

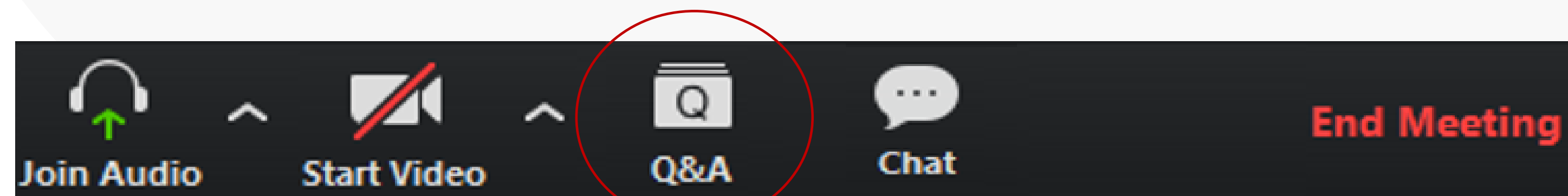
Payor Enrollment: The Front Door to Reimbursement

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Holly Virden, CPMSM



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Disclosure Slide

- Dawn Anderson and Holly Virden have no conflicts to report.



**Dawn Anderson,
CPMSM, CPCS**



**Holly Virden,
CPMSM**

Payor Enrollment: The Front Door to Reimbursement



Learning Objectives

- Define payer enrollment and distinguish it from credentialing, contracting, and revalidation.
- Explain the revenue impact of delayed or incomplete enrollment.
- Identify common enrollment pitfalls such as missing documentation, CAQH issues, incorrect NPI/TIN combinations, and internal communication breakdowns.
- Describe the full enrollment lifecycle and typical processing timelines to set realistic organizational expectations.
- Apply best practices for clean, timely enrollment submissions, including standardized onboarding packets, tracking tools, and payer-specific requirement libraries.
- Recognize high-risk operational scenarios (new providers, mergers, tax ID changes, address updates) that require proactive enrollment management.

