



**Preparing for a New Associate
Checklist**

	<u>Responsibility</u>	<u>Completion Date</u>
A. Credentialing:		
1. State licensure application		
a. Obtain	_____	_____
b. Submit	_____	_____
2. DEA or other licensure (state)		
a. Obtain	_____	_____
b. Submit	_____	_____
3. Staff privileges (Hospitals and Surgi-Centers) application(s)		
at: _____		
and _____		
a. Obtain	_____	_____
b. Submit	_____	_____
4. Medicare/Medicaid		
a. Obtain	_____	_____
b. Submit	_____	_____
5. Participating Insurers		
a. Obtain	_____	_____
b. Submit	_____	_____
6. Hospital Staff Committee Appointments		
a. Committee Appointments Desired:		
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
b. Letter to Request Committee Assignments:		
To Be Sent To:		
_____	_____	_____
_____	_____	_____
_____	_____	_____
With Copies To:		
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

B. Third Party Arrangements

1. Medicare

- a. Contact your Medicare representative to add new doctor to your group profile and of solo, convert to group _____

2. Blue Shield (Participating Only)

- a. Contact your Blue Shield representative for:
 - i. An application for a Blue Shield provider number and to your new Associate to your group assignment account. _____
 - ii. Complete and submit. _____

3. Medicaid

- a. Contact the state Medicaid Department for the necessary forms to enroll your Associate as a Medicaid provider and as a member of your practice. _____
- b. Complete and submit. _____

4. Other Third Parties

- a. Notify all third party payors of your new Associate and the date employment begins (including all commercial companies and HMO/PPOs with whom you have agreements). _____
- b. Immediately obtain applications from all third party payors to enroll your new Associate. _____
- c. Immediately begin the credentialing process for the new Associate. _____

<u>List of Payors</u>	<u>Notified Date</u>
_____	_____
_____	_____
_____	_____

C. Insurance Arrangements

1. Malpractice

- a. Shop available insurers to place both your Associate's policies. _____
- b. Re-evaluate corporate coverage _____
- c. Inquire what is needed to protect you (if unincorporated) or your practice entity from your new Associate's malpractice. _____
- d. **Read the policy.** Determine if coverage is provided for
 - i. Acts/omissions of staff under your/your Associate's supervision. _____
 - ii. Acts/omissions of hospital employees under your/your _____
 - iii. Acts/omissions within your hospital administrative roles. _____
 - iv. Allegations of anti-trust violations. _____
 - v. Damages resulting from negligence of a patient where the physician failed to warn (e.g. that the patient should not drive following a visit/procedure, _____

- etc).
 - e. Complete the necessary application for insurance and submit. _____
- 2. Notify casualty and benefit insurers of new Associate and date of employment:
 - a. Office liability insurer _____
 - b. Worker's compensation insurer. _____
 - c. Health insurer _____
 - d. Major Medical insurer _____
 - e. Group disability insurer (depending on who pays premiums) _____
 - f. Group term life insurer _____
 - g. Accounts receivable for insurer (if applicable) _____
 - h. Business interruption (overhead) insurer _____
 - i. Non-owner's automobile liability insurer _____
 - j. General errors and omissions and/or payor fraud-type insurance coverage _____
- 3. Re-evaluate "overhead" insurance effective six (6) months after the new doctor's employment. _____

D. Equipment and Supplies

- 1. Determine special/new equipment needs for Associate
 - a. Shop prices _____
 - b. Order for delivery at least two weeks before Associate's start date _____
- 2. Determine special/new supply needs for Associate:
 - a. Shop; determine if samples available _____
 - b. Order for delivery two weeks before Associate's start date _____
- 3. Determine Associate's office furniture needs:
 - a. Shop _____
 - b. Order for delivery two weeks before Associate's start date _____
- 4. Order beeper, lab coats, dictaphone, hand instruments, etc. for delivery one week before Associate's start date _____
- 5. Determine if office clinical supplies volume on hand should be increased in anticipation of new doctor's likely productivity/supply usage. _____

E. Professional Relations

- 1. Obtain applications for membership, as desirable or needed, in:
 - a. County Medical Society _____
 - b. State Medical Society _____
 - c. National Medical Society _____
 - d. Local Specialty Society _____
 - e. State Specialty Society _____
 - f. National Specialty Society _____
- 2. Complete and submit applications _____
- 3. Determine needed professional journal subscriptions and subscribe. _____
- 4. Arrange call and coverage schedules within group. _____

