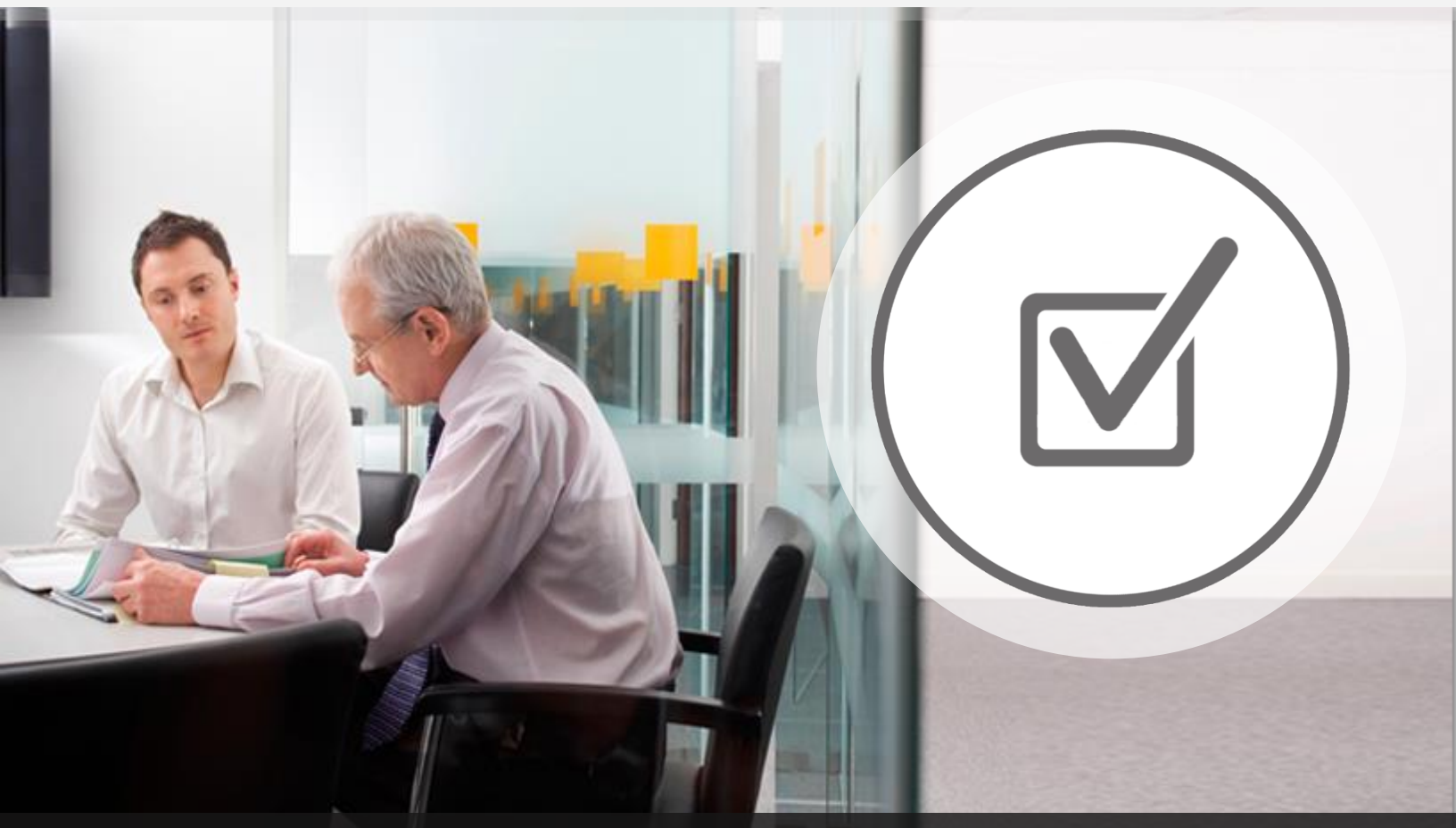


CAREER AND LIFE PLANNING CHECKLIST



AIM

Credentialing Checklist

Credentialing Checklist

Get your credentials
and business in
order!

A physician must be credentialed before he or she can begin receiving insurance reimbursements. Part of the credentialing process is ensuring your business and practices are all in order. This checklist will help ensure that you are properly and officially linked with insurance carriers and government agencies such as Medicare and Medicaid and have essential systems and practices in place.

Objectives:

By the end of this exercise the participant/candidate will be able to:

- Identify, develop and organization information, systems and practices needed to complete the credentialing process.