Enrollment = Revenue



**Provider
Enrollment**



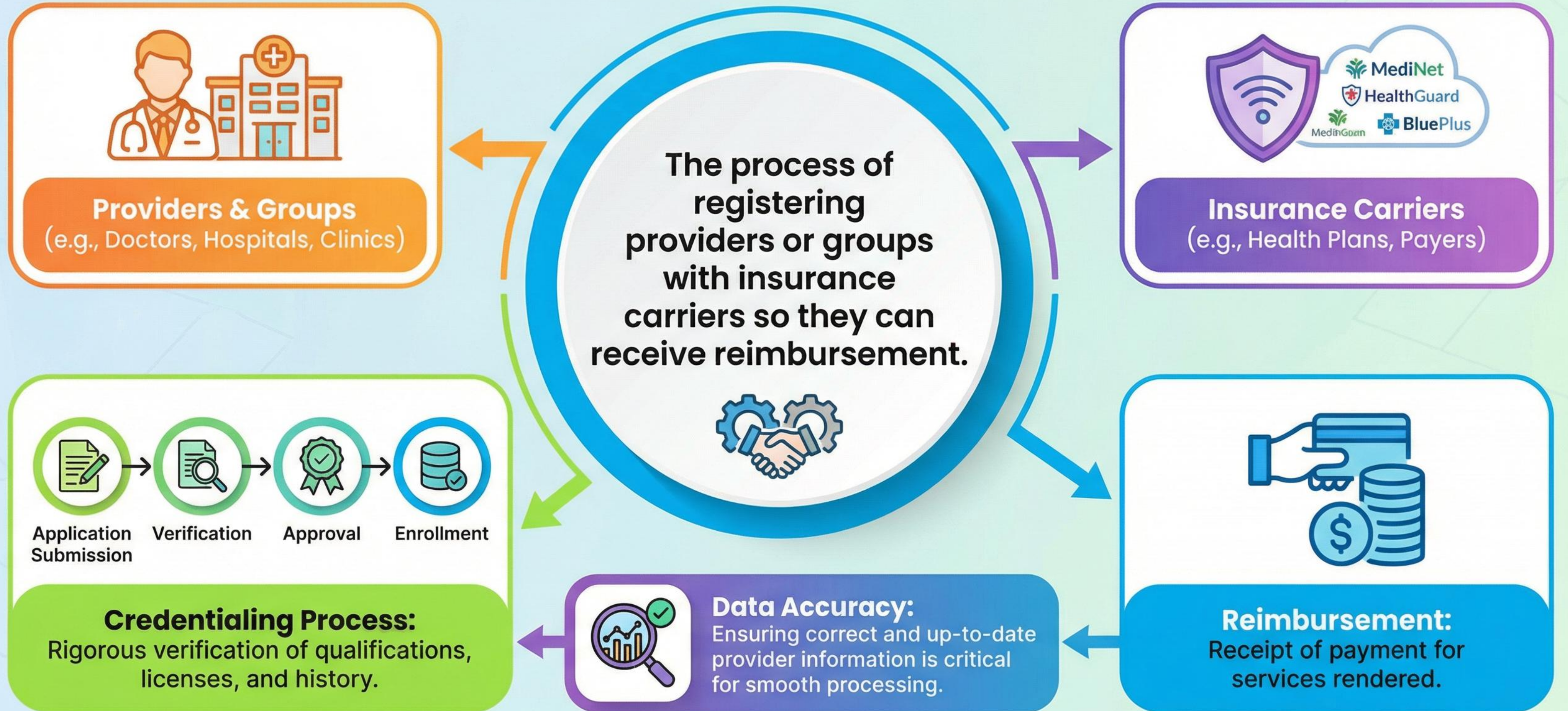
**Active
Provider**



Reimbursement

No enrollment = no reimbursement

What is Payor Enrollment?



What Payor Enrollment Is NOT

A Comparison of Key Healthcare Processes

Credentialing

- ✓ Verifies provider qualifications
Licenses • Education • Experience
- Focus:** Provider Vetting