5. Begin scheduling appointments, lunches, etc. for your new associate with present and potential referral sources and community leaders during Associate's first two to three months. _____
6. Provide your Associate with the names and addresses of local advisors for his/her consideration:
 - Real estate agents _____
 - Real estate attorneys _____
 - Accountants _____
 - Bankers _____
 - Personal Insurance Agents (disability, auto, personal life, etc.) _____
7. Set Associate's first year's goals for productivity, patients seen, attraction of new referral sources and new patients, etc. _____
8. Establish routines to track first year Associate's achievement of goals (will your computer do this?). _____

F. Advisors and Services

1. Notify answering service of new doctor's name, employment date and (local) home phone number. _____
2. Notify practice advisors of new doctor's employment and send a copy of the letter agreement of employment to your:
 - Attorney _____
 - Accountant _____
 - Pension Administrator _____
3. Contact suppliers (particularly drug company representatives) to determine how they might assist you to prepare for the new doctor's arrival. _____

G. Public Relations

1. Compile general mailing lists to announce your new Associate's arrival. Lists to include:
 - a. Active patients
 - b. Inactive patients seen within the last five years
 - c. All area physicians
 - d. All area dentists, optometrists, podiatrists, chiropractors, psychologists, etc.
 - e. All area allied health professionals, including physical therapists, nurses, pharmacists, opticians
 - f. Hospital administrative and nursing staff
 - g. All area health related institution administrators and directors, including nursing homes, clinical laboratories, HMOs, etc.
 - h. All other hospital affiliated physicians and referral sources
 - i. Community business leaders, including bankers, accountants, attorneys, Chamber of Commerce, union leaders, etc.
 - j. Personal friends, including Associate's contacts
2. Draft appropriate announcement letters for each group above. (Be sure your new Associate reviews and approves the draft.) _____

- a. Recite your new Associate's background, any special training, etc. or include a copy of his/her curriculum vitae
 - b. Consider a professionally prepared announcement brochure for enclosure
3. Draft press releases for release to all local newspapers, county/state, medical/specialty journals, etc. to coordinate with Associate's start date.
4. Consider contemporaneous general practice promotional efforts (such as an "open house" etc.) to sequence and complement your new doctor announcements.
5. Consider retaining professional marketing assistance to guide/help the promotional effort.
6. Have letter-announcements offset printed and stuff envelopes. Mail as follows:

Group

- a. - Hospital and area doctors
- Hospital administration
- Nursing staff
- Allied health care professionals
- Health institution directors/administrators
- b. (*one week later*)
- Friends of yours and your Associate's
- Active and inactive patients
- Community business leaders

(Consider marking envelopes "Do Not Forward" so your mailing lists can be updated for future use. This is slightly more expensive.)

7. Revise phone book practice listing and add Associate's name in white pages (if desired) and Yellow/Silver Pages individually and under group name.

H. Office Systems

- 1. Order new stationery, billcards, superbills, business cards, etc. adding your Associate's name.
- 2. Order additional office keys, hospital parking passes, etc. for your Associate.
- 3. Change building directory and office signage.
- 4. Consider altering office/hospital schedules, possibly adding additional office hours.
 - a. If office hours are added, plan an additional notice to active and inactive patients 30 days after the new doctor's employment starts.
 - b. Revamp the office scheduling and staffing to accommodate your Associate: new hours, etc.
 - c. If appropriate, obtain O/R block times, Emergency Room coverage rotation assignments, Heart station reading assignments, or comparable situational rotations, etc.
 - d. Plan night and weekend call schedule

5. Consider additional office staffing needs, recruit, plan adjusted work hours, as necessary. _____
6. Revise office billing and accounting systems to track physician productivity. _____
7. Schedule staff training sessions on:
 - a. new telephone answering verbiage _____
 - b. new scheduling routines _____
 - c. how to shift established patients to your Associate _____
8. Begin to schedule patients for your new Associate (including times when you will not be present). _____
9. Schedule educational sessions for your Associate to address:
 - a. hospital routines _____
 - b. billing systems (office and hospital) _____
 - c. patient, meeting, vacation and other scheduling _____
 - d. office charting routines _____
 - e. procedure and diagnosis coding (CPT/ICD-9) _____

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