

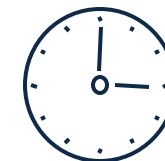


A CHARTIS COMPANY

Practitioner onboarding optimization

On the radar webinar series

May 21, 2026



The webinar will start
at the top of the hour.

MONTHLY INSIGHTS

Webinar schedule & topics

THE 3RD THURSDAY OF EVERY MONTH:

10AM Pacific, 1PM Eastern

MAY

Practitioner onboarding optimization

JUNE

Avoid Root Cause Analysis déjà vu

JULY

Restraint Simplified



On the Radar

Chartis and Greeley explore practical and future-focused topics in quality, regulatory & medical staff.

To see ALL past webinars for streaming or to register for upcoming webinars ... go to

<https://www.greeley.com/insights>



UPCOMING WEBINAR

Purposeful practitioner onboarding: A hospital playbook for success

May 21, 2026

Our team outlines a comprehensive onboarding framework, and highlights leading practices and common challenges while emphasizing the impact of optimized onboarding on practitioner experience, compliance, operational efficiency, and revenue.

[REGISTER NOW](#)

Navigating the Zoom interface

Handouts:

Check the chat function for copies of the slides for note taking and any other handouts.

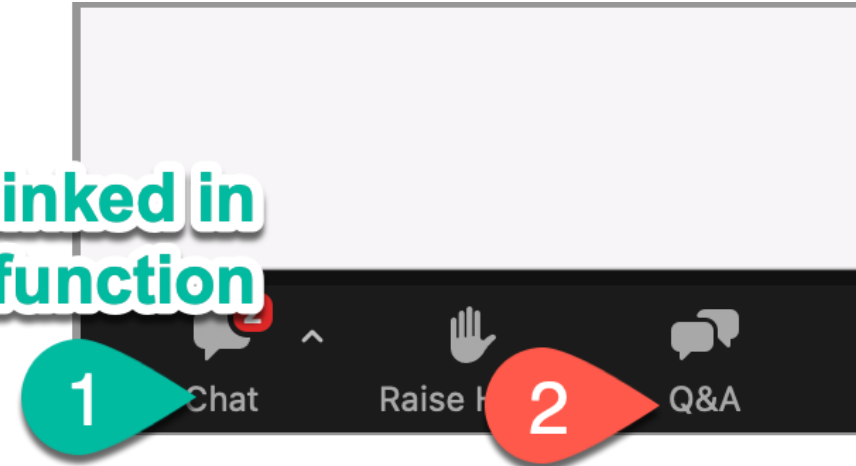
Questions and comments:

Please participate in the discussion by asking question through the Q&A function during the webinar.

There will also be a survey you will receive immediately after the webinar that will give you an opportunity to ask additional questions or make comments.

Any questions not answered during the webinar will be addressed in a follow-up email or posting.