Enrollment

- ✓ Activates reimbursement
- Focus:** Payment Activation



Contracting

- ✓ Defines rates, terms, and obligations
- Focus:** Agreement & Compensation



Enrollment

- ✓ Enables billing and claims submission
- Focus:** Operational Setup



Revalidation

- ✓ Maintains participation and eligibility
- Focus:** Status Maintenance



Initial Enrollment

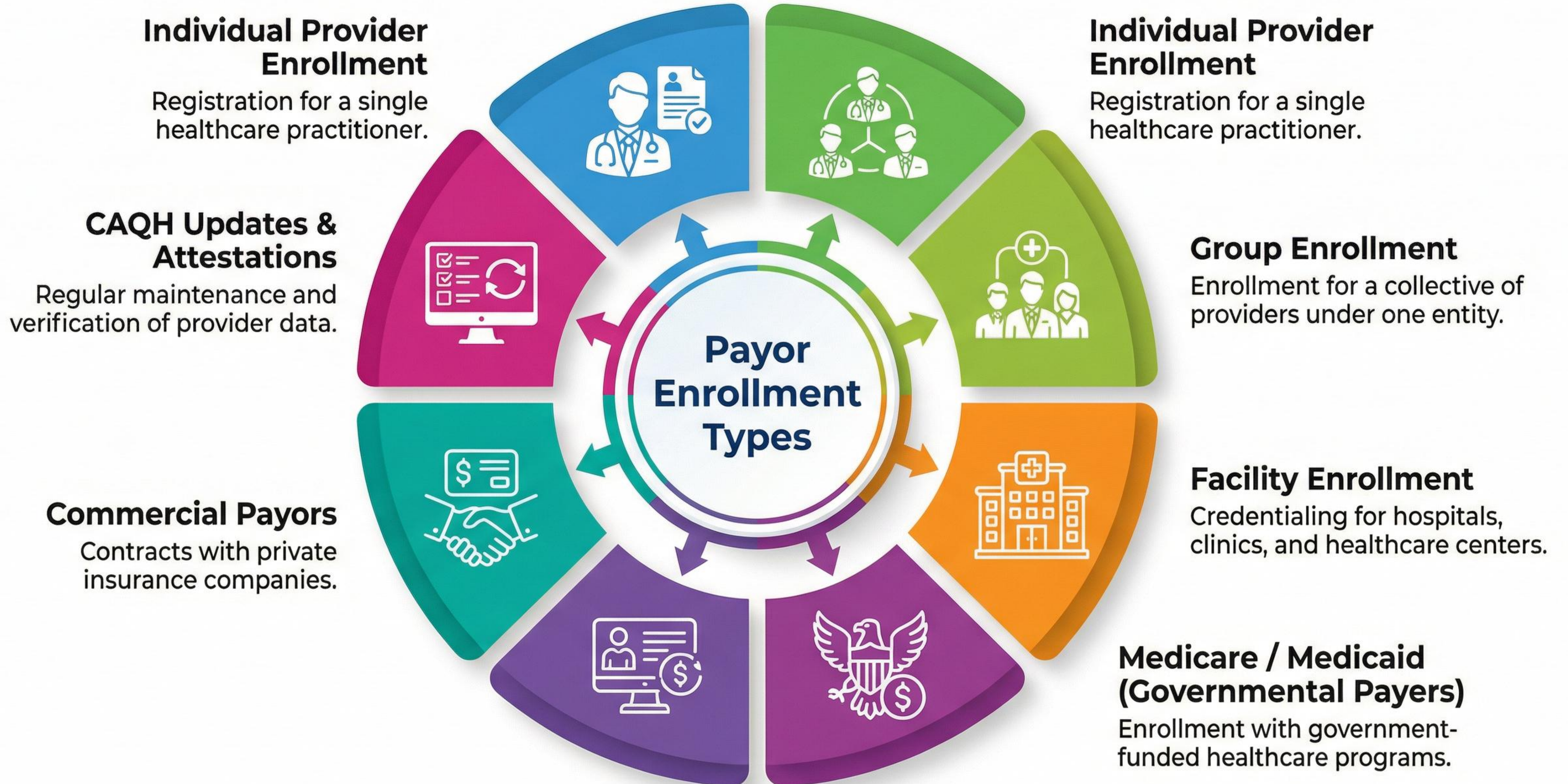
- ✓ Establishes provider participation
- Focus:** First-Time Setup



No Enrollment = No Reimbursement.

*Credentialing verifies providers. Contracting defines the agreement.
Enrollment activates reimbursement.*

