NEW PHYSICIAN

**ORIENTATION CHECKLIST**

# Independent Physicians

**Attachments: - Orientation Tour Checklist**

* **Physician Preceptor**

**Checklist**

## Independent Physicians – Checklist

1. **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
* Identify consultant assisting with start-up of practice if appropriate (provide approved list to physician for evaluation and selection)
* Update Physician Orientation Manual
* Provide list of moving companies to new physicians. Determine selected carriers and authorize payment for SMH for move
* 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
* Order complimentary three-month newspaper subscription for physician, to begin first week of arrival
* Order flowers/plant for new physician to be delivered to their office after they have begun practicing (Check w/Melisa for wording on card.)
* 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)

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* Schedule meeting with physician and physician’s accounting firm and/or consultant to review financial expectations of contract and personal income tax implications with VP of Finance (may meet prior to start date, if desired)
* Schedule first-week meetings with leaders and/or coordinators for the following departments/functions (as appropriate to physician’s needs):
* Marketing ( Karen Gainey)
* Medical Records (Tracey Page)
* Laboratory (Pat Gentry and Donna Richardson, MD)
* Imaging (Zim Townsend)
* Respiratory, Cardiopulmonary and Neurology Services (Rick Hinson)
* Centralized Scheduling (Dave Salzlein)
* Managed Care/PHO (Dave Salzlein)
* Pharmacy (Ronnie Strickland)
* House Rules and Small Community Hospital Attributes (Terry Celadon)
* Outreach Clinics (Andrea Fields)
* Occupational Health (Andrea Fields)
* Nutritional Counseling (Adel Reyes & Louise Cruz)
* Rehab Services (Robin Crump)
* Cardiac Rehab (Peggy Smith)
* Nursery (Libby Dolen)
* Women’s Services (Libby Dolen)
* Peds/Ortho (Libby Dolen)
* VP, Support Services (Hew Fulton)

\_\_ Medical Staff Services (Lisa Byrd)

* Risk Management, Case Management, Utilization Management, & Regulatory Affairs ,Clinical Documentation Management Program and Interqual Criteria (Lisa Byrd)
* Performance Improvement/Peer Review (Sharon McGinnis)
* Surgical Orientation (Pat Decker)
* Emergency Center (Ryan Mackey)
* Director, Information Systems (Larry Pergerson)
* Customer Relations (Ronnie Norton)
* Scotland Cancer Treatment Center (Camille Utter)
* Progressive Medical Care Services (Arletha Brown)
* Critical Care Services (Alicia Garner)
* IP Rehab (Juanita Sweeney)
* Hospice (Linda McQueen)
* VP, Finance (Matt Pracht) – to review recruitment incentive advance, if applicable, and tax implications
* Clinical Educator- (Greg Stanley)
* Physician Recruitment and Marketing (Melisa Ciarrocca)
* Department Chairman
* VP, Operations (Ruth Glaser)
* Director, Scotland Memorial Foundation (Becca Hughes)
* Greg Wood (Pres. and CEO)
* Assess if need for keys to be distributed prior to orientation appointment with Medical Staff Coordinator.
* Ask Information Systems to order beepers and set-up Meditech numbers for new physicians. If physician office out of town, ask Information Systems to determine special needs, such as cell phone as back up. Ask Mike Howell
* 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
* Alert Health Information Management Director of the need for a new physician mailbox. E-Mail Tracey Page and let her know 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
* Supply business office with the names of all new physicians and their immediate family members for the purpose of calculating the appropriate discount off hospital charges (Donna Todd and Ruth Ann Bland)
* Call Duke and Chapel Hill 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

**VP Finance (in collaboration with others, as appropriate)**

* Communicate appropriate components of physician contract to affected departments/associates (for budget, incentive advance amortization, recruitment monitoring of net income guarantee caps and disbursements, etc.)
* Determine if new physician will need a hospital provider number

Physician’s Receptionist or Office Manager (or SMH 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 consultant/office manager

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* Assure applications for NC and/or SC 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.

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 physician or consultant with information on yellow pages advertising
* 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

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* Supply physician and/or consultant with information on group malpractice and purchasing discounts

VP, Operations and/or VP of Patient Care Services (as appropriate for specialty) or designee

* Coordinate as necessary with Director of Engineering for advance storage of equipment/furnishings for practice
* Finalize lease arrangements for physicians practicing in SMH space
* Assign contact(s) to determine physician’s special and/or capital needs (such as Operating Room time, contractual services, new equipment needs or requests, etc.)

Clinical Educator

* Assess educational needs for staff, especially as related to a new service
1. 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)
1. Miscellaneous – Timing as Appropriate

Director of Physician Recruitment & Retention

* Schedule breakfast meeting with *President/CEO and Chief of Medical Staff* for overview of Scotland Health Care System and Medial Staff mission, governance, strategic plans, etc. (includes all new 2000 physicians signed to date, so may be delayed for some physicians until all physicians arrive)
* Plan Open Houses at Physicians’ offices, as appropriate, during first few months of practice
* Regular contact with new physician and his/her spouse 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 to Laurinburg

\* refers to items unique to Independent Physicians