Handouts are linked in the “chat” function

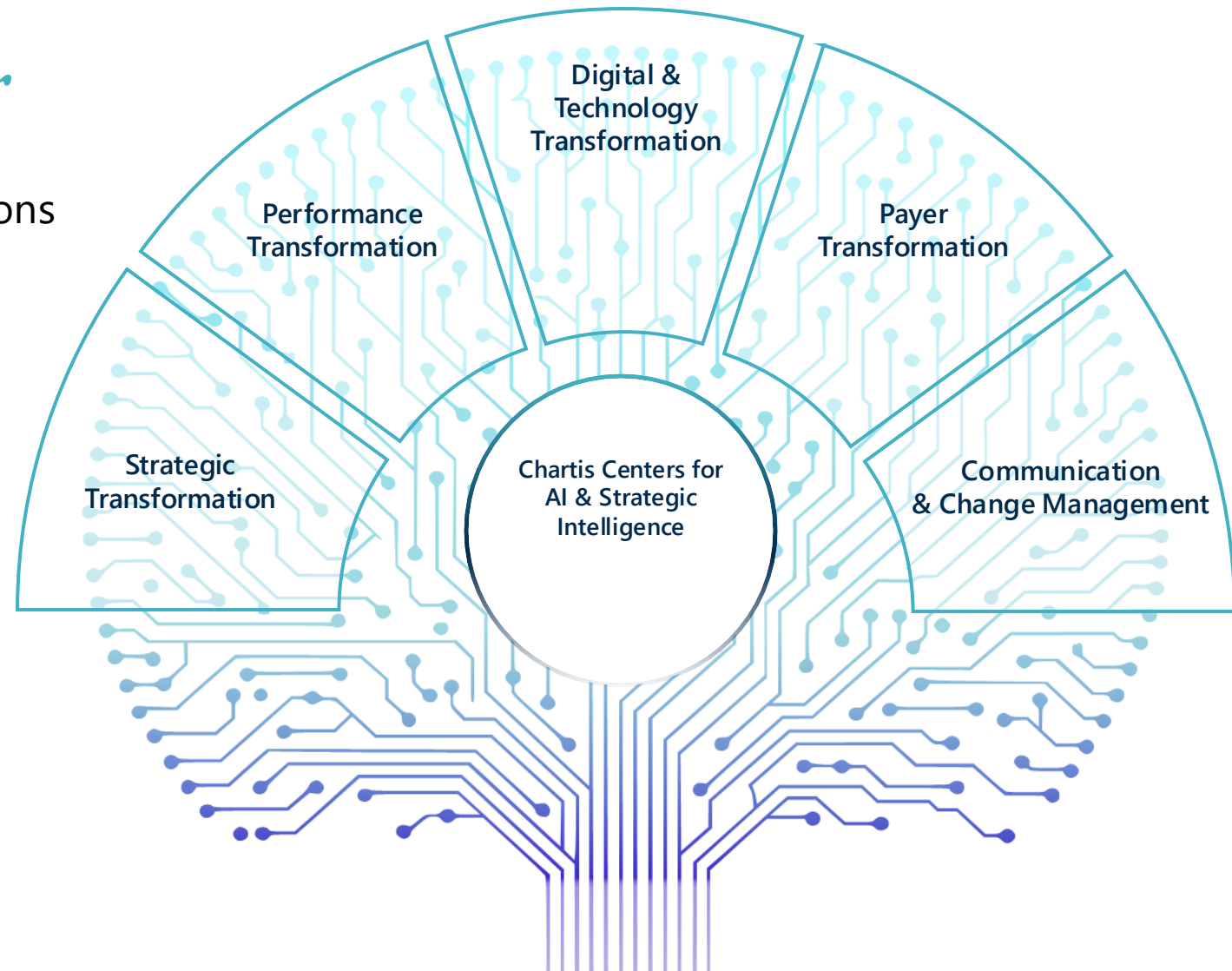


Please ask questions by clicking on “Q&A”

Chartis is a trusted transformation *partner*

Clients trust Chartis to bring integrated solutions that help reshape healthcare for the **better**.

- 1000+ Professionals
- *Mission:* to materially improve healthcare
- Charis acquires Greeley in 2019, became Chartis Clinical Quality Solutions in 2022
- Greeley brand brought back in 2024 to cover Medical Staff Services Related Offerings and now part of Clinical Transformation



High reliability care

UNPARALLELED BREADTH AND DEPTH

Our clients are all striving toward the same goal of providing safe, high-quality care—something that's becoming even more important with the many distractions and disruptions in healthcare today. We help clients achieve their organizational reliability, quality, and safety goals, leading to results in areas that matter most—improved care outcomes, staff engagement, operational stability, and total cost of care, enhanced reputation, and better patient experience.

High Reliability Organization (HRO)

- High reliability organizational design and infrastructure
- Quality, Value, and Performance Improvement
- Quality ratings and rankings optimization
- Patient safety / harm reduction / safety and reliability culture
- Adverse event response and remediation / RCA
- High fidelity measurement / Clinical Documentation Integrity (CDI)
- Care facilitation

Clinical Compliance, Regulatory, and Physical Environment Solutions

- Adverse event response
- Adverse action regulatory response and remediation
- Accrediting body readiness assessment
- Regulatory readiness rehearsal / mock surveys
- Life safety and environment of care assessment
- Policy simplification
- Infection prevention program

Bylaws, Rules and Regulations, and Peer Review

- Bylaws and rules and regulations assessment and redesign
- Peer review assessment and redesign
- Medical staff / medical director structure and governance
- Credentialing, OPPE

External Peer Review

- Physician/advanced practice professional external peer review
- Focused Professional Practice Evaluation (FPPE)
- Ongoing case review in support of OPPE/FPPE
- Medical necessity reviews
- Patient safety/carequality case reviews

MEMBERSHIP AND PROFESSIONAL EDUCATION SERVICES

Today's *discussion*

Introducing a streamlined onboarding framework focused on improving integration, communication, and collaboration across stakeholders.



Justine Spinosi

MBA, CPMSM, CPCS

Senior Consultant, Greeley



Stephanie Russell

BS, CPMSM, CPCS

Senior Consultant, Greeley

Today's *agenda*

Onboarding framework

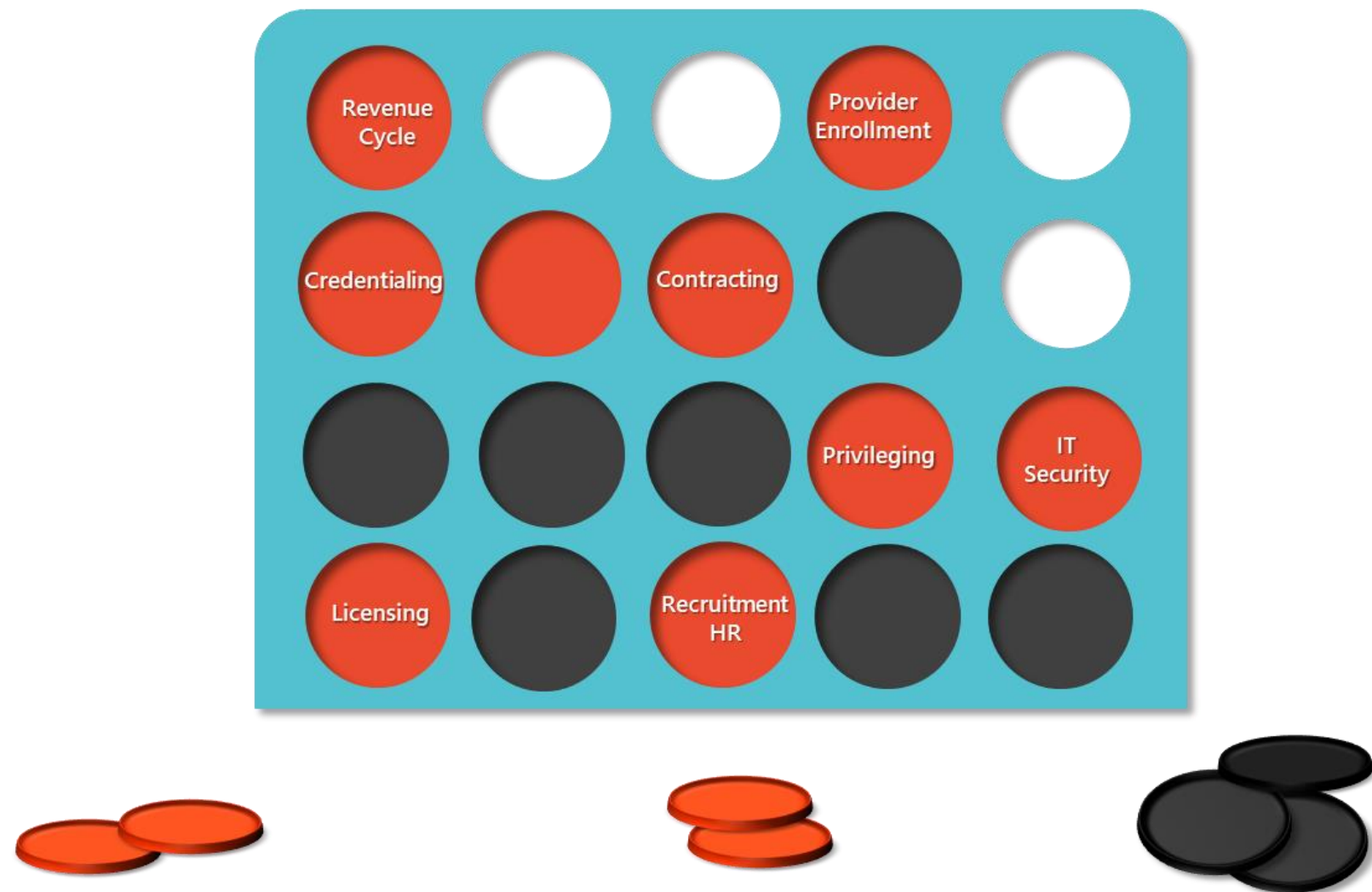
Challenges to achieving an optimized onboarding program