Types of Payor Enrollment



Delegated Credentialing

Accelerating Provider Enrollment While Maintaining Compliance

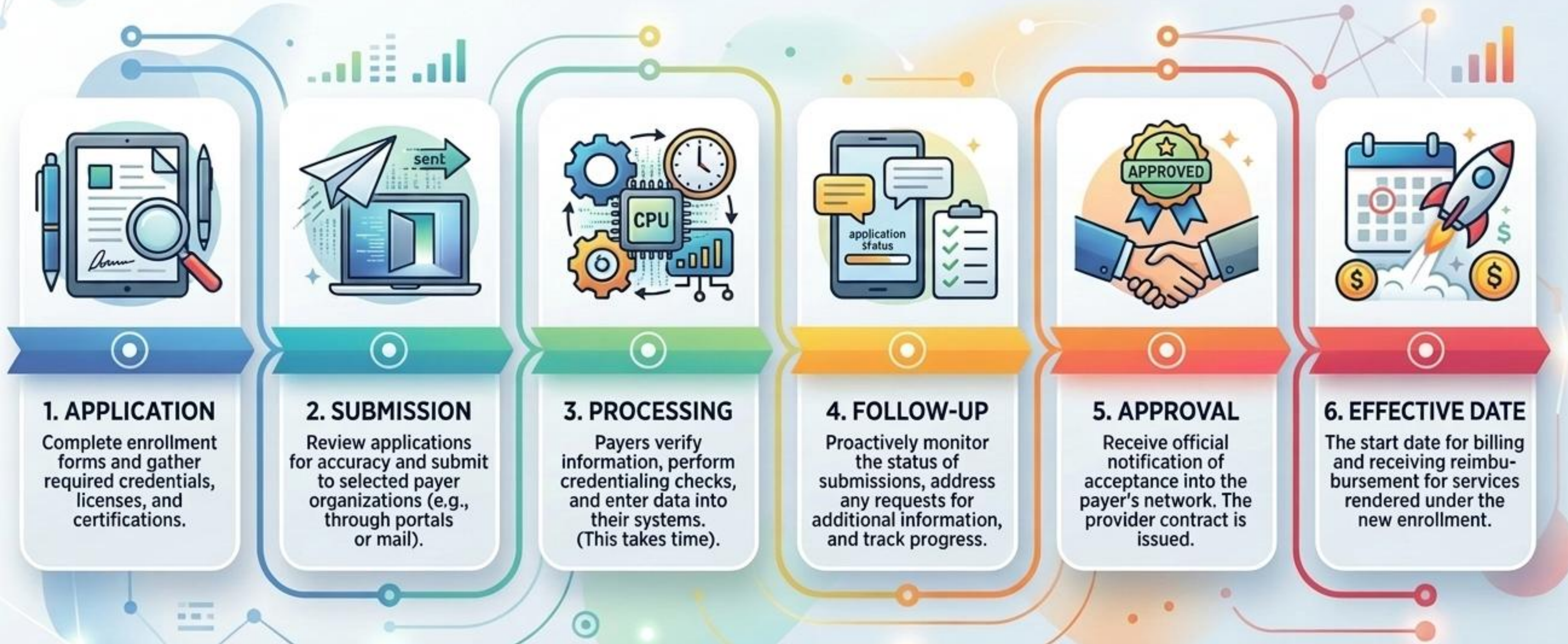


Delegated Credentialing transfers credentialing authority from the payor to the organization—allowing providers to be enrolled and billing faster while maintaining NCQA compliance.

Delegated Credentialing = Faster Enrollment + Faster Revenue

ENROLLMENT LIFECYCLE

Step-by-step concept for providers



1. APPLICATION

Complete enrollment forms and gather required credentials, licenses, and certifications.

2. SUBMISSION

Review applications for accuracy and submit to selected payer organizations (e.g., through portals or mail).

3. PROCESSING

Payers verify information, perform credentialing checks, and enter data into their systems. (This takes time).

4. FOLLOW-UP

Proactively monitor the status of submissions, address any requests for additional information, and track progress.

5. APPROVAL

Receive official notification of acceptance into the payer's network. The provider contract is issued.

6. EFFECTIVE DATE

The start date for billing and receiving reimbursement for services rendered under the new enrollment.

Enrollment is a process, not a quick task.
Typical timeline: 90–120 days.

WHERE THE PHYSICIAN ENROLLMENT PROCESS **REALLY** BEGINS

UPSTREAM DEPARTMENTS (START OF PROCESS)




RECRUITMENT
Ensures realistic start dates are communicated to providers. Aligns expectations.



HR ONBOARDING
Collects complete and accurate initial provider data.



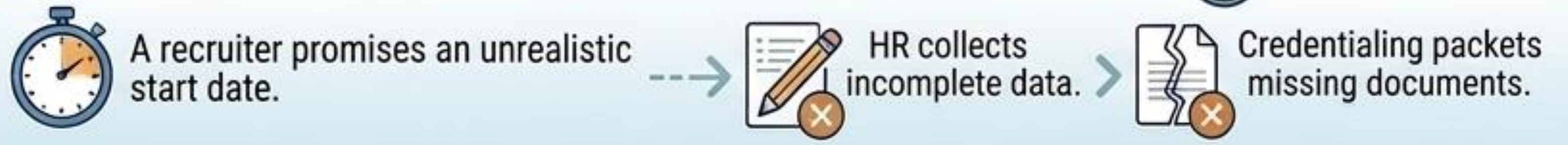
CREDENTIALING
Gathers all required verification documents and keys.



PROVIDER DATA COLLECTION
Compiles accurate information for the central file. Seamless data flow.

THE TRUTH: Enrollment starts long before an application is submitted. Enrollment problems rarely start in enrollment. They almost always start upstream.
"If information is wrong at the beginning, the entire process downstream is delayed."

