



Physician Onboarding

HealthForceOntario Marketing and Recruitment Agency

| January 2019

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Introduction



Congratulations, a new physician is set to join your community shortly!

A comprehensive onboarding program that involves your community and clinic/hospital will help your new physician feel welcome and adjust to the new practice. It will also reinforce the physician's decision to join the practice and encourage community engagement.

This guide is comprised of practical advice and tools that your community can use right away to develop a physician retention program. The back of this guide has tools to help you through the process, including checklists to assist you in keeping track of all the essential onboarding steps.

With a program in place, you'll be able to create a positive experience for your new physician and increase the likelihood of retention.

Your community has invested a lot of time and energy to successfully recruit a new physician. This guide will help you keep that physician.

It is important to remember the principles of this guide also apply to locum physicians and learners as well. Although they are in the community for a limited amount of time, an onboarding program will help to create a positive impression and support recruitment.

Physician Retention Leadership



The whole community benefits when physicians are retained; there is greater access to care and greater continuity of care. When the community takes an active role in helping a new physician and his or her family to feel welcome, it can make a significant difference in that physician's long-term satisfaction with the community and practice.

It's important for someone to be responsible for physician retention, and the more people involved the better. One approach is to create a Physician Retention Committee. You'll want to find a network of volunteers from across the community who will work together to develop physician retention strategies and spearhead the retention activities.

While many of the activities occur within the first few weeks of arrival, remember that retention begins even before the new physician arrives and is ongoing. Below is a timeline highlighting a few suggested activities:

1

Before the Physician Arrives

- Send a welcome letter to the physician and his or her family.
- Support needs related to housing or schools.
- Interview the family to determine community areas of interest.

2

Arrival

- Greeter
- Welcome gift
- Settlement support during the first few days.

Physician Retention Leadership cont'd...

3

First Few Weeks

- Introduce the Community Navigator, host family (if applicable), community advocate(s).
- Provide the new physician with local contact numbers and connections to areas of interest (e.g. hobbies and activities).
- Host a community-based reception.
- Ongoing support of spousal employment.
- Highlight cultural and recreational opportunities.
- Send the local paper a media release to announce the physician has joined the community (see [media release section](#)) or take out an ad welcoming the physician to the community. Welcome the physician on behalf of your partner organizations to help the physician feel connected to the resources available.
- Schedule official feedback appointments with the physician to understand and manage any unforeseen issues.

4

Ongoing

- Plan a recognition event or ceremony.
- Conduct regular meetings to understand the changing needs of the physician and the family.
- Connect the physician and his or her family with appropriate community members based on interest and needs.
- Follow up with physician leadership to find out if there are areas you can support; it's important to make your new recruit feel connected to physician leadership.
- If appropriate, ask the new physician to provide feedback and/or participate in your recruitment and retention activities.
- Physicians from outside of Canada may require support for the first few years to transition from a restricted to independent licence or immigration support to transition from temporary work status (e.g. work permit) to permanent resident status.

For more details, see the [Inventory of Interests](#) form and the [Community Orientation Planner](#) in the [Tools and Resources](#) section.

The Community Navigator



The Retention Committee/Leader will want to have a community navigation source. One way to do that is to appoint a Community Navigator. This person will connect directly with the new physician, acting as a host and serving as a link to the larger community. The Community Navigator will also work closely with the Clinical Mentor. Choose your Navigator wisely. It may be beneficial to ask your local recruiter to take on this role as he or she will know the community well and be able to facilitate intergration. A local physician may also be a good choice, as a peer can connect the new physician with other physicians (and families).

Below is a timeline highlighting a few activities the Community Navigator can lead:

- 1** ***Before the Physician Arrives***
 - Send a welcome letter to the family.
- 2** ***Arrival***
 - Serve as the greeter or conduct the community tour.
- 3** ***First Few Weeks***
 - Invite the new physician's family to dinner.
 - Create opportunities to meet other families within the community.
- 4** ***Ongoing***
 - Invite the physician and his or her family to community events and activities, especially those for which they have indicated an interest.
 - Keep the physician's family informed of sign-up dates for community children's events.
 - Participate in physician recognition activities.
 - Maintain regular contact.

Clinical Orientation



Of course, the new physician will be excited to join his or her practice and work with a new team. To help welcome the new physician at work and facilitate a smooth transition, the clinic/hospital will want to take care of all the necessary administrative tasks, provide information about how the practice works, and set up introductory meetings with colleagues.

Below is a timeline that highlights a few activities the organization can undertake to prepare for and integrate a new physician into the clinical environment.

1

Before the Physician Arrives

- Confirm the organization has all of the physician's credentialing documents.
- Initiate hospital privileges.
- Set up the physician's office, including phone, computer, name plate.
- Create or order identification badges, access cards, pager.
- Send an announcement about the new physician to staff.
- Send a welcome letter to the new physician.