Key steps in the onboarding process

*Questions should be posted in the webinar interface throughout the presentation.
We will respond to any unanswered questions in writing following the webinar.*

Practitioner onboarding optimization

Is this Connect 4 representative of your organization?



Our practitioner onboarding framework

Onboarding leading practice framework



Long-lasting, meaningful impact:

- Accelerated revenue captured with reduced duplication and turnaround times
- Full compliance with external and internal requirements
- Optimization of resources resulting in cost savings
- Increased scalability through integrated workflows
- Creates competitive edge and marketing advantage
- Increased practitioner satisfaction, alliance and retention

Integration Collaboration Communication

Provide an integrated, holistic experience and a systematic onboarding process

- Create a team-based onboarding culture with integrated workflows and accountability
- Leverage technology to track progress through each step of the process creating ongoing communication and sharing documentation
- Create measurable KPI's and robust reporting to support accountability and continuous improvement
- Establish clear communication channels and handoffs

Practitioner experience

Successful onboarding affects practitioner satisfaction, engagement and retention

- Roles and responsibilities are clearly defined
- A single request for all documents to adhere to the stakeholders' protocols
- Orientation is tailored to the specialty area of practice
- Dedicated onboarding concierge to facilitate orientation beginning to end
- Assign an ambassador or peer mentor to boost engagement and reduce turnover risk
- Solicit feedback for continuous improvement and measure practitioner experience
- Follow-up after two (2) weeks and then thirty (30) days post start date to gauge practitioner experience
- Automated system using a single platform that gives the practitioner and all stakeholders access to know where they are in the process

Value realization

A team-based approach to onboarding impacts quality, patient care and return on investment

- Integrated processes reduce turn-around times of initial applications, accelerating patient care and revenue
- A thorough onboarding process improves retention, and increases productivity
- Differentiator in recruiting highly sought-after specialists
- Family support and community integration promotes satisfaction and retention
- Orienting the practitioner to the organization's culture (i.e., policies, technology, and patient population, etc.) affects quality of service, patient satisfaction, and reduces errors

Overall compliance

Quality patient care and compliance is a global responsibility

- Risk is decreased for patients, practitioners, and facility when orientation includes education about regulations and facility specific processes
- Facility meets accreditation standards by ensuring practitioners understand and adhere to compliance requirements
 - Understanding patient privacy (HIPPA), billing practices, medical records, anti-kickback laws, and National Patient Safety Goals reduces risk
 - Transparent and easily accessible policies and procedures, reduce potential non-compliance
- Errors and potential legal issues are minimized
- Best practice credentialing ensures practitioners are qualified and competent to practice
- Maximizing technology