CONSEQUENCES OF MISALIGNMENT



By the time enrollment receives the file, it is already too late for the promised date.

KEY TO IMPROVEMENT: ALIGN THE UPSTREAM WORKFLOW.
Ensure all departments work together seamlessly.

DOWNSTREAM ENROLLMENT



DOWNSTREAM ENROLLMENT TEAM



Receives complete, accurate files.
Submits applications efficiently to payers.
A successful result.



Why Enrollment Matters to Revenue

Revenue Impact



Claims deny if provider is not enrolled



Retroactive denials



Timely filing issues



Lost revenue from delayed effective dates

Real-World Consequences



60-120 day delays



Write-offs



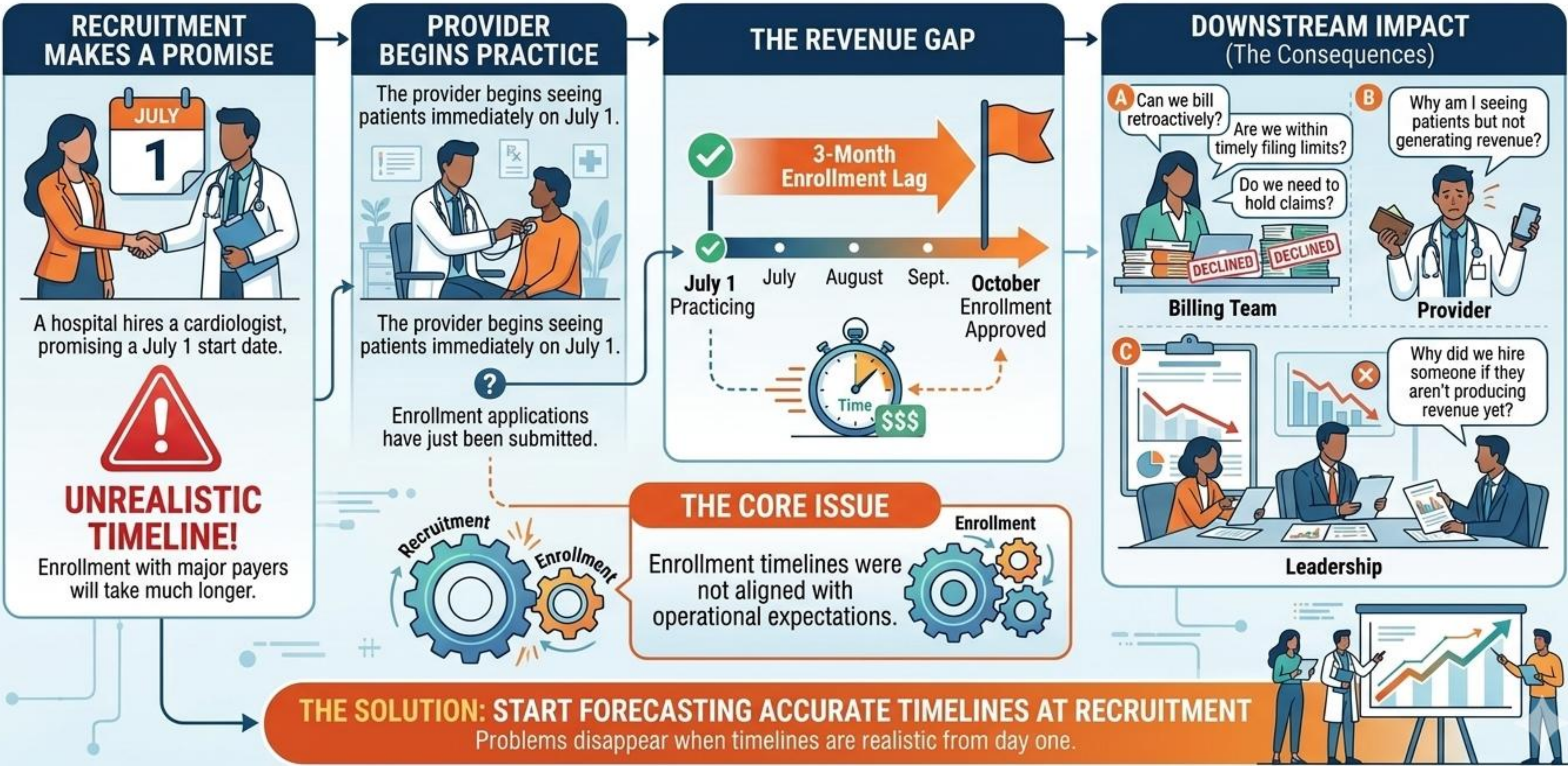
Provider dissatisfaction



Operational bottlenecks

What happens in your organization when enrollment is delayed?

