

Comprehensive Healthcare Provider Onboarding Checklist



CISIVE
PreCheck



Pre-Onboarding: Offer & Preparation

- ☐ Send formal offer letter and employment agreement
- ☐ Collect signed documentation and consent forms
- ☐ Provide detailed job description, schedule expectations, and worksite information
- ☐ Assign an onboarding coordinator or point of contact



Credentialing & Compliance

- ☐ Primary source verification of:
 - ☐ Medical license(s)
 - ☐ DEA registration
 - ☐ NPI number
 - ☐ Specialty board certifications
- ☐ Conduct background check (criminal, employment, education)
- ☐ Verify malpractice insurance and claims history
- ☐ Ensure eligibility for payer networks and hospital privileges
- ☐ Confirm compliance with federal/state regulations and facility policies



Documentation & HR Paperwork

- ☐ Complete I-9 employment eligibility verification
- ☐ Collect direct deposit and tax forms (W-4, state tax)
- ☐ Set up employee benefits enrollment (health, dental, retirement, etc.)
- ☐ Review confidentiality and HIPAA agreements
- ☐ Distribute employee handbook and policies



Technology & System Access

- ☐ Set up email, EHR access, and phone credentials
- ☐ Grant access to internal portals, scheduling tools, and referral systems

- ☐ Provide training on EHR documentation and compliance requirements
- ☐ Assign login credentials for CME or learning management platforms



Orientation & Training

- ☐ Schedule new hire orientation session
- ☐ Train on:
 - ☐ Clinical workflows and care protocols
 - ☐ Patient communication standards
 - ☐ Emergency procedures and safety protocols
- ☐ Introduce provider to key staff and department leads
- ☐ Offer mentorship or shadowing opportunities



Communication & Integration

- ☐ Welcome announcement to staff and patients (as appropriate)
- ☐ Schedule introductory meetings with department and leadership teams
- ☐ Conduct weekly check-ins during the first 30-90 days
- ☐ Solicit feedback on onboarding experience



Ongoing Support & Development

- ☐ Provide access to CME and professional development resources
- ☐ Clarify performance expectations and quality benchmarks
- ☐ Establish a timeline for regular performance evaluations
- ☐ Support involvement in organizational committees or improvement initiatives