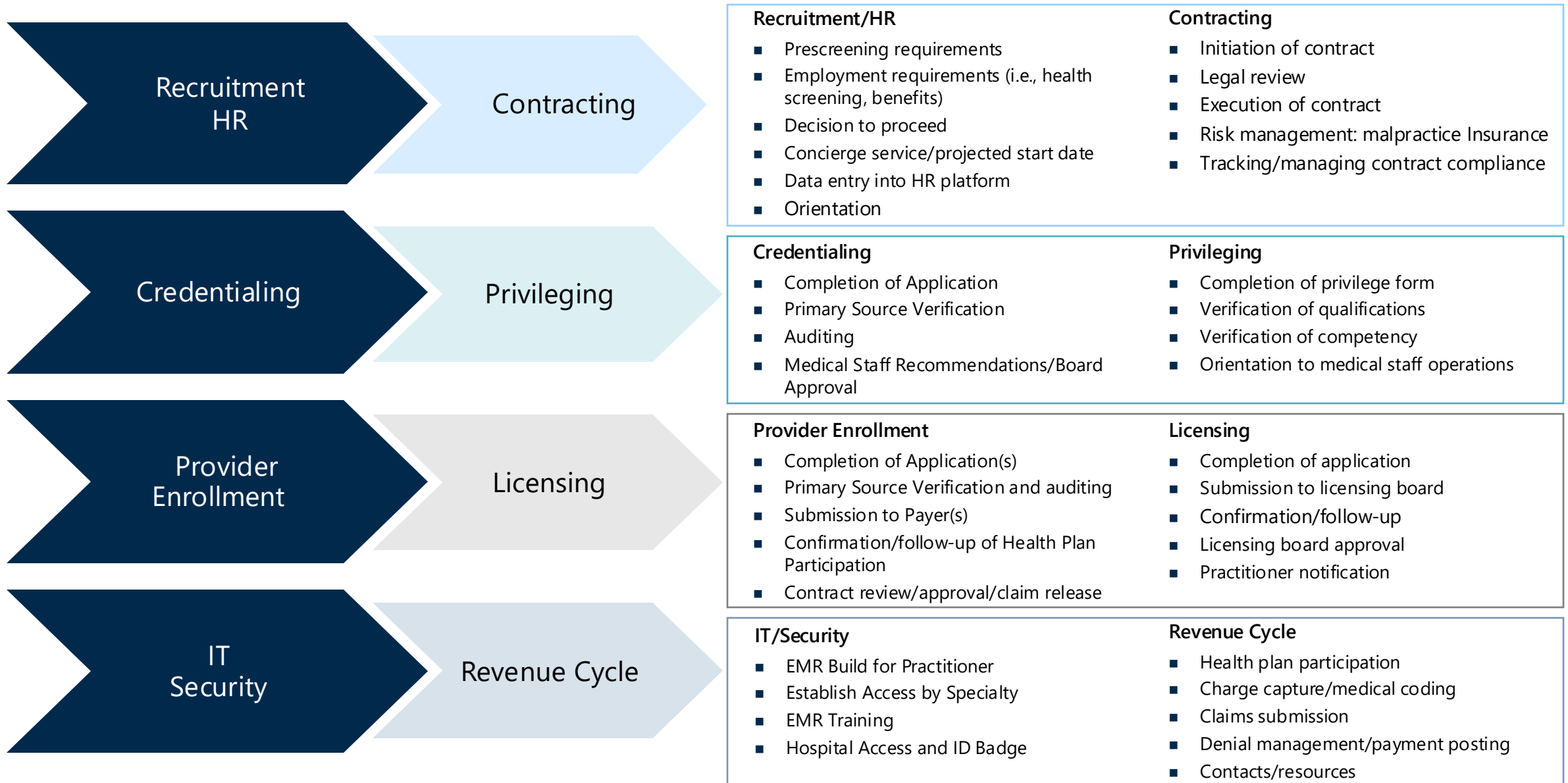
Challenges to achieving an optimized onboarding program

Key challenges to optimized onboarding



Optimized onboarding process

Key steps in the onboarding process



Concierge service

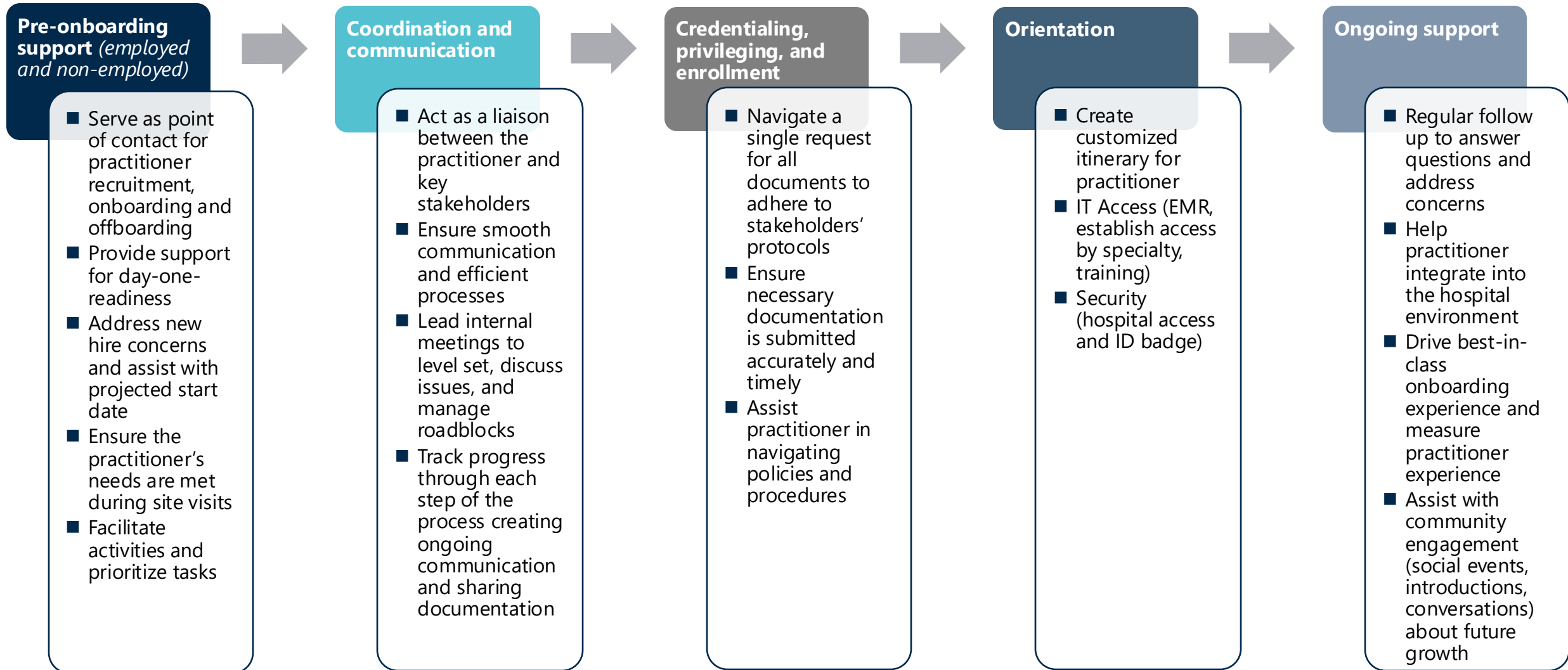
Paramount for an optimal practitioner experience, retention and brand reputation