2

Arrival

- Arrange for a tour of the clinic and/or hospital.
- Arrange a meeting with the hospital CEO and Chief of Staff.
- Designate an IT member to support the physician (e.g. setting up voicemail and password package for hospital EMR, PACS, etc. . .)
- Schedule administrative and clinical orientation meetings; review with the physician roles and expectations of the administrative and clinical staff.

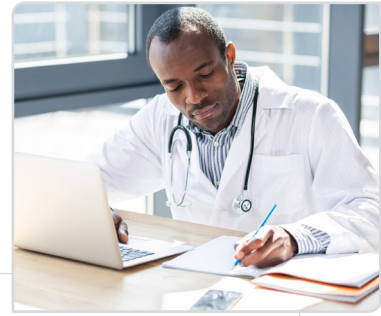
3

First Few Weeks

- Connect the new physician to local resources and programs (e.g. social services, mental health assistance, home and community support services, etc.)
- Connect the new physician to the LHIN to make him or her aware of regional programs and services (see [LHIN Resources](#)), as well as to HealthForceOntario for practice supports (see [HealthForceOntario Resources](#)).

For more details, see the ***Clinic/Hospital Checklist for New Physician Arrival*** and ***Sample First Week Itinerary*** in the *Tools and Resources* section.

Clinical Mentorship Program



In addition to the clinical orientation, your clinic/hospital may want to access or establish a clinical mentorship program to provide additional support to your new physician.

The Ontario College of Family Physicians' (OCFP) recently launched the **Rural Mentoring Network Initiative**. Initially being piloted in the North West, North East and South West LHINs, physicians (including locum physicians) can join the network to receive support for managing a range of practice challenges, including providing emergency care. Learn more [here](#).

If your clinic/hospital decides to set up its own mentorship program, be sure there is structured organizational support in place. Your experienced physicians who have been working in the community for a while would be well suited to provide mentorship. It's also a great idea to provide training for the mentors, especially if they are new to mentorship. Connect with LHIN clinical leadership to explore existing supports that will benefit your new recruit. With your mentors in place, be thoughtful of matching them with mentees. Consider how your organization will monitor and evaluate the mentorship program/relationship.

Below are suggested timelines for mentorship meetings and program evaluation:

Meetings:

| | |
|----------------|--|
| First 2 months | 1 x a week |
| Next 10 months | 1 x every two to three weeks |
| Ongoing | A meeting schedule that is comfortable for both mentor and mentee. |

Evaluation:

Survey the mentor and new physician at:

- The end of 2 months.
- The end of 12 months.

Your program will develop based on the feedback of the participants.

HealthForceOntario has additional information about mentorship in its *Recruitment Essentials – Recruitment and Retention* module (pages 9-12).

healthforceontario.ca/recruitmentessentials

The Clinical Mentor



With your clinical mentorship program in place, you can select a clinical mentor for the new physician. The clinical mentor will act as a professional guide to the new physician, helping him or her become accustomed to clinic and hospital operations, making introductions to medical staff, and providing advice when needed. The Clinical Mentor will also work closely with the Community Navigator and the Recruiter.

Below is a timeline highlighting a few activities the Clinical Mentor can undertake:

1 *Before the Physician Arrives*

- Welcome letter to the new physician.

2 *Arrival – First Week*

- Welcome meeting.
- Invite the physician and his or her family to dinner.
- Introduce the physician to referring physicians, colleagues, medical staff, department heads.
- Review hospital-specific topics: admitting patients, rounds, accessing support.
- Schedule an opportunity for the new physician to shadow the mentor during suitable times.
- Introduce regional support systems and resources.

3 *Ongoing*

- Introduce opportunities for professional support, training or programs.
- Offer to be a resource for difficult cases and troublesome patients.
- Assist the new physician in navigating local system issues.
- Offer to go together to medical staff social events.

Media Release



When a local newspaper runs a story about the arrival of a new physician, it welcomes the physician to the community, shares the good news about increased access to patient care, and helps to engage community members in supporting the physician's integration into the community. The best way to request a story is to create a media release.

In your release be sure to mention the following:

- The physician's specialty and what practice or hospital the physician joined.
- Whether the physician is accepting new patients.
- Highlights of the recruitment process, including any partner's contributions.
- The impact of the recruitment on the community.

Additional Tips:

- Keep the release to one page.
- Use short paragraphs and simple sentences.
- Include a quote from your organization about the recruitment.
- Check the accuracy of facts and follow your organization's approval process before distributing the release.
- Find out which editor or reporter the release should be sent to at the paper (e.g. City Editor/Assignment Editor, News Editor, Health Reporter).
- After sending the release, follow up with a phone call to confirm it was received.

HFO's *Recruitment Essentials* "Working with the Media" module has more information on this topic.

