HQBC
HEALTH QUALITY BC

Team-Based Care: Orientation Checklist

When forming a new team and/or integrating a new team member, it is important to provide a proper orientation to the team's space, processes, and procedures.

Team leaders may adapt this sample orientation checklist for their own team or clinic and use it when onboarding new team members.

General Building | Clinic Space	Completed
Parking	
Staff kitchen / Staff storage	
Dress code / Scrub location and sizing (if needed)	
The flow of the clinic – from client registration to rooming patients	
Review administrative space: for charting, research, meetings, other admin	
Review clinical space: lights, equipment, supplies, safety, room booking/scheduling	
Clinic Safety Features	**Completed**
Emergency spill kit / eye wash stations / deluge shower (if available) / emergency procedures / PPE location and policy / resuscitation cart(s)	
Safety features: security, alarm, fire safety & emergency exits, etc.	
Other	

Access: Technology, Equipment, Supplies	Completed
Computer access and log in	
Electronic Medical Record (EMR) access and training	
Phone, text, apps or other communication methods used by clinic	

Review privacy policies	
Scheduling processes: sick calls, staff schedules, leaves	
Supplies orientation: administrative, medical/clinical	
Billing number training (if needed)	
Pharmanet : Pharmanet enrolment instructions	
Point of care testing procedures: i.e. urinalysis, swabs, documentation, calibration	
Soiled equipment, safe disposal, hazardous materials, etc.	
Other	

Staff Team Building	Completed
Create and review a Team Agreement and post in a visible location	
Team communication: Review how, where and when you will communicate Huddles: EMR: Other:	
Staff introductions: book job shadowing time, establish communication, learn about each other's roles	
Staff meeting schedule: review clinical and office leadership, human resources processes	

Visit teambasedcarebc.ca for more resources to support your team-based care journey