WHERE THE PROCESS BREAKS DOWN: THE **UNREALISTIC START DATE SCENARIO**



TOP ENROLLMENT PITFALLS



**Missing
documentation**



**Incorrect
NPI/TIN
combinations**



**CAQH not
attested**



**Mismatched
practice
locations**



**Failure to
track
revalidations**



**Poor or
inconsistent
follow-up**

Common Breakpoints in Enrollment



When communication breaks → Enrollment failures happen



HIGH RISK SITUATIONS



Where Misalignment Happens:
HR, Credentialing, Billing, & Providers



The Solution:
Centralized Tracking System



Key Take-Away:

Most denials are preventable!

BEST PRACTICES CHECKLIST



“If enrollment isn’t structured, reimbursement isn’t reliable.”

THE PROVIDER ENROLLMENT TIMELINE PROCESS: CRITICAL STEPS FOR SUCCESS




“INSPECT WHAT I EXPECT” – TRACKING CRITICAL STEPS ENSURES COMPLIANCE & REVENUE FLOW



1. RECRUITMENT/HR NOTIFICATION

Notifies Enrollment immediately upon hiring.




- **Actionable Insight:** Minimizes overall onboarding lag-time.



2. PROVIDER COMPLETION

Provider completes full credentialing packet.


- **Actionable Insight:** Ensures comprehensive data collection.



3. CAQH ATTESTATION

CAQH profile completed and attested before submission.

- **Actionable Insight:** Establishes a verified data baseline.



4. SUBMISSION CONFIRMATION

Documentation of submission confirmation received.




- **Actionable Insight:** Proves timely action to Payors.



5. TRACKED FOLLOW-UP


Ongoing, logged tracking of all follow-up with Payors.

- **Actionable Insight:** Prevents applications from stalling in review.



6. SYSTEM APPROVAL VERIFICATION

Approval verified in the system *before* billing begins.



- **Actionable Insight:** Guarantees accurate claims & avoids rejections.

CRITICAL DATA & STEPS FOR DRIVING PROCESS EFFICIENCY

KEY ENROLLMENT DATA ELEMENTS: INSIGHTS THAT DRIVE PROCESS



“INSPECT WHAT I EXPECT” - LEVERAGE DATA TO REFINE PROCESS

TURNAROUND TIME
(by Payor & Specialist)

Key Insight: Shows operational efficiency.

Payor Specialist

PENDING ENROLLMENTS
Reveals process bottlenecks.

ENROLLMENT-BASED DENIALS

Timeline

Key Insight: Quantifies financial impact.

ENROLLMENT PROCESS

DELAYED REVENUE
(Enrollment Gaps)

Key Insight: Powerful leadership metric.

ENROLLMENT-DENIALS

Key Insight: financial impact.

DATA-DRIVEN ENROLLMENT MANAGEMENT

MEASURING PROVIDER ENROLLMENT MATURITY: A 4-LEVEL MODEL FOR REVENUE STRATEGY

ORGANIZATIONS OPERATE AT VERY DIFFERENT LEVELS OF ENROLLMENT MATURITY.

THE SHIFT WHERE ORGANIZATIONS SEE MEASURABLE FINANCIAL IMPROVEMENT

4 LEVEL 4 – STRATEGIC

Enrollment is aligned with recruitment planning and revenue forecasting.



3 LEVEL 3 – MANAGED

Metrics are tracked, timelines are measured, and leadership reviews performance.



2 LEVEL 2 – ORGANIZED

There is a centralized tracker and defined processes.

