Pharmacist onboarding and integration checklist

*Use this checklist to guide the onboarding and integration process. Share a copy with the pharmacist, the clinic supervisor and any staff members who will assist with training. This list is not exhaustive, so be sure to review and adapt to fit your organization’s hiring policies and procedures and state law requirements.*

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| **Task** | **[ X ] Completed** |
| Prior to start date/first day  |
| **Pharmacist tasks:** |  |
| Provide verification of state pharmacist licensure  |  |
| Provide verification of tuberculosis skin testing if required by the clinic |  |
| Provide verification of immunizations if required by the clinic |  |
| Provide verification of Basic Life Support (BLS) / cardiopulmonary resuscitation (CPR) certification, if required  |  |
| Obtain stethoscope |  |
| Sign collaborative practice agreement, if applicable  |  |
| **Items to discuss with clinic supervisor:**  |  |
| Clinic history, mission, vision, values and patient population served  |  |
| Clinic hours and recommended work hours  |  |
| Building access (keys, badge access) and parking  |  |
| ID badge  |  |
| Pager or clinic phone  |  |
| Computer access, electronic health record access  |  |
| Required training (e.g., electronic health record, bloodborne pathogens) |  |
| Office space/desk space (computer, printer, copier, fax machine, phone and Internet access) |  |
| Clinic exam room space (blood pressure cuff, table, seating for patient, guest and pharmacist) |  |
| Location of breakroom, bathroom and office and clinic supplies  |  |
| Time off, sick days (who to notify, how to close clinic schedule and who covers)  |  |
| Orientation period (one to two weeks)  |
| **Items to discuss with clinic supervisor and staff:**  |  |
| Clinic organizational chart and staff directory (phone/pager numbers) |  |
| “Who do I go to if…” (triaging patient phone calls and patient requests) |  |
| Process for patient referrals  |  |
| Process for patient scheduling (clinic visits, phone visits, telemedicine, no-shows, reminder calls and who adds patients to pharmacist schedule) |  |
| Late arrival policy  |  |
| Notification of patient arrival and patient rooming |  |
| Performing patient vital signs (who, where) |  |
| Point-of-care testing (e.g., hemoglobin A1c) |  |
| Clerical duties (filing, mailing patient letters) |  |
| Maintaining and ordering supplies and educational materials  |  |
| Documentation of patient care (clinic visit, phone visit and note templates) |  |
| Ordering labs and following up on results  |  |
| Sending prescriptions and responding to refill requests  |  |
| Billing for patient care encounters  |  |
| Triaging patients (e.g., hypo/hyperglycemia, elevated blood pressure, complaints outside of pharmacist scope of practice) |  |

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| **Task** | **[ X ] Completed** |
| Integration period (first three months)  |
| **Gaining familiarity with the practice setting:** |
| Introduction of pharmacist to staff, explanation of the role of the pharmacist in the clinic |  |
| Shadowing providers and clinic staff (i.e. nurses, medical assistants, care managers, clerical staff, billing staff) |  |
| Review clinic contact information and how to make outgoing phone calls |  |
| Determine preferred method of communication with clinic staff  |  |
| Review clinic process for patient returned calls to the pharmacist (electronic health record message, page, phone call, etc.) |  |
| Review of manual blood pressure measurement (if needed) |  |
| Locate demonstration devices in clinic |  |
| Identify sources of population health data to build patient panel  |  |
| Identify someone from the clinic to assist with patient outreach for pharmacist services |  |
| **Understanding the electronic health record, work flow and processes:** |
| Know items required to open and close a visit (Reason for Visit, Documentation, Level of Service and Follow-Up) |  |
| Review how to update the medication list, allergies list and problem list |  |
| Review how to enter vitals |  |
| Review how to enter and complete referrals |  |
| Know how to order glucometer and testing supplies through a pharmacy and/or medical supply company  |  |
| Know how to send in electronic prescriptions or print off paper prescriptions |  |
| Know how to enter an order for labs |  |
| Know how to document a note |  |
| Know how to enter level of service/billing information |  |
| Review process for sending notes to providers |  |
| Know how to create a template in the electronic health record  |  |
| Know how to run reports  |  |

Example provided courtesy of Michigan Pharmacists Transforming Care & Quality (MPTCQ) and Blue Cross® Blue Shield® of Michigan.

Source: *AMA. Practice transformation series: maximizing the role of a pharmacist in your practice. 2017.*