Provides personalized service, resources, coordinates schedules, and fosters relationships

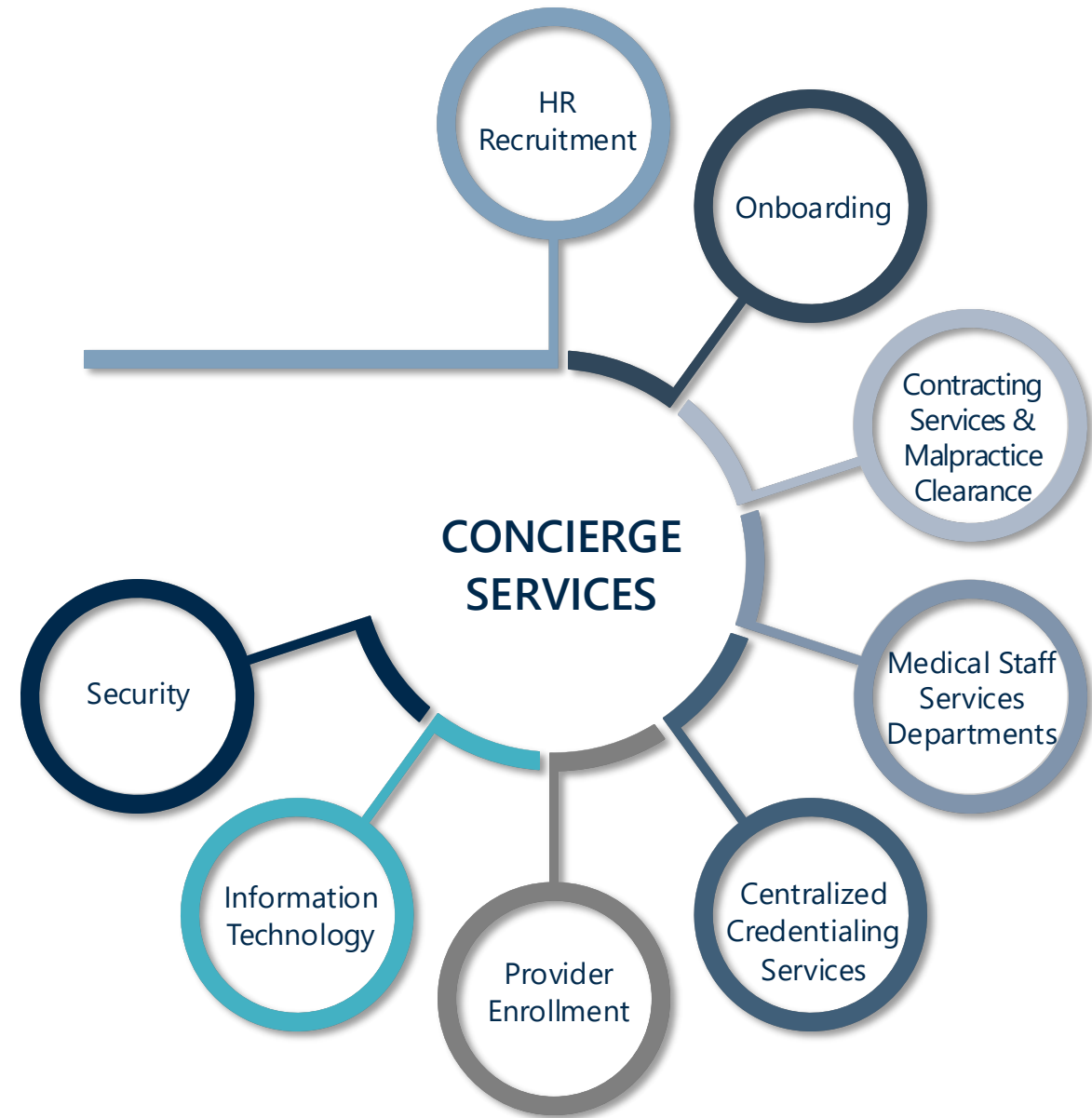
- Serves as the single point of contact for practitioners and liaise between all key stakeholders
- Sets the stage for success and fosters closed-loop communication, consistency, and teamwork
- Provides oversight to the onboarding process and achieves critical follow-through
- Addresses practitioner concerns and measures engagement at regular check-ins
- Adjusts communications for new practitioners according to their specialty
- Leads internal meetings to level set, discuss issues, manage possible roadblocks, and implement best practices
- Assist the practitioner with organizational and community engagement including social events, creating introductions, and facilitating conversations about potential future growth
- Defines the responsible parties for each orientation component to establish accountability and promote cooperative and productive working relationships
- Benefits include enhanced practitioner satisfaction, work-life balance, talent retention, and increased productivity

