Healthcare Onboarding Checklist

For physicians, nurses and other clinicians, from the weeks before day one through day 90.

CLINICIAN NAME	ROLE AND SPECIALTY	START DATE
DEPARTMENT OR FACILITY	**ONBOARDING COORDINATOR**	**MENTOR OR PRECEPTOR**

How to use it: give each task an owner and a due date, then initial and date it when it is done. The owners shown are suggestions. Adapt the list to your facility, your specialty and the clinician's role.

1 Pre-Arrival 2 to 4 weeks before the start date

	TASK	OWNER	DUE	DONE (INITIALS, DATE)
☐	**License verified with the state licensing board** Medical, nursing or other board, depending on the role	HR / Credentialing		
☐	**National background check and criminal history screening**	HR		
☐	**Education and certifications verified**	HR / Credentialing		
☐	**Professional references from previous employers**	HR		
☐	**Malpractice insurance reviewed** If applicable	HR / Credentialing		
☐	**Immunization records documented** COVID-19, flu, MMR, Tdap and any others your facility requires	Occupational Health		
☐	**Health screening and medical clearance complete**	Occupational Health		
☐	**EHR user account created**	IT		
☐	**Email and communication platforms set up**	IT		
☐	**Badge and access card ordered**	Security		
☐	**Hardware arranged** Laptop, phone and anything else the role needs	IT		
☐	**Login credentials prepared securely for day one**	IT		
☐	**Welcome package sent** Facility information, parking, first-day schedule, dress code and a welcome letter from leadership	HR		
☐	**Introduction call from the department manager**	Department manager		

2 First Day Day 1

	TASK	OWNER	DUE	DONE (INITIALS, DATE)
☐	**Facility tour** Clinical units, break rooms, emergency exits, supply areas and administrative offices	Department manager		
☐	**Introductions to the team, manager and key colleagues**	Department manager		
☐	**Badge tested on doors and parking**	Security		
☐	**Access to core systems tested, including the EHR**	IT		
☐	**EHR overview (1 to 2 hours)** Navigation, the schedule, patient records and documentation	Clinical educator		
☐	**Emergency procedures and safety** Fire evacuation routes, code response, hazardous materials and infection control basics	Department manager		

3 First Week Days 2 to 5

	TASK	OWNER	DUE	DONE (INITIALS, DATE)
☐	**Role-specific training** Record which skills are covered and which still need assessment	Clinical educator		
☐	**Hands-on EHR training with test patients** Orders, assessments, labs and the sections the role uses most	Clinical educator		
☐	**Infection prevention and control training**	Compliance		
☐	**Patient privacy and confidentiality training**	Compliance		
☐	**Mandatory reporting protocols**	Compliance		
☐	**Workplace safety and ergonomics**	Compliance		
☐	**Anti-harassment and respectful workplace policies**	HR		
☐	**Mentor or preceptor assigned**	Department manager		
☐	**Scheduling and call coverage orientation** Scheduling policies, call expectations, shift rotations and how to request time off	Scheduler		

4 First 30 Days Days 6 to 30

	TASK	OWNER	DUE	DONE (INITIALS, DATE)
☐	**Supervised clinical work, documented** Observation, then supervised practice, then supervised independent practice	Mentor		
☐	**Technical skill demonstrations**	Clinical educator		

	TASK	OWNER	DUE	DONE (INITIALS, DATE)
☐	**Critical thinking and decision-making scenarios**	Clinical educator		
☐	**Communication and teamwork evaluation**	Mentor		
☐	**Time management and efficiency assessment**	Mentor		
☐	**Weekly 15 to 30 minute check-ins with the mentor**	Mentor		
☐	**Benefits enrollment complete** Health insurance, retirement plan and dependent coverage, with questions answered	HR		
☐	**30-day review** With HR, the department manager and the mentor	HR		

5 Days 31 to 90 Growing independence, with support in place

	TASK	OWNER	DUE	DONE (INITIALS, DATE)
☐	**More independent patient care** Mentor check-ins move from daily to periodic, focused on complex cases	Mentor		
☐	**Mid-period review (around day 60)**	Department manager		
☐	**90-day review** Competency, team integration, patient care quality and safety, communication, and fit with the facility's values	Department manager		
☐	**Ongoing credential monitoring set up** License renewals, continuing education and certification expiration dates flagged well ahead	HR / Credentialing		
☐	**On the regular scheduling rotation** Call patterns, coverage expectations and the regular assignment are clear	Scheduler		
☐	**Onboarding formally closed and documented**	Onboarding coordinator		

Onboarding Complete

Sign when every task above is done, or has a note explaining why it does not apply.

ONBOARDING COORDINATOR _____ DATE _____

CLINICIAN _____ DATE _____

DEPARTMENT MANAGER _____ DATE _____

The full guide behind each phase: medstafftracker.com/blog/medical-staff-onboarding-checklist