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| **Figure 3.2** | **Spreadsheet of Credentialing Process** | | |
| (Note: This process would be used by an organization that also uses a preapplication.) | | | |
| **Preapplication** | **Initial Application** | **Reappointment** | **Post-approval** |
| Preapplication requested for approved category | Applicant green file and red peer review folder created and labeled  Applicant notified appli- cation has been received and informed of any missing or unclear doc- uments or information; applicant and interested parties updated weekly Credentialing software updated, practitioner ID assigned, remaining ver- ifications and IT access request sent  Tracking report updated with date application received  Service line chief notified and basic information about applicant (name, specialty) provided Verification log started and references sent  Second notices to references, etc., after one week  Phone calls to references, etc., after third week | Reappointment report by date range generated in software | Privileges assigned and appointment dates  updated in credentialing software  Contact protocol updated  Applicant and staff noti- fied by email  FPPE letter/forms sent to applicant and service line chief; date noted in software  FPPE assigned to prac-  titioner and FPPE report updated  Appointment letter signed by CEO  Acceptance letter sent to applicant with return envelope and copy of privileges  Return of acceptance  letter tracked; written reminder sent in two weeks |
| Physician development team notified | Color-coded batch fold- ers created and labeled |
| Basic background check completed (e.g., NPDB, OIG, Google, [Hospital] resource list) | Expiration letters gen- erated in software; add expiration date |
| Preapplication packet selected from K drive (the same packet is used for physicians and AHPs) Packet mailed or emailed | Reappointment packets and labels generated in software  Current privileges copied |
| Orange file created and labeled with copy of pre- application cover letter Name added to tracking report on K drive with date requested and date sent  Data entered into creden-  tialing software | New privilege forms (including sedation and cover) printed  Packets with return enve-  lopes mailed six months before appointment expires  Second written notice  mailed one month after initial notice |

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| **Figure 3.2** | **Spreadsheet of Credentialing Process (cont.)** | | |
| **Preapplication** | **Initial Application** | **Reappointment** | **Post-approval** |
| Returned preapp reviewed with director and/or credentials committee chair Application packet selected based on physician or AHP | Reviewed by service line chief when complete with any issues noted  Referred to credentials committee | Final written notice mailed three months after initial notice  Applicants called and emailed two months prior to expiration; second packet sent if needed Quality notified that pro- files will be needed one month prior to credentials committee meeting  Supporting volumes data obtained one month prior to service line chief review  Payment information entered into system under fees/dues  Returned application reviewed and applicant notified of missing items; repeat as needed  Verification log created in software  Verifications sent and  file folder label created to check off as they are returned; additional peer  references for low-volume  providers | Returned letter filed and software updated  Update privilege status to unrestricted once FPPE is complete  Monthly FPPE report for those completing pro- visional status; report issues to credentials committee Reappointment appli- cation filed with one additional two-year cycle in back of file  Audit file  Check NPDB, OIG, and licensure for additional privileges and change in status; obtain approval from service line chief, and send through process |
| Appropriate privileges included | New grads may be re- ferred pending licensure |
| Packet sent by post or FedEx | Referred to governing board |
| White file created and labeled for returned preapp, verifications, and app cover letter  All possible verifications  completed | Referred to board of trustees |
| Credentialing software updated  Tracking report updated  with date preapp received and date application sent |  |

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| **Figure 3.2** | **Spreadsheet of Credentialing Process (cont.)** | | |
| **Preapplication** | **Initial Application** | **Reappointment** | **Post-Approval** |
| Physician development |  | Service line chief and re- |  |
| team updated | view and approval forms |
|  | printed from K drive |
|  | Credentialing database |
|  | updated as indicated by |
|  | corrections on the reap- |
|  | pointment form |
|  | Background information |
|  | obtained (NPDB, OIG, |
|  | FSMB, board certifica- |
|  | tion, med/mal claims |
|  | history, peer referenc- |
|  | es, AMA profile, claims |
|  | history, DEA, quality |
|  | profile, signed privileges, |
|  | volumes data, sedation |
|  | test documentation, |
|  | affiliations, health state- |
|  | ment, all licensure and/or |
|  | certification) |
|  | Completed file reviewed |
|  | by clinical service chief |
|  | with issues noted |
|  | Referred to credentials |
|  | committee |
|  | Referred to medical exec- |
|  | utive committee |
|  | Referred to governing |
|  | board |