

Physician Onboarding Using ClickUp

Run physician onboarding in ClickUp. Track credentialing, IT access, and training in one workspace so new physicians are ready to practice on day one.



L5 Team

December 1, 2023

Onboarding physicians using ClickUp can help streamline the process and ensure a smooth transition for new physicians joining your organization. ClickUp is a powerful project management and collaboration tool that L5 can adapt to support various workflows, including physician onboarding.

Step-by-step guide on how L5 can build workflows in ClickUp to onboard physicians

1. Create a Space

Start by creating a space dedicated to physician onboarding. This space will contain all the relevant tasks, documents, and discussions related to onboarding new physicians.

2. Create a Template

Develop a physician onboarding template that includes all the necessary steps, documents, and milestones. ClickUp allows you to easily create task templates to replicate the onboarding process for each new physician.

3. Define Tasks and Subtasks

Break down the onboarding process into individual tasks and subtasks. For example, duties may include "Completing paperwork," "Obtaining a medical license," "Attending orientation," and so on. L5 can build more granular activities within each task based on your specific workflows.

4. Set Due Dates and Priorities

Assign appropriate due dates and priorities to each task to ensure the onboarding process stays on track. ClickUp allows you to set deadlines, add reminders, and visualize task timelines.

5. Assign Responsibilities

Typically, onboarding physicians is a multi-functional endeavor. Those involved could include HR personnel, department heads, or mentors for the new physicians. Team members responsible for overseeing different aspects of the onboarding process need to be aware of the progress of dependencies.

6. Add Task Descriptions and Attachments

Provide detailed instructions and resources within each task. You can add descriptions, guidelines, and relevant attachments such as forms, policies, and training materials.

7. Utilize Checklists

Use checklists to outline specific action items within each task or subtask. Checklists help ensure necessary steps are tracked during the onboarding process.

8. Track Progress

Monitor the progress of each physician's onboarding by updating task statuses regularly. ClickUp provides visual indicators, such as task progress bars, to give you an overview of how far along each physician is in the onboarding process.

9. Communication and Collaboration

Utilize ClickUp's built-in communication features to facilitate collaboration among team members. You can leave comments, tag relevant individuals, and have discussions within tasks to keep everyone in the loop.

0. Automate Workflows (Optional)

ClickUp offers automation features that can further streamline the onboarding process. For example, you can set up automatic task assignments, reminders, or notifications to trigger when specific conditions occur.

By following these steps, you can effectively onboard physicians using ClickUp. Remember to customize the process to fit your organization's specific needs and adapt it as necessary. ClickUp's flexibility and versatility make it a valuable tool for managing complex workflows like physician onboarding.