

ADVENTURES IN MEDICINE

Career & Life Planning

Checklist

Credentialing

Discovery Resource

CL-06



Checklist

Urgent	Task	Duration	Start	Complete	Responsibility	Contact Information	Notes
	ASSEMBLE CREDENTIALING PACKET FOR EACH PHYSICIAN, INCLUDING:						
	Copy of CV						
	Copy of state license						
	Copy of state controlled substance license						
	Copy of Federal DEA						
	Copy of Board certification						
	Copy of ECFMG (if applicable)						
	CME Information						
	Residency / Internship information						
	Malpractice coverage / claims history						
	Hospital privilege information						
	Complete billing forms for each physician, including:						
	Medicare application						
	Medicaid application						
	Blue Cross application						
	Electronic submission applications						
	Create multiple copies of standard credentialing form for each physician						
	CONTRACTS, NEW CONTRACTS						
	Identify current payer mix / reimbursement levels for each physician						
	Obtain copies of all current payer contracts						
	Identify affiliations with IPAs, PHOs						
	Identify need and format for encounter data reporting						
	Identify strategy to address changes in payer mix						
	Analyze reimbursement of current contracts						

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	MARKETING / BUSINESS DEVELOPMENT						
	Develop business / strategic plan						
	Design and order signage						
	Design and order business cards, stationary						
	Compile current patient list for mailing						
	Identify all referral sources (physicians, hospital, IPA, etc) (NOTIFY)						
	Design, approve and mail announcements						
	Develop ads for local publications						
	Implement new patient tracking system						
	Implement patient satisfaction program						
	IS / COMMUNICATIONS						
	Obtain phone numbers and phone lines						
	Purchase or lease phone system / voice mail						
	Coordinate telephone line installation (phones, fax, modems, credit card machines)						
	Identify # of users / site requiring computer access						
	Identify specific software needs (billing, eligibility, internet, office)						
	Identify lab results printer requirements						
	Make recommendation for hardware / software needs						
	Determine network requirements						
	Order closet equipment, dedicated lines, etc.						
	Purchase hardware and software as required						
	Determine printing needs and capabilities						
	Oversee installation of dedicated lines						
	Train staff on phone system use						

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	BILLING & COLLECTIONS						
	Decide on internal / external billing function						
	Create RFP for external billing services, if appropriate						
	Contract with billing service and prepare for conversion						
	Submit Medicare, Medicaid, Blue Cross billing forms						
	Mail correspondence to payers regarding TIN and address						
	Inform IPAs, PHOs of new TIN and address						
	Complete all credentialing applications						
	Obtain copies of all current payer contracts						
	Create reference grid of all contracts and reimbursement						
	Identify CLIA certificate needs						
	Complete fee analysis						
	Set fee schedule						
	Billing forms for outside and Rush practice						
	Create charge ticket(s) for outpatient, inpatient						
	Create ancillary encounter form(s)						
	Print encounter form(s)						
	Create standard registration document and procedure						
	Develop charge batch sheet and procedure						
	Develop daily log sheet and reconciliation procedure						
	Implement standard time of service payment policy						
	Order credit card machine(s)						
	Establish bank account and lock box procedures						
	Develop bank deposit procedure and cash handling procedures						
	Order billing reference books (CPT, ICD-9, HCPCS)						
	Identify need for on-line eligibility verification						

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	BILLING & COLLECTIONS (continuation)						
	Implement collection policy and procedure						
	Implement refund policy and procedure						
	Train staff on billing policies and procedures						
	Identify phone number for patient and payer calls						
	Review any accounts receivable to be converted						
	Identify balances to be adjusted or sent to collections						
	Review patient / insurance demographics to be converted						
	Print final statements and claims from old system						
	Identify month end report requirements (physician productivity, charges, collection ratios, etc.)						
	ACCOUNTING - PAYROLL						
	Implement physician and staff payroll process						
	In-service staff and physicians on processes						
	Make arrangements for direct deposit for employees						
	Establish account with comprehensive payroll service						
	Determine process for tracking / reporting hours						
	ACCOUNTING - ACCOUNTS PAYABLE						
	Establish chart of accounts						
	Establish approval process for purchasing / account payable						
	Train office manager on invoice processing						

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	ACCOUNTING - GENERAL						
	Select accounting software						
	Determine and review reporting process						
	Identify month end billing report requirements						
	Set up general liability insurance						
	Set up petty cash and controls						
	Create / review and implement budget						
	Develop standardized profit and loss statements						
	HUMAN RESOURCES (Determine staff to move)						
	File all regulatory paperwork						
	Set up worker's comp insurance						
	Develop salary and benefit package						
	Obtain health and disability insurance coverage						
	Develop payroll schedule and process						
	Develop system of tracking hours and benefit accruals						
	Complete staffing analysis						
	Prepare job descriptions and performance criteria						
	Select staff						
	Ensure all accrued benefits have been paid out to staff						
	Distribute employment packets to staff						
	Process employment applications						
	Conduct initial meeting to discuss transition						
	Schedule employees for customer service workshop						
	Recruit candidates for any open positions						

