

## USA Health Physician Recruitment and Onboarding Checklist

### Office of Faculty Affairs

Progress towards completion of appointment steps can be found on the COM Checklist System:

<https://jagasp.usouthal.edu/healthsciences/logon.aspx>

	TASKS:	COMPLETED BY:
	<b>The recruitment process</b>	
<input type="checkbox"/>	Identify proposed physician recruitment requirement	Chair/Senior leadership
<input type="checkbox"/>	Complete Recruitment Breakeven Analysis Form and Authorization for Recruitment Form Attach advertisement Get approval signatures (Department Chair, Bailey, Marymont) – OFA will route form after chair signs OFA who will provide Credentialing with a copy	AA/PD
<input type="checkbox"/>	OFA generates on-line position posting in USA Neogov and notifies department	OFA
<input type="checkbox"/>	Advertising MUST be completed before interviews OFA posts advertisement on-line to COM web and Higher Ed Jobs Department can add other advertisements to discipline-specific journals/sites All ads MUST include link to on-line application site (which is provided by OFA) NOTE: Minimum of 1 additional national advertisement is required for tenure-track positions	OFA/AA/PD
<input type="checkbox"/>	Candidates MUST apply via USA Neogov and upload current CV	Candidate
<input type="checkbox"/>	Neogov applications forwarded to Chair	OFA
<input type="checkbox"/>	Review of applications; identify Candidates for interview	Chair/AA/PD
<input type="checkbox"/>	Make travel arrangements for Candidates and schedule interviews/generate itinerary Provide separate escort and visit logistics support for spouse if needed Department must provide the following information to OFA: copies of additional ads posted, composition of search committee, and dates of interviews	Chair/Department
<input type="checkbox"/>	Collect Interview evaluations on Candidate from interview panel	AA/PD
<input type="checkbox"/>	Select Candidate for the position; prepare offer letter using OFA template – OFA routes offer letter for signatures once chair generates letter. Offer letter must be approved by Dr. Marymont and Owen Bailey <b><i>Proposed start date must be no sooner than 3 months from the date of offer</i></b>	Chair
<input type="checkbox"/>	Receive accepted offer letter from Candidate; Copy must be provided to OFA upon receipt	AA/PD
<input type="checkbox"/>	OFA picks up credentialing/hospital privileges packet and sends welcome letter/packet to Candidate Letter from OFA to Candidate includes the following: Official transcripts Background check Credentialing: Provider Credentialing, Med Staff Privileges, Malpractice Insurance	OFA/Credentialing
<input type="checkbox"/>	FCAPE review (required for appointments at Associate Professor or Professor ranks)	OFA
<input type="checkbox"/>	Complete Affirmative Action Report	OFA
	<b>Tasks re: credentialing and the appointment packet – initiate on receipt of signed offer letter – at least 3 months prior to start date</b>	
<input type="checkbox"/>	Initiate development of contract and incentive addendum (if applicable). AA/PD will complete Physician Employment Agreement Data Sheet. Brian Norris' office will generate contract draft. Legal must approve contract. OFA reviews contract and routes contracts for signatures. Original contract will be returned to department and a copy will be scanned to Brian Norris' office.	Administrator for Ambulatory Services/OFA/Legal
<input type="checkbox"/>	When Candidates require visas of any sort: Time to issue visas may delay start dates – 6 months or more may be required depending on visa type Discuss Candidate with University International Affairs and Immigration	OFA
<input type="checkbox"/>	OFA contacts Candidate to confirm receipt of package and answer questions	OFA
<input type="checkbox"/>	Request Chair's letter and signed Faculty Action Form (OFA will obtain faculty signature on form)	OFA
<input type="checkbox"/>	Request three recommendation letters for faculty appointment Letters (on letterhead/signed) can be emailed to USA and forwarded to OFA If letters received by mail, originals should be forwarded to OFA	OFA
<input type="checkbox"/>	Request official transcripts for ALL undergraduate/graduate education Transcripts must be issued to USA	Candidate
<input type="checkbox"/>	Contact COM Business Office for BPN (Business office copies OFA on email assigning BPN)	AA/PD
	<b>Faculty appointment – <u>must</u> be completed at least 6 weeks prior to the official start date</b>	

<input type="checkbox"/>	Receipt of ALL required documents Signed Authorization to Recruit Copies of any advertisements by Department USA Employment Application (from Neogov) and CV Signed offer letter and contract Transcripts Letters of recommendation Completion of credentialing (background results complete and email from Risk Management received) Chair's letter Faculty Action Form	OFA
<input type="checkbox"/>	Submit completed PA to COM Business Office	AA/PD
<input type="checkbox"/>	Routing of completed packet for approvals	OFA
<input type="checkbox"/>	President's letter issued - this letter must specify the official start date	COM Business Office
<input type="checkbox"/>	President's letter sent to Candidate	OFA
<input type="checkbox"/>	Candidate signs and returns President's letter Completion of the appointment process  NOTE – OFA cannot verify employment with lenders until the appointment process is complete.	Candidate
<b>Preparation for onboarding of new faculty – begin <u>after</u> receipt of official appointment – i.e., 4-6 weeks prior to official start date</b>		
<input type="checkbox"/>	Obtain "Jag Account Number"; Complete Banner detail.	COM Business Office
<input type="checkbox"/>	Route signed PA form, signed President's letter, and employee information forms to Human Resources	COM Business Office
<input type="checkbox"/>	Department sets up for new faculty Order lab coats Office set up – <i>computer, telephone, business cards, keys, etc.</i>	Department
<input type="checkbox"/>	Set up meeting for new faculty with clinical operations supervisor/manager <i>Set up clinic schedule, template, staffing and supply/equipment needs</i>	Department
<input type="checkbox"/>	Set up meeting for new faculty with Public Relations (in person or via telephone) <i>Get picture made for website, info added to website, press release, etc.</i>	Department
<input type="checkbox"/>	Schedule new faculty orientation and Human Resources benefits meeting	OFA
<input type="checkbox"/>	Setup New Provider Orientation with Compliance (Elizabeth Will - 251-471-7836)	Department
<input type="checkbox"/>	Complete and submit Computer Information Services (CIS) packet <i>Secretary will need Jag Account # and will make email account request through Computer Services</i>	Department
<b>Onboarding - first day of employment</b>		
<input type="checkbox"/>	OFA welcome and orientation New employee orientation Meet with benefits counselor in HR University Badge Completion of I-9 form Complete federal and state withholding forms (W-4s) and direct deposit form and return forms and supporting documents to Payroll. Campus parking pass (if desired)	OFA
<input type="checkbox"/>	Set up dictation for both clinic (Secretary) and hospital (Medical Records) settings Make sure login and passwords are set up for all information technology needs Issue pager Schedule compliance/billing in-service Obtain appropriate hospital badge Obtain parking passes for hospitals/clinics/Strada Patient Center (if applicable)	Department