Concierge service

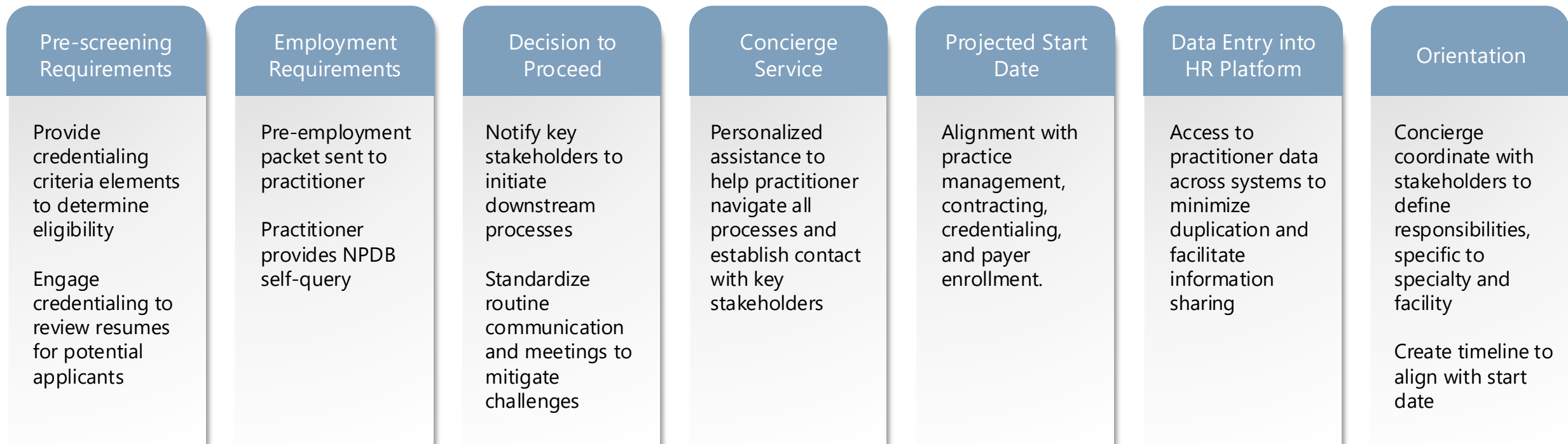
Provides personalized service, resources, coordinates schedules, and fosters relationships



*Seamless
onboarding
through guided
support*



Recruitment and HR onboarding process



Contracting onboarding process



Credentialing onboarding process

Completion of Application

One packet of documents to meet needs of all stakeholders

Define preferred communication methods

Primary Source Verification

Align with Provider Enrollment and Human Resources workflows

Auditing

Compare resume, Application and PSV prior to review

Track application workflows and create initial benchmarks to reduce turnaround times

Medical Staff Review

According to medical staff structure (Department, Credentials Committee, MEC)

Board Approval

Utilize expedited review process if appropriate

Orientation

Review medical staff operations, credentialing policies, ongoing practitioner performance, committee structure, medical staff leaders, and expectations

Notification Process

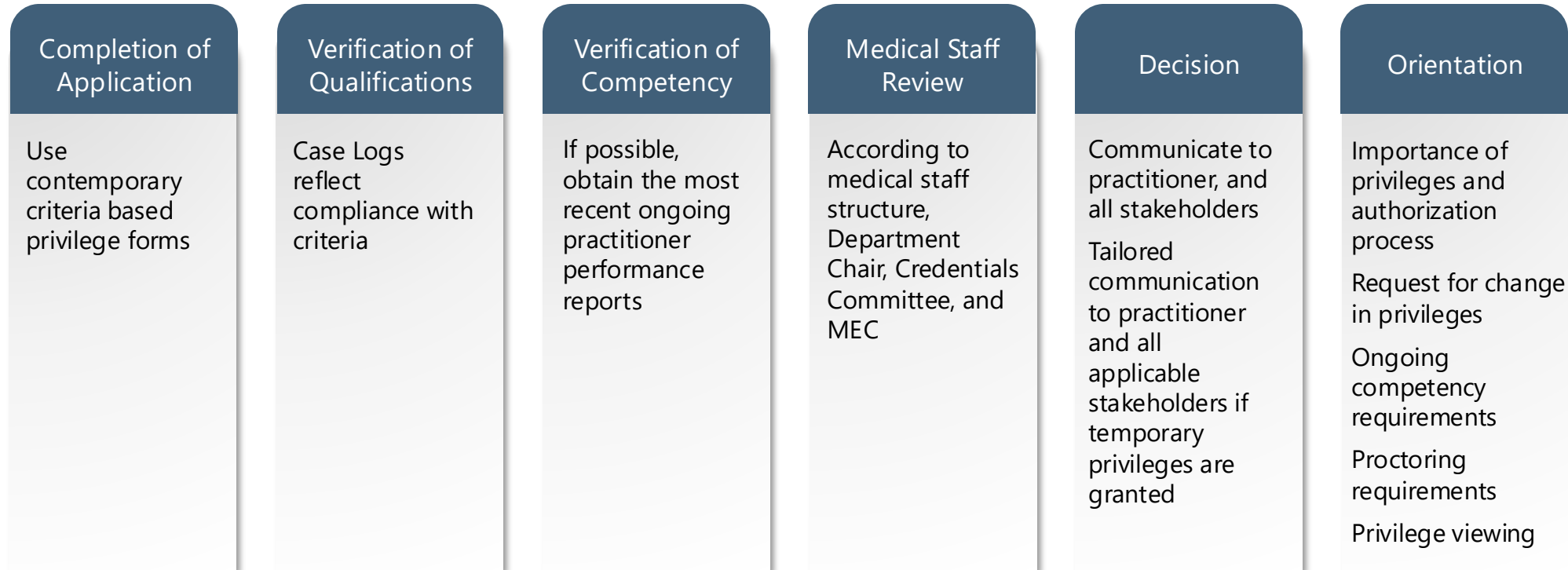
Notification to practitioner, privilege platform, medical staff leaders, senior leaders, and clinical staff

