consultpro

CHECKLIST TEMPLATE

Visiting Consultant Onboarding Checklist

A ready-to-use checklist for onboarding a visiting consultant, from KYC and PAN to fee mapping, TDS setup, and the first-month review.

Onboarding is where disputes are prevented

Almost every consultant complaint traces back to something that was never agreed at the start: the exact fee, when payouts happen, who handles TDS, or which collection figure the fee is based on. Work through every box below before the consultant sees the first patient.

Consultant name: _____ **Speciality:** _____ **Start date:** _____

KYC, PAN and agreement

- [ ] Valid PAN collected and verified (before any payment).
- [ ] Bank account details captured and verified for payouts.
- [ ] Medical registration and qualification proof on file.
- [ ] Signed agreement stating fee model, calculation, and payout cycle.
- [ ] Contact details and communication preferences recorded.

Fee model and schedule setup

- [ ] Fee schedule configured live in the system (per-visit, per-procedure, or percentage).
- [ ] Threshold, minimum, or slab entered where the model requires it.
- [ ] Package and surgery split rules mapped, if applicable.

Access, scheduling and credentialing

- [ ] Read-only access granted to the consultant's own visits and collections.
- [ ] Schedule and visit days set up.
- [ ] Credentialing confirmed so visits bill under the correct entity.

TDS and payout setup

- [ ] TDS treatment confirmed: 10% under Section 194J once annual fees cross ₹30,000.
- [ ] Any Section 197 lower-deduction certificate recorded with rate and validity.
- [ ] Payout cycle and cut-off date set and communicated.
- [ ] Responsibility for issuing quarterly Form 16A confirmed in writing.

First-month review

- [ ] First payout statement walked through with the consultant.
- [ ] Fee calculation confirmed against the signed agreement.
- [ ] TDS deduction shown and explained.
- [ ] Any misunderstanding corrected before the second payout.

SELF-SERVICE PREVENTS TICKETS

A consultant who can see their own visit and collection data files far fewer support tickets. Read-only visibility is your cheapest dispute-prevention tool.

Onboard consultants in minutes

ConsultPro guides every step from PAN capture and fee mapping to TDS setup and first-visit logging. Start your free 14-day trial at **consultpro.in.net**.

This checklist is general information for hospital teams and is not tax or legal advice.