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	HEALTH INFORMATION MANAGEMENT						
	Develop filing system and procedures						
	Determine protocol for management and security of record room						
	Review chart components for sign off by physicians (progress notes, problem lists, etc.)						
	Order charts, dividers, labels						
	Order printed materials						
	Identify # of records to be transferred in						
	Identify current active patient base / growth projections						
	Identify purge process for inactive records						
	Identify off-site storage opportunities						
	Develop records transfer policy and procedure						
	Develop procedure for special chart pulls						
	Develop procedures for next day prep						
	Set up transcription services						
	FORMS MANAGEMENT - MISCELLANEOUS						
	Develop appointment reminder cards / form letters						
	Secure and stock insurance disclaimer forms (MSP)						
	Identify and stock appropriate referral forms (if not electronic)						
	Design and stock phone message pads						
	Order prescription pads						
	COMPLIANCE						
	Develop internal compliance plan and training program						
	Identify physician training program requirements						
	Conduct training for staff and physicians						

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	GENERAL OPERATIONS - POLICIES & PROCEDURES						
	New patient registration						
	Registration updates						
	Eligibility / Insurance verification						
	Scheduling						
	Patient flow						
	Ancillary test ordering						
	Completion of charge tickets						
	Charge entry						
	Phone call handling						
	Next day prep						
	Check in						
	Check out						
	Over the counter collections						
	Daily cash reconciliations						
	Encounter form reconciliation						
	Patient confidentiality						
	Security of building						
	Downtime procedures (if computerized)						
	Clinical protocols						
	GENERAL OPERATIONS - SCHEDULING						
	Develop physician scheduling templates						
	Develop physician coverage / call schedule						
	Train staff on practice scheduling protocols						
	Develop process for scheduling changes, information routing						
	Covert existing scheduled patients						

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	GENERAL OPERATIONS - ANCILLARY TESTING						
	Obtain CLIA licensure if appropriate						
	Develop protocols for ancillary testing by payer, plan						
	Create ancillary testing order forms and process of reconciliation						
	Develop protocol for results follow up						
	Develop information card for patients on where/when to call						
	Develop OSHA policies and procedures						
	Practice policies / HIPAA / JCAHO						
	Create fee schedule for in-house testing						
	Identify need for lab results printer						
	FACILITIES MANAGEMENT						
	Obtain office keys and provide to physicians/staff						
	Set up alarm service / obtain codes						
	Install / in-service on alarm system						
	Develop policies and procedures for OSHA compliance						
	Identify parking spaces for physicians / staff						
	Identify need for vending machines, coffee service						
	Order lab coats						
	Order pagers and cell phones						
	Order name badges						
	Order clinical supplies						
	Order general office supplies						
	Order reference books						

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	FACILITY CONTRACTS						
	Housekeeping						
	Maintenance						
	Landscaping						
	Snow removal						
	Lawn maintenance						
	Waste removal - hazardous and general						
	Elevator maintenance						
	Sprinkling system						
	HVAC						
	Fire alarm / extinguishers						
	Security						
	Postage meter						
	Office equipment: copiers, faxes, charge card machines						
	Clinical equipment						
	SPACE BUILDOUT (Equipment requirements)						
	<i>Waiting room</i>						
	Chairs						
	Artwork						
	Brochures						
	Magazine racks						
	Plants						
	Courtesy phone						
	Games, entertainment for children						

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	SPACE BUILDOUT (continuation)						
	<i>Reception (Check In / Out)</i>						
	Built in cabinetry / storage						
	Storage for charts						
	Phone / computer / charge card wiring						
	Literature storage						
	Locked cash drawers						
	Access to copier, fax machine						
	Access to drop safe						
	<i>Financial services</i>						
	Private area for financial counseling						
	Phone / computer wiring						
	File cabinets for storage						
	Access to copier, fax machine						
	<i>Nurses stations</i>						
	Locked drug cabinet						
	Phone / computer wiring						
	Stools						
	Cabinetry and counter top						
	Space for refrigerator						
	Sink						
	<i>Health information management</i>						
	Chart shelves						
	Phone / Computer wiring						
	Work area						
	Chart racks						
	Access to copier, fax machine						

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	SPACE BUILDOUT (continuation)						
	<i>Physicians offices</i>						
	Desk, credenza, bookcase						
	Chair						
	Phone / computer wiring						
	Literature storage						
	Drug sample storage						
	<i>Bathrooms</i>						
	Handicap accessibility						
	Changing table						
	Soap, towel dispensers						
	Storage area						
	<i>Employee lounge / lunchroom</i>						
	Locker						
	Coat closets						
	Table / chairs						
	Refrigerator / microwave						
	Time clock						
	Vending machine						
	Coffee						
	Supply area						
	<i>Ancillary Space Requirements</i>						
	Radiology						
	Lab						
	Procedure room (lighting)						

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	SPACE BUILDOUT (continuation)						
	<i>Signage</i>						
	Exterior						
	Interior						
	Security system / keying						
	RESEARCH						
	IRB Review/approval of reasearch						
	OFF-SITE OFFICES						
	Maintain off - site clinics:						
	Staffing for the off site will require a clinic coordinator and 1-2 LPNs						
	Portable computer with ability to network						
	OTHER REQUIREMENTS						
	2.5 days block time						
	Time needed for minor cases in day surgery						
	Use of data manager for protocols						
	Assistance in contracting and credentialling						
	Malpractice coverage						
	Secretarial assistance for transfer of medical priv.						
	Inpatient beds to handle admissions						