

# Medical Courier Onboarding Checklist

## #1. Pre-Onboarding Documentation

- **Review Job Description:** Familiarize the courier with all essential responsibilities, expectations, and operational standards for handling medical deliveries.
- **Complete Background Check:** Verify driver's license, driving history, and conduct background screenings as required by the company or regulatory body.
- **Medical and Drug Testing:** Ensure the courier passes any required medical examinations or drug testing, if applicable.

## #2. Essential Training and Certifications

- **Basic Health & Safety Training:** Cover standard health and safety protocols, especially for handling potentially hazardous materials.
- **Bloodborne Pathogen Training:** Train the courier on how to handle and transport biological specimens safely.
- **OSHA Compliance Training:** Provide Occupational Safety and Health Administration (OSHA) guidelines specific to medical transport.
- **PHI and HIPAA Compliance:** Review procedures for handling Protected Health Information (PHI) in compliance with HIPAA regulations to protect patient confidentiality.

## #3. Vehicle Orientation

- **Vehicle Inspection and Maintenance:** Instruct the courier on routine inspection and maintenance procedures for the delivery vehicle, including refrigeration checks if applicable.
- **Temperature Control Training:** Teach the courier how to operate and monitor temperature control systems within the vehicle to prevent spoilage of temperature-sensitive items.
- **Loading/Unloading Safety:** Explain proper techniques for safely loading and unloading fragile or sensitive items.

## #4. Route Planning and Navigation

- **Training on Route Optimization Tools:** Introduce navigation tools, GPS systems, and apps for route optimization specific to medical courier deliveries.
- **Understanding Traffic Patterns:** Provide information on high-traffic areas and best practices for timely deliveries.
- **Emergency Route Planning:** Develop alternative routes for urgent deliveries or in case of road closures or emergencies.

## #5. Operational Protocols

- **Documentation and Record Keeping:** Review procedures for completing delivery logs, tracking miles, and recording chain of custody for high-value or regulated items.
- **Handling Specimens and Medical Supplies:** Explain specific procedures for handling, storing, and transporting lab specimens, medical supplies, and prescription drugs.
- **Package Verification Procedures:** Teach the courier to verify package contents against delivery paperwork to ensure accuracy.

## #6. Emergency and Incident Management

- **Spill and Accident Protocol:** Review steps for handling spills, exposure to hazardous materials, or accidents, including proper cleanup and reporting.
- **Communication During Emergencies:** Explain the protocol for contacting dispatch or medical facilities in the event of an emergency during a delivery.
- **Incident Reporting Procedures:** Ensure the courier understands how to report incidents, including delivery delays, vehicle breakdowns, and safety breaches.

## #7. Customer Service Expectations

- **Professionalism and Communication:** Train on proper communication skills and maintaining a professional demeanor with medical staff and clients.
- **Patient Privacy and Respect:** Reinforce the importance of maintaining confidentiality and respect when interacting with patients or handling patient-related deliveries.
- **Timeliness and Reliability:** Emphasize the importance of timely deliveries and adhering to scheduled drop-off times for critical medical supplies.

## #8. Technology and Tracking Systems

- **Delivery Management System Training:** Provide training on any delivery management systems, mobile apps, or software used to track and confirm deliveries.
- **Using Tracking and Scanning Devices:** Train on using scanners, barcodes, and tracking devices to confirm pickups and deliveries in real-time.
- **Receiving Notifications and Alerts:** Review procedures for receiving notifications and alerts about delivery changes or urgent requests.

## #9. Post-Delivery Responsibilities

- **Review Chain of Custody:** Ensure the courier follows procedures for documenting and signing off on sensitive or regulated items.
- **Debriefing with Dispatch:** Train the courier to communicate with dispatch or supervisors after deliveries, reporting any delays, issues, or incidents.

- **Vehicle Cleanliness and Maintenance:** Review steps for cleaning and maintaining the delivery vehicle, especially for sanitizing after transporting biological specimens or other medical items.

## #10. Evaluation and Feedback

- **Performance Assessment:** Conduct a performance evaluation after the first month to address any areas for improvement or additional training needs.
- **Collect Feedback from Medical Staff/Clients:** Gather feedback from clients or medical facility staff on the courier's performance, communication, and service quality.
- **Ongoing Training Opportunities:** Schedule follow-up training sessions as needed for skill refreshers, updates on new protocols, or advancements in medical courier services.

This **Medical Courier Onboarding Checklist** helps ensure that new couriers are fully prepared for their role, supporting both compliance and safety in their essential deliveries.