Evaluate

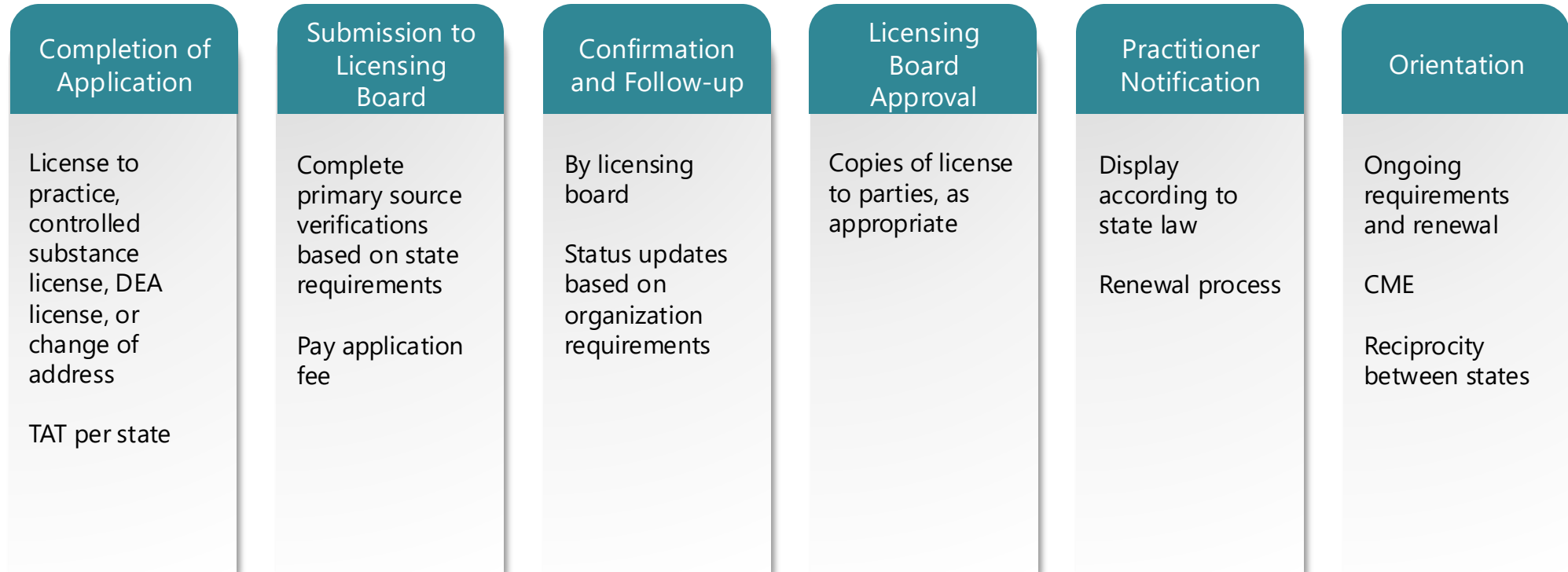
Obtain practitioner feedback at 14 days, 30 days and subsequently as appropriate

Debrief as a team to address any issues in the process

Privileging onboarding process



Licensing onboarding process



Provider enrollment onboarding process

Completion of Application(s)

Coordinate with Credentialing so one ask is made of the applicant

Know which plans are contracted, delegated, which states to work with, and who gathers signatures

Create and update CAQH

Primary Source Verification

Coordinate with Credentialing and HR to eliminate duplication

Auditing

All applications, documentation and supporting documents

Submission to Payer and Confirmation

Document dates of submission and advise payers

Confirm receipt by payer

Follow-up of Health Plan Participation

Timeframe follow-up defined by health plan and contractual parameters

Know TAT for each plan

Contract Review

Review contract for reimbursement rates, if applicable

Timely filing requirements

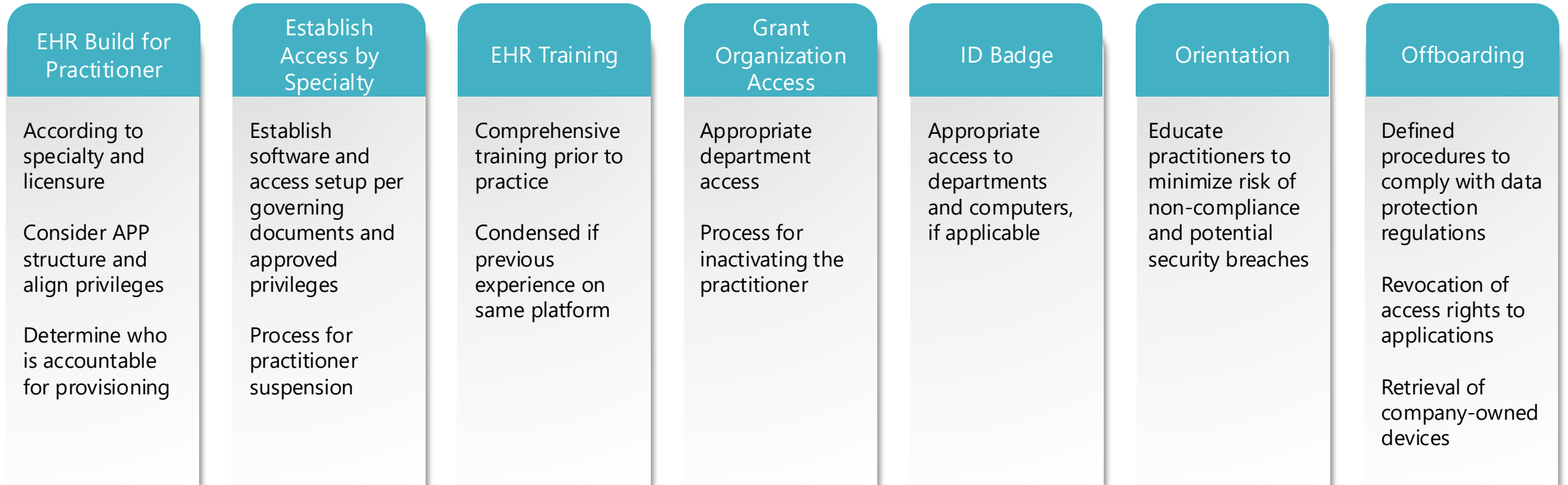
Approval

Notify practitioners, clinics, and/or appropriate stakeholders

Orientation

Ongoing education on payer requirements

IT and security onboarding process



Revenue Cycle onboarding process

Health Plan Participation

Confirm patient insurance coverage and eligibility with the payer before services are rendered