For assistance with writing a media release, review the *Sample Media Release Template*.

Inventory of Interests

| | | |
|---------------------------------------|--|--|
| INVENTORY OF INTERESTS | | |
| Date _____ | | |
| Name of Physician/Family _____ | | |

| Interest | Details | Actioned by |
|--|---------|-------------|
| Sports Facilities/Lessons/Programs | | |
| Parks and Recreation (Provide Guide) | | |
| Education | | |
| Social Networking Religious Organization/ Community Centre After School/PTA/Craft Group | | |
| Spiritual Needs | | |
| Language/Employment Needs | | |

TIP: Make sure the physician and family are aware of all the unique features and programs in your community. Modify the form accordingly.

Community Orientation Planner

| Planner | Activity Assigned To | Planned Date | Date Delivered |
|--|----------------------|--------------|----------------|
| <i>Pre Arrival</i> | | | |
| Make arrangements for temporary accommodations. | | | |
| Provide information about the arrangements for temporary accommodations. | | | |
| Link the physician to preferred services such as banks, lawyers, real estate agent, car dealerships and accountants. | | | |
| <i>Arrival</i> | | | |
| Ensure the greeter has the travel itinerary. | | | |
| Identify the contact person who is available and ready to trouble shoot and provide assistance. | | | |
| Make arrangements to buy and deliver the welcome gift. | | | |
| <i>Personal Settlement</i> | | | |
| Assign and introduce the Community Navigator. | | | |
| Provide support with banking/financial arrangements. | | | |
| Provide support to obtain provincial health coverage if applicable. | | | |
| Provide important information and introductions to the education system. | | | |
| Provide introduction to community recreational and cultural activities. | | | |

Community Orientation Planner cont'd...

| Planner | Activity Assigned To | Planned Date | Date Delivered |
|---|----------------------|--------------|----------------|
| <i>Personal Settlement cont'd...</i> | | | |
| Provide new physician with contact numbers and connections to areas of interest (e.g. hobbies, activities). | | | |
| Provide active assistance to the partner with employment. | | | |
| Plan Welcome Event. | | | |
| <i>Ongoing Activities</i> | | | |
| Conduct regular meetings to understand the changing needs of the physician and the family. | | | |
| Connect the physician and his or her family with appropriate community members based on interest and needs. | | | |
| Follow up with physician leadership to find out if there are areas you can support. | | | |
| If appropriate, ask the new physician to provide feedback and/or participate in your recruitment and retention activities. | | | |
| <i>Celebrate</i> | | | |
| Cards - track the communication and ensure cards are sent out on an ongoing basis from a variety of people. | | | |
| Communications through the local newspaper. Track the communication and ensure that articles are placed at regular intervals to introduce, recognize, and congratulate. | | | |
| Plan a recognition event or ceremony. | | | |

Clinic/Hospital Checklist for New Physician Arrival

1

Before the Physician Arrives

Administrative

- Confirm the organization has all of the physician's credentialing documents (e.g. CPSO and CMPA) and other needed documentation (e.g. vulnerable sector screening requirements)
- Initiate hospital privileges (if required)
- Assign administrative support to the new physician.
- Clean and set up the physician's office, including phone, computer (including appropriate internal email distribution lists), name plate, desk supplies.
- Create or order identification badges, access cards, pager.
- Develop materials to support the orientation meetings.
- Create a first-day itinerary for new physician – including a social meet and greet.
- Send an announcement about the new physician to staff.

Clinical

- Select a clinical mentor for the new physician
- Discuss clinic schedule and booking with Clinical Manager; check with the new physician regarding planned vacation days and conference leaves. Confirm clinic and on-call start dates with the new physician.

Clinic/Hospital Checklist for New Physician Arrival cont'd...

2

When the Physician Arrives

Administrative

- Administration to meet with new physician regarding organization orientation, welcome package information, benefits, billing, etc.
- Designate an IT member to support the physician (e.g. setting up voicemail and password package for hospital EMR, PACS, etc...).
- Schedule an administrative orientation meeting to cover topics such as: academic allowance, mail process, calendar access and maintenance; review roles and expectations of the administrative staff.

Clinical

- Arrange for a tour of the clinic and hospital.
- Arrange a meeting with the hospital CEO and Chief of Staff.
- Schedule a clinical orientation meeting to cover topics such as: clinic process, billing information, forms; review roles and expectations of the clinical staff.
- Schedule a training program meeting (if there is one) to cover topics such as: program overview, resident and fellow expectations, evaluations.
- Connect the new physician to local resources (e.g. social services, mental health assistance, home and community support services, etc.).
- Connect the new physician to the LHIN to make him or her aware of regional programs and services (see [LHIN Resources](#)), as well as to HealthForceOntario for practice supports (see [HealthForceOntario Resources](#)).

