



APPENDIX C — SAMPLE ONBOARDING PLAN

A Complete 90-Day, High-Touch, High-Support Physician Onboarding Framework

A structured model for launching every physician with confidence, clarity, and early wins.

This onboarding plan provides a comprehensive roadmap for integrating a physician into your organization during their first 90 days. It includes timelines, checklists, communication standards, and support structures that ensure a seamless transition and strong early traction.

Use this as a template, adapting each section to your organization, specialty, and service-line needs.

SECTION 1 — ONBOARDING OVERVIEW

The purpose of onboarding is confidence, connection, and early momentum.

A successful onboarding plan should achieve:

- A welcoming, professional first impression
- Smooth credentialing & payor enrollment
- Clear expectations
- EMR and IT readiness
- Efficient clinic & OR setup
- Early clinical confidence
- Strong team relationships
- Cultural integration
- Clear communication rhythms
- Rapid removal of friction points
- Community and family support

This 90-day roadmap builds the foundation for long-term retention.



SECTION 2 — PRE-START PREPARATION (30–90 DAYS PRIOR TO START DATE)

Everything that happens before Day 1 determines how Day 1 will feel.

Credentialing & Payor Enrollment

- ☐ Credentialing initiated immediately
- ☐ Payor enrollment submitted (Medicare/Medicaid/Commercial)
- ☐ Malpractice history and verifications completed
- ☐ CAQH updated
- ☐ Hospital privileges submitted
- ☐ Weekly updates sent to the physician

Operational Setup

- ☐ EMR account created
- ☐ Templates built (clinic, OR, notes)
- ☐ Dictation tools configured
- ☐ Specialty-specific order sets prepared
- ☐ Clinic schedule templates built

Clinic & OR Readiness

- ☐ MA/APP paired with a physician
- ☐ Equipment checklist completed
- ☐ Office space assigned and prepared
- ☐ OR block time confirmed



- ☐ Support staff briefed on arrival

Leadership & Team Preparation

- ☐ Onboarding champion assigned
- ☐ Leadership welcome messages scheduled
- ☐ Team orientation plan created
- ☐ Welcome email drafted

Family & Community Support

- ☐ Relocation assistance complete
- ☐ Spouse/community integration outreach
- ☐ School/housing resources shared

SECTION 3 — DAY 1 AGENDA

Warm, organized, and supportive - first impressions matter.

Welcome & Orientation

- ☐ HR orientation
- ☐ Benefits & payroll setup
- ☐ ID badge & parking
- ☐ EMR login and access testing

Leadership Connections

- ☐ Welcome meeting with CMO or service-line leader
- ☐ Department tour



- ☐ Meet nursing & clinic leadership
- ☐ Welcome lunch with key team members

Operational Integration

- ☐ Clinic walkthrough
- ☐ OR walkthrough
- ☐ Review equipment locations
- ☐ Review typical patient flow
- ☐ Review referral processes

Day 1 Goal:

Physician leaves feeling supported, welcomed, and confident in who to contact for help.

SECTION 4 — WEEK 1 PLAN

Slow, supported re-entry into clinical practice.

Clinical Ramping

- ☐ Light clinic schedule (1–2 half days)
- ☐ Observe partner or peer in clinic for workflow learning
- ☐ OR observation morning/day
- ☐ Daily check-in with onboarding champion



Operational Support

- ☐ EMR personalization session
- ☐ Troubleshooting clinic or OR processes
- ☐ Review of order sets and note templates

Connections

- ☐ Meet APPs/MAs
- ☐ Meet schedulers and referral team
- ☐ Meet radiology, lab, and OR leaders

SECTION 5 — FIRST 30 DAYS

Build confidence through structure, early wins, and protected learning time.

Clinical Ramp-Up

- ☐ Increase clinic sessions gradually
- ☐ First OR day with full support
- ☐ Troubleshoot workflow issues weekly

Communication & Support

- ☐ Weekly leadership check-in
- ☐ Weekly onboarding champion meeting
- ☐ Weekly EMR support



Culture & Team Integration

- ☐ Internal welcome announcement
- ☐ Mentor pairing
- ☐ Introduction to physician teams
- ☐ Attend department meetings

Operations Optimization

- ☐ Adjust EMR templates
- ☐ Review clinic scheduling patterns
- ☐ Review call processes
- ☐ Ensure OR block time matches needs

Day 30 Goal:

Physician feels clinically stable, culturally welcomed, and supported.

SECTION 6 — FIRST 60 DAYS

Increase autonomy and refine workflows.

Clinical Development

- ☐ Full clinic schedule operational
- ☐ More OR block utilization
- ☐ Identify patient panel trends
- ☐ Review productivity patterns



Leadership Engagement

- ☐ Biweekly check-ins
- ☐ Barrier removal (OR turnover, clinic flow, equipment issues)

Team & Culture

- ☐ Participate in staff huddles
- ☐ Integrated into call rotation (with mentorship support)
- ☐ Spouse/family outreach check-in

Operational Stability

- ☐ Adjust clinic templates as needed
- ☐ Evaluate APP/MA pairing
- ☐ Fine-tune referral workflows

Day 60 Goal:

Physician feels increasingly autonomous but still supported.

SECTION 7 — FIRST 90 DAYS

Create stability, build confidence, and lock in early wins.

Clinical Integration

- ☐ Full clinical and surgical integration
- ☐ OR block efficiency reviewed
- ☐ Referral relationships reinforced



Leadership & Growth

- ☐ 90-day evaluation meeting
- ☐ Discuss early wins
- ☐ Discuss ongoing challenges
- ☐ Set clear 6-month goals

Cultural Strength

- ☐ Physician feels connected to team
- ☐ Conflicts or concerns addressed early
- ☐ Staff feedback incorporated
- ☐ Celebrate accomplishments

Operational Excellence

- ☐ Clinic flow optimized
- ☐ EMR proficiency established
- ☐ Call schedule stable
- ☐ Metrics and expectations clarified

Day 90 Goal:

Physician is confident, connected, productive, and aligned for long-term success.



SECTION 8 — 90-DAY REVIEW TEMPLATE

Physician Name:

Specialty:

Start Date:

Reviewer:

Clinical Integration

- Strengths:
- Challenges:
- Additional support needed:

Operational Alignment

- Workflow barriers:
- Template adjustments needed:
- OR access review:

Team & Culture

- Staff feedback:
- Peer/partner feedback:
- Culture fit:

Leadership Feedback

- Communication
- Support
- Early wins

Next Steps (6-month plan):

- Specific goals:



- Follow-up action items:
- Leadership commitments:

SECTION 9 — EARLY WINS MAP (PRINTABLE TOOL)

Week 1:

- Orientation
- EMR setup
- First clinic observation
- OR walkthrough

Weeks 2–3:

- Light clinic
- First procedures
- Support check-ins

Weeks 4–6:

- First OR block
- Workflow optimization
- Referral introductions

Weeks 7–12:

- Full integration
- Identify strengths
- Adjust templates
- Review metrics

This map ensures predictable momentum and early success.



SECTION 10 — SUMMARY: THE ONBOARDING PRINCIPLES THAT DRIVE RETENTION

- Onboarding begins before Day 1.
- Structure prevents confusion.
- Support prevents early burnout.
- Leadership visibility creates trust.
- Early wins drive long-term retention.
- Communication eliminates anxiety.
- Operational alignment ensures success.
- Family support strengthens stability.

A great onboarding experience is one of the strongest retention tools an organization can invest in.