Charge Capture

Recording all services provided by the practitioner, including diagnosis and procedure codes

Medical Coding

Assigning accurate medical codes to the services provided according to established coding guidelines

Provide education on clinical documentation to support coding

Claim Submission

Electronically sending the completed claim with patient and insurance details to the payer

Denial Management

Identifying and addressing reasons for claim denial, taking corrective actions to resubmit claims, if necessary

Payment Posting

Recording payments received from payers applying them to patient's record

Contacts Resources

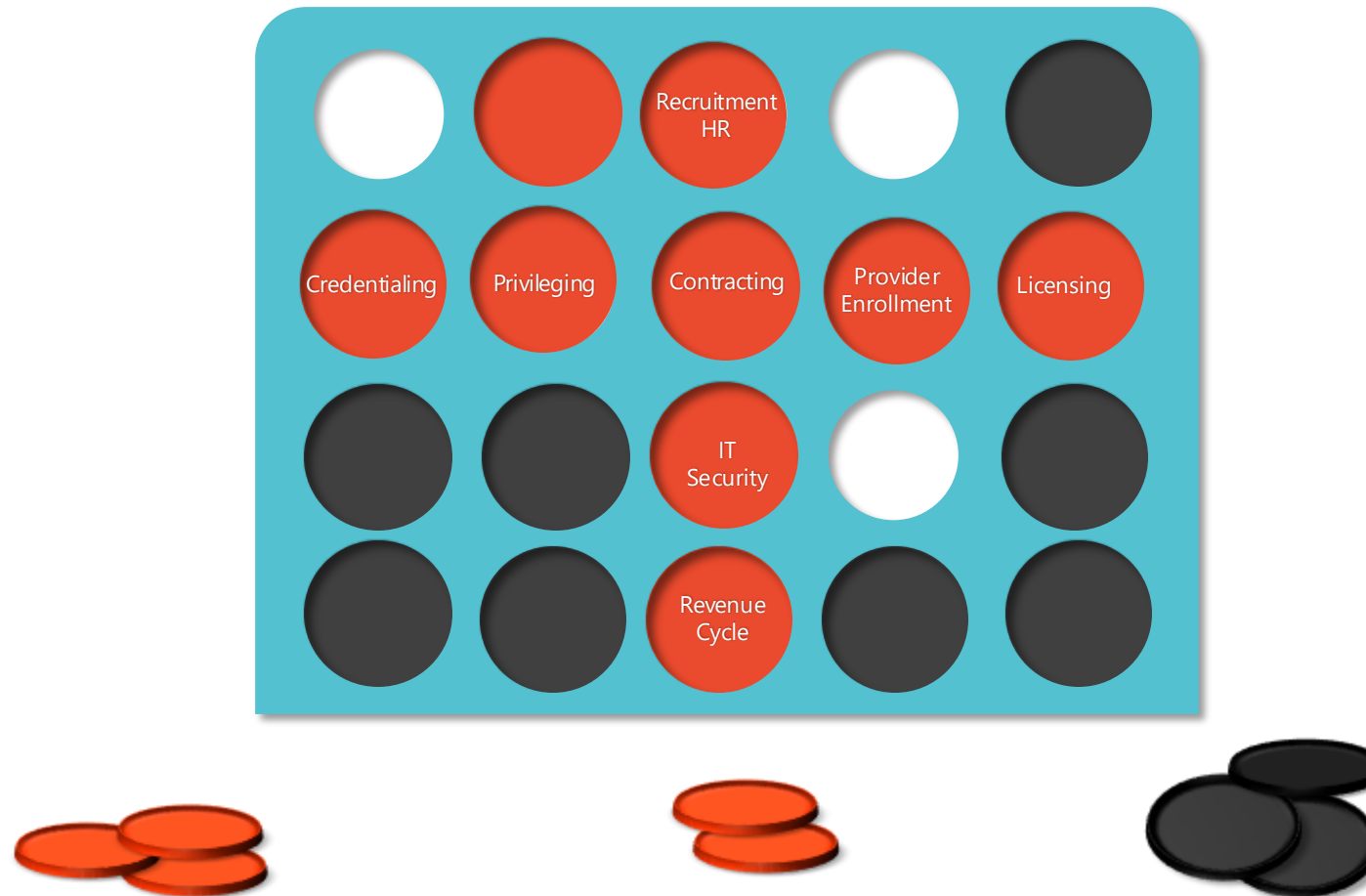
Provides support for billing and payments, ensuring timely reimbursement, minimize errors, and focus on clinical duties rather than administrative tasks related to billing

Orientation

Delays in onboarding have an impact on denied claims, practitioner satisfaction, access to care, and lost revenue

Optimized onboarding = Connect 4

EVERYONE WINS.



Questions/concerns?



Common Questions and Concerns

- How have you seen organizations successfully implement “concierge-style” onboarding without adding significant personnel or other costs?
- Which part of the onboarding process creates the most delays across stakeholders, and what’s the quickest win organizations can implement to reduce turnaround time?
- How do you measure whether onboarding is truly successful beyond just getting a practitioner to their start date?

— Thank *you* —

