for your clinic priorities.

Wrap Around Services

- *For each service, standardize a role description, when to involve, how to refer, bi-directional communication standards, and point of contact. Examples below.*

- **Social Work:** The Social Worker addresses social determinants of health by partnering with patients and the Clinical Team to ensure patients have equitable access to resources which support their overall health and wellbeing. Social Work interventions may include conducting psychosocial assessments, facilitating referrals to community organizations, coaching patients to navigate various systems, advocating on behalf of patients, and empowering patients to advocate on their own behalf.
    - Point of contact: *List staff/volunteer social worker name(s)*
    - Examples of referrals: obtain glasses coupon, assist applying for financial assistance for emergency room bills, assistance with CSS referrals, etc.
- **Behavioral Health:**
    - Point of contact:
    - Example of referrals: anxiety, depression, stress, grief, sleep hygiene, smoking cessation, etc.
    - *Attach any related protocols, specifically any crisis protocols.*
- **Community Health:** Community Health Workers (CHWs) are trusted frontline workers who come from within the communities they serve and act as caring neighbors to help patients address the social, medical, and community problems that lead to poor health.
    - Points of Contact:
    - *Attach any related protocols.*

Specialty Care

- *If your clinic has any onsite specialty care (staff or volunteer, may also include dental services), list out the specialties and any scheduling parameters (Example: GYN volunteers once/month on Tuesdays. When requesting an appointment, specify priority level. -or- Ortho volunteers every Wednesday and does not perform carpal tunnel injections).*
- *Clearly define available specialty care, how to refer, if documentation is within same EHR or separate system, who is responsible for further testing and follow-up after specialist visits, and how specialists' recommendations are communicated to care team/PCP.*
- **X-ray:** *outline process to schedule, order, and attach applicable protocols*
- **Reviewing/co-signing volunteer clinician notes -and/or- Managing volunteer/specialist inbox:** *Attach any applicable protocols here*

Scheduling

- *Attach clinic master schedule template (i.e. what day each clinical staff works and patient slots/shift). Example below.*
    - PCP visits are either scheduled as 20 minutes (acute, follow up, diabetic follow up, etc.) or 40 minutes (complex, physical). Reserve complex visits for procedures (I.e. IUD placement, nexplanon removal, toenail removal) or medically complex visits
- *Include no show policy and overbooking policies*
- *Outline any scheduling workflows or protocols here. Example below:*

Below is a list of the appointment type categories in Athena. When requesting an appointment, always complete the date/time, appointment type (as below), and provider name

- Adult (anything adult primary care, our standard appts)
- Peds (all peds appt types)

- NS = nurse services (all nurse visits)
- O = other (wrap around)
- VOL = any volunteer appt types (i.e. specialist types)
- PP = program partner appointments

Telehealth Visits

- *Attach any applicable protocols and/or outline workflow for scheduling, conducting and documenting these visits. Consider patient eligibility criteria, consent requirements, documentation standards and limitations/scope of care for telehealth.*

Prescriptions

- *Attach any applicable policies and workflows here. Examples include how to print prescriptions, giving samples or dispensing medications, refill policies, patient assistance programs, onsite treatments (example: breathing treatment, injection), community pharmacy programs, controlled substance policy and patient pain contracts, and any internal documents regarding standards of prescription treatment or education.*
- *Provide access for low-cost medication resources.*

Patient Drug Assistance Program (PDAP)

- Point of Contact:
- PDAP: The Patient Drug Assistance Program (PDAP) provides eligible patients with free medications through manufacturer programs.
- *Attach applicable policies and workflows here. Consider adding a summary of eligibility requirements and common medications available.*

Procedures & Resources

- **Primary Care Procedures:**
    - Informed Consent: *Attach patient form here*
    - Clinician procedures: *List all common procedures performed in-clinic and any specific workflow or supply information. Attach policy about clinician scope of practice if applicable.*
    - Nursing procedures: *List all nursing approved procedures and any details/stipulations as applicable. Attach policy about nursing scope of practice if applicable.*
- **Supplies:**
    - *List available patient supplies/donations if applicable*
- **Specialist Procedures:**
    - *List any specialist procedures by role (Example: Derm performs punch and shave skin biopsies. Ortho performs joint injections and aspirations.)*

Labs & Onsite Testing

- **Lab Name**: *Attach and outline available labs, pricing (if applicable) and policies & workflow to add on labs at a later date. Explain expected turn around times for results and patient notification (including method – phone vs letter vs portal)*
- *If additional lab facilities for pathology, pap smears, genetic testing, etc., outline these separately.*
- *If any additional onsite testing available (point of care, retinal, audiometry, etc., attach applicable protocols and workflow for ordering and documenting results).*

Vaccines

- *List available vaccines. Specify if ordered through a patient assistance program vs self pay vs Vaccines for Children*
- *Attach vaccine application, ordering, administration and documentation policies and workflows*

Referrals

Point of Contact:

Brief Referrals Overview: *Attach workflow that outlines available external referral resources including the ordering and scheduling process. Referrals include specialist care, vision and dental, counseling/mental health, pregnancy resources, imaging, physical therapy, community and state programs (such as Tennessee Breast and Cervical Screening Program (TBCSP), and alternative therapies resources (massage, acupuncture, etc.).*

Infectious Disease Reporting

- *Attach documentation for required diseases to report and workflow.*
- *Attach Infectious disease reporting policy*

Medical Protocols

- *Attach any clinic specific medical protocols (i.e. Hepatitis C screening and treatment)*

EHR

EHR Name

- Staff Clinician Training Guide: *attach here*

Password Reset

- EHR Password Reset How To Guide: *attach here*

Managing Patient Care outside the Visit

- *Attach any workflows/standards for how to utilize the EHR. For example, include a guideline for When to Use a Patient Case vs Order Group vs AthenaText in athenahealth EHR.*

- *Define expectations for lab result follow-up timelines, inbox management responsibilities, and patient messaging turnaround time.*

Medical Records

- Point of Contact:
- Role: (*Example:* request medical records, scan offsite medical records for tests/specialists we've ordered)
    - *Explain or attach medical records request workflow*
    - *Attach offsite record access guidelines if applicable (example: if your staff have logins for imaging center scheduling sites or offsite record viewing)*

Scanning Documents

- *Attach workflow for scanning documents including both physical and electronic processes*

MISC ADMIN

PTO

- *Attach policy for requesting PTO & applicable resources*

Document Access (covered by HR)

- Email, Shared drive, etc.

ONBOARDING PLAN

Suggested New Staff Clinician Onboarding Timeline

- ✓ Clinic Video (20 min)
- ✓ HR review of policies and protocols (Staff trainer name)
- ✓ Tour of Office Facilities (Staff trainer name)
- ✓ Clinic Model & Operations (Staff trainer name)
- ✓ Tour of Clinic (Supervisor)
- ✓ EHR Training videos – (self guided)
- ✓ EHR Training (Staff trainer name, time expected)
- ✓ All Around *Clinic Name*
  - Include list of specific roles new employee should meet with, what needs to be covered and time expected
- ✓ Emergency Training (Staff trainer name)
- ✓ Shadow Shift: list out duration, location(s) and expectations
- ✓ First month: Defined patient caps and taper timeline, structured feedback sessions with supervisor, consider mentorship program

Misc Setup Needs

List out any miscellaneous setup needs (*Examples*: Add to Outlook Groups, Add Volunteer Specialists to Clinical Inbox, Set up Sharepoint access if any specific folder approvals)