Sample First-Week Itinerary

| | | | |
|--|-------------|--|--|
| <p>Orientation: Dr. Leila Thackston</p> <p>Key Contact: Dean Carillo, Recruiter, Maple City Hospital 519-222-2222</p> | | | |
| Monday | 0900 | Medical Affairs, Administration Orientation Jenny Walker, Medical Affairs | Park in Doctors lot and go to the Admissions desk at Maple City Hospital |
| | 1100 | Tour of Hospital Jenny Walker, Medical Affairs | Maple City Hospital |
| | 1200 | Lunch with CEO – John James Chief Nursing Officer – Simone Millstone Administration Director – Tiffany Williams Chief of Staff - Dr. Bill Cohen | Charlie's Cafe |
| | 1400 | Meet with Dr. Meredith Daynard, your assigned mentor. Discuss the overall strategy of the Physician Mentorship program. | Administration Meeting Room 352B |
| | 1500 | Social gathering - spouse, family, and yourself. Dr. Dave Kline and Mrs. Tracy Kline Medical community welcome. | Administration, Meeting room 121A |
| Tuesday | 0900 | Clinic orientation Billing, patient bookings and referrals | Administrative Assistant – Mark Monroe Clinic Manager – Erin Dow |
| | 1300 | See patients in clinic | |
| Friday | 0800 | Check in with Sandie Lindell, Recruiter | Your office |

Sample Media Release Template

[Release Date]

Headline about Physician Joining the Community

Lead: Organization announcing it has recruited a physician.

Paragraph that mentions the physician's specialty and when he or she started working at the local hospital/clinic.

Paragraph that explains the need for the recruit is (e.g. a shortage of physicians in a particular specialty).

Quote from the Chief of Staff or CEO about the positive impact the recruit will have on delivery of patient care and/or how well the physician has integrated into the team.

Paragraph that highlights where the physician recruit was practising before moving to the community and what motivated the physician to move to the community/Ontario.

Quote from physician about why he or she is excited to join the hospital/practice or community.

Paragraph that describes the recruitment process highlights. When did the recruit first contact the organization? Was a site visit involved? Was a Labour Market Impact Assessment application required? Be sure to mention if another organization collaborated with your organization during the recruitment process.

[Quote from partner organization, if applicable.]

-30-

For further information, please contact:

Contact Name and Title
Organization
Phone Number
Email

HFO Resources

Be sure to let your new physician know about all the HFO resources available to assist with transitioning into practice, finding vacation coverage, and supporting a practice.



Transitioning into Practice

Transition into Practice Service (TiPs)

TiPS provides career-focused information for physicians practising in Ontario. Modules cover a range of topics, including: the business side of medicine, incorporating teaching into your practice, and physician well-being.

HFO Regional Advisors

With regional knowledge through the LHINs as well as a province-wide reach, HFO's Regional Advisors can connect you with the resources when you need them. healthforceontario.ca/ra



Finding Vacation Coverage

HFOJobs

Post your locum physician opportunities on HFOJobs.ca, Ontario's most widely used physician job-board, for free. If you are new to using the site, the HFOJobs support team will help you navigate the site quickly and provide best practices for posting a position.

Rural Family Medicine Locum Program

The Rural Family Medicine Locum Program (RFMLP) provides temporary short-term replacement coverage for practising rural family physicians in eligible communities in Ontario. healthforceontario.ca/rfmlp

Northern Specialist Locum Programs

The Northern Specialist Locum Programs (NSLP) provide respite and vacancy locum coverage to eligible communities/specialties through two programs: The Urgent Locum Tenens Program and the Respite Locum Tenens Program. healthforceontario.ca/nslp

HFO Resources cont'd...



Supporting a Practice

HFO Regional Advisor

Your Regional Advisor will link you with resources and partners; share best practices, and assist with physician recruitment and retention.

healthforceontario.ca/ra

Physician Assistant Career Start Program

A PA enables a physician to see more patients and focus on high-acuity patients. The Physician Assistant Career Start Program provides time-limited financial support to facilitate the transition of Ontario PA graduates into the health-care system. healthforceontario.ca/pa

For more information, contact: practiceontario@healthforceontario.ca

Tel: 1-800-596-4046 option 5 | Tel: 416-862-2200 option 5

LHIN Resources



Health Care Connect

Health Care Connect refers Ontarians who don't have a physician to a family health-care provider who may be accepting new patients. Local Care Connectors work closely with you to understand your practice and your ability to take on new patients. Contact your LHIN to become part of Health Care Connect.

<http://www.health.gov.on.ca/en/ms/healthcareconnect/pro>

LHIN Clinical Leads

The LHIN Clinical Leads may also provide regional support systems and resources to assist physicians practising in their LHIN. See the [LHIN websites](#) for details.