Credentialing Checklist

How to Use This Tool:

Use this checklist to help you develop a project plan for gathering, organizing, filing and preparing your practice and obtaining your credentials.

Instructions:

Review the checklist and identify critical tasks. Then complete the requisite information and assign completion start and end dates just as you did in the exercises during your job hunt and interview preparations. Use This checklist to monitor your progress and meet your deadlines.

Related Resources:

TITLE	RESOURCE NO.
Pre-Credentialing for Physicians	S-01
Best Practices to Start a Practice	CL-05
Job Transition	ST-10



Credentialing Checklist

Task	Start	Complete	Notes
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 / claim 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			



Credentialing Checklist

Task	Start	Complete	Notes
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			



Credentialing Checklist

Task	Start	Complete	Notes
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			



Credentialing Checklist

Task	Start	Complete	Notes
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			



Credentialing Checklist

Task	Start	Complete	Notes
Billings & 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			

(Billings & Collections continued)



Credentialing Checklist

(Billings & Collections continued)

Task	Start	Complete	Notes
Billings & Collections			
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			
Implement collection policy and procedure			
Implement refund policy and procedure			
Train staff on billing and policies and procedures			

(Billings & Collections continued)



Credentialing Checklist

(Billings & Collections continued)

Task	Start	Complete	Notes
Billings & Collections			
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.)			

Task	Start	Complete	Notes
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			



Credentialing Checklist

Task	Start	Complete	Notes
Accounting / Accounts Payable			
Establish chart of accounts			
Establish approval process for purchasing / account payable			
Train office manager on invoice processing			
Task	Start	Complete	Notes
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			



Credentialing Checklist

Task	Start	Complete	Notes
Human Resources			
File all regulatory paperwork			
Set up worker's comp insurance			
Develop salary and benefit package Obtain health and disability insurance coverage			
Develop system of tracking hours and benefit accruals			
Develop payroll schedule and process			
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			



Credentialing Checklist

Task	Start	Complete	Notes
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			
Task	Start	Complete	Notes
Compliance			
Develop internal compliance plan and training program			
Identify physician training program requirements			
Conduct training for staff and physicians			



Credentialing Checklist

Task	Start	Complete	Notes
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			



Credentialing Checklist

Task	Start	Complete	Notes
General Operations – Policies & Procedures			
Patient confidentiality			
Security of building			
Downtime procedures (if computerized)			
Clinical protocols			

Task	Start	Complete	Notes
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			



Credentialing Checklist

Task	Start	Complete	Notes
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			
Task	Start	Complete	Notes
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			

Credentialing Checklist

Task	Start	Complete	Notes
Facilities 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			
Task	Start	Complete	Notes
Space Buildout			
Waiting room			
Chairs			
Artwork			
Brochures			
Magazine racks			
Plants			
Courtesy phone			
Games, entertainment for children			
Reception (Check In / Out)			
Built in cabinetry / storage			
Storage for charts			
Phone / computer / charge card wiring			
Literature storage			

Credentialing Checklist

Task	Start	Complete	Notes
Space Buildout (Continued)			
Locked cash drawers			
Access to copier, fax machine			
Access to drop safe			
Financial services			
Private area for financial counseling			
Phone / computer wiring			
File cabinets for storage			
Access to copier, fax machine			
Nurses stations			
Locked drug cabinet			
Phone / computer wiring			
Stools			
Cabinetry and counter top			
Space for refrigerator			
Sink			
Health information management			
Chart shelves			
Phone / Computer wiring			
Work area			
Chart racks			
Access to copier, fax machine			
Physicians offices			
Desk, credenza, bookcase			
Chair			
Phone / computer wiring			
Literature storage			
Drug sample storage			

Credentialing Checklist

Task	Start	Complete	Notes
Space Buildout (Continued)			
Bathrooms			
Handicap accessibility			
Changing table			
Soap, towel dispensers			
Storage area			
Employee lounge / lunchroom			
Locker			
Coat closets			
Table / chairs			
Refrigerator / microwave			
Time clock			
Vending machine			
Coffee			
Supply area			
Ancillary Space Requirements			
Radiology			
Lab			
Procedure room (lighting)			
Signage			
Exterior			
Interior			
Security system / keying			
RESEARCH			
IRB Review/approval of research			

Credentialing Checklist

Task	Start	Complete	Notes
Offsite 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			
Task	Start	Complete	Notes
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 credentialing			
Malpractice coverage			
Secretarial assistance for transfer of medical priv.			
Inpatient beds to handle admissions			