**Employee Onboarding & Credentialing Checklist**

Prepared For: [Enter your client name here]

Completed By: [enter your team name here]

**www.yourwebsite.com**

**Email: you@yourwebsite.com**

**Phone: your\_phone\_number**

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# Disclaimer

This **Employee Onboarding & Credentialing Checklist** is a **general framework** designed for **healthcare organizations** to ensure proper onboarding, regulatory compliance, and credential verification. This document does **not** constitute legal advice and should be tailored to align with **healthcare industry regulations, Ontario labor laws, and accreditation standards**. Employers should ensure compliance with **Ontario Employment Standards Act (ESA), Occupational Health and Safety Act (OHSA), Personal Health Information Protection Act (PHIPA), and other healthcare-specific regulatory bodies**.

# How to Use This Document

This checklist serves as a **step-by-step guide** for onboarding and credentialing new healthcare employees. Employers should:

* **Customize onboarding steps** based on the specific role (nurse, physician, administrative staff, etc.).
* **Ensure credentialing compliance** with healthcare licensing authorities.
* **Standardize onboarding** to improve retention and employee satisfaction.
* **Conduct regular audits** to verify compliance with health and safety regulations.
* **Document all steps** to maintain regulatory compliance and accreditation.

# Introduction

At **[Healthcare Facility Name]**, we prioritize quality patient care and regulatory compliance. This **Employee Onboarding & Credentialing Checklist** ensures that all healthcare personnel meet the required licensing, background verification, training, and professional standards before assuming their roles.

This checklist covers **pre-employment credential verification, structured onboarding, compliance training, and performance tracking**.

# Purpose & Scope

This document applies to **all new hires in the healthcare sector, including clinical and non-clinical staff. The objectives of this checklist are to:**

* Ensure credentialing verification before employment begins.
* Standardize the onboarding process for healthcare personnel.
* Maintain compliance with provincial and federal healthcare regulations.
* Provide a structured training plan for new employees.
* Track performance and competency development during the probation period.

# Pre-Employment Credentialing & Compliance

Before a new hire begins work, the following **credentialing and verification steps** must be completed:

* **License & Certification Verification** – Confirm active registration with Ontario College of Nurses, CPSO, or other relevant regulatory bodies.
* **Background & Criminal Record Check** – Ensure compliance with healthcare screening laws.
* **Immunization & Health Screening** – Validate immunization records, TB tests, and COVID-19 vaccination (if applicable).
* **Professional References** – Verify past employment and professional reputation.
* **Confidentiality & PHIPA Agreement** – Ensure the employee signs a Personal Health Information Protection Agreement.
* **WSIB & Workplace Safety Training** – Provide workers' compensation registration and safety protocols.

# Onboarding Process

## A. Day 1 Orientation

**Welcome Package** – Provide an introduction to workplace culture, mission, and values.

**Review Employee Handbook** – Explain workplace policies, dress code, and patient confidentiality.

**Facility Tour** – Familiarize employees with workstations, emergency exits, and safety equipment.

**IT & System Access Setup** – Assign login credentials for electronic health records **(EHRs)**, scheduling systems, and communication platforms.

**Emergency Response Training** – Conduct fire drill procedures, first-aid training, and workplace hazard assessments.

## B. First Week Training & Compliance

**OHSA & Infection Control Training** – Educate on proper **PPE** usage, hand hygiene, and biohazard disposal.

**Patient Confidentiality & PHIPA Compliance** – Reinforce privacy laws and handling of medical records.

**Role-Specific Competency Training** – Provide job-specific education (e.g., bedside care for nurses, administrative workflows for office staff).

**Workplace Harassment & Violence Prevention Training** – Ensure compliance with Ontario’s Health & Safety Act requirements.

## C. 30-60-90 Day Performance Checkpoints

**30-Day Review:** Assess initial competency, engagement, and adherence to patient care standards.

**60-Day Check-In:** Identify additional training needs and performance improvement areas.

**90-Day Final Evaluation:** Confirm role readiness and long-term employment fit.

# Regulatory Compliance & Documentation

Healthcare employers must maintain proper documentation of all credentialing and onboarding processes. Required documents include:

* Signed Employment Agreement & Offer Letter
* License & Certification Verification Records
* **Background Check & Health Screening Reports**
* PHIPA Confidentiality Agreement
* Workplace Safety & Harassment Training Completion Certificates  
  30-60-90 Day Performance Evaluation Forms

These records should be **securely stored** and accessible for **audit and accreditation reviews**.

# Acknowledgment & Agreement

I, **[Employee Name]**, acknowledge that I have read, understood, and completed the **Employee Onboarding & Credentialing Checklist** for [Healthcare Facility Name]. I understand that compliance with **credentialing, patient privacy, and workplace safety** is a condition of employment.

**Employee Signature:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**HR Representative Signature:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# Final Notes

This checklist is designed to ensure compliance with healthcare regulations, workplace safety, and operational efficiency. Employers should customize this document based on their specific healthcare facility requirements and regulatory obligations.

**Please delete the last page once you are done.**

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**Contact Us:**

**Email:** [contact@prosupporthr.ca](mailto:contact@prosupporthr.ca)

**Phone:** 289-628-1484

**Website:** <https://prosupporthr.ca>

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