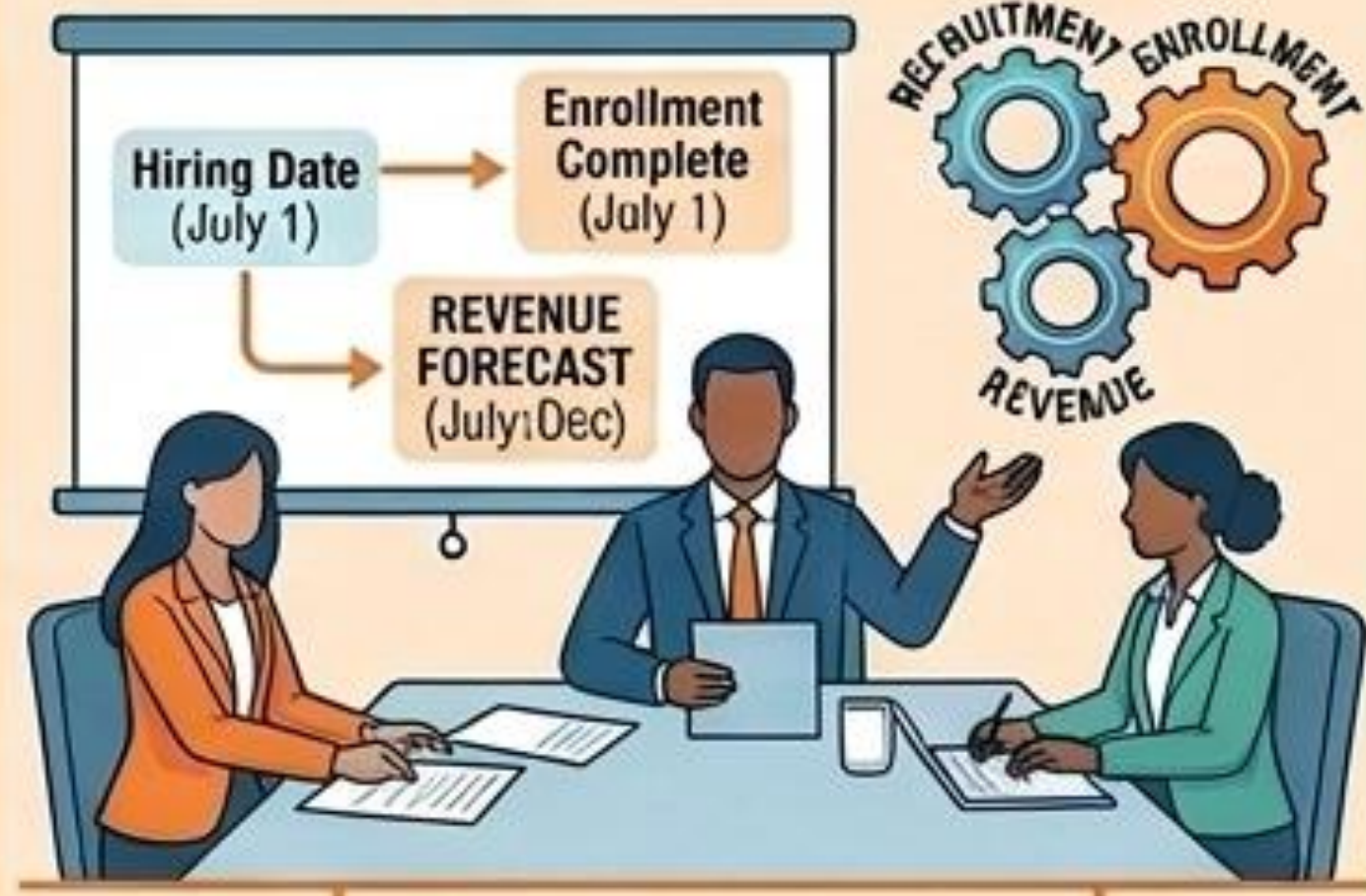


1 LEVEL 1 – REACTIVE



4 LEVEL 4 – STRATEGIC

Enrollment is aligned with recruitment planning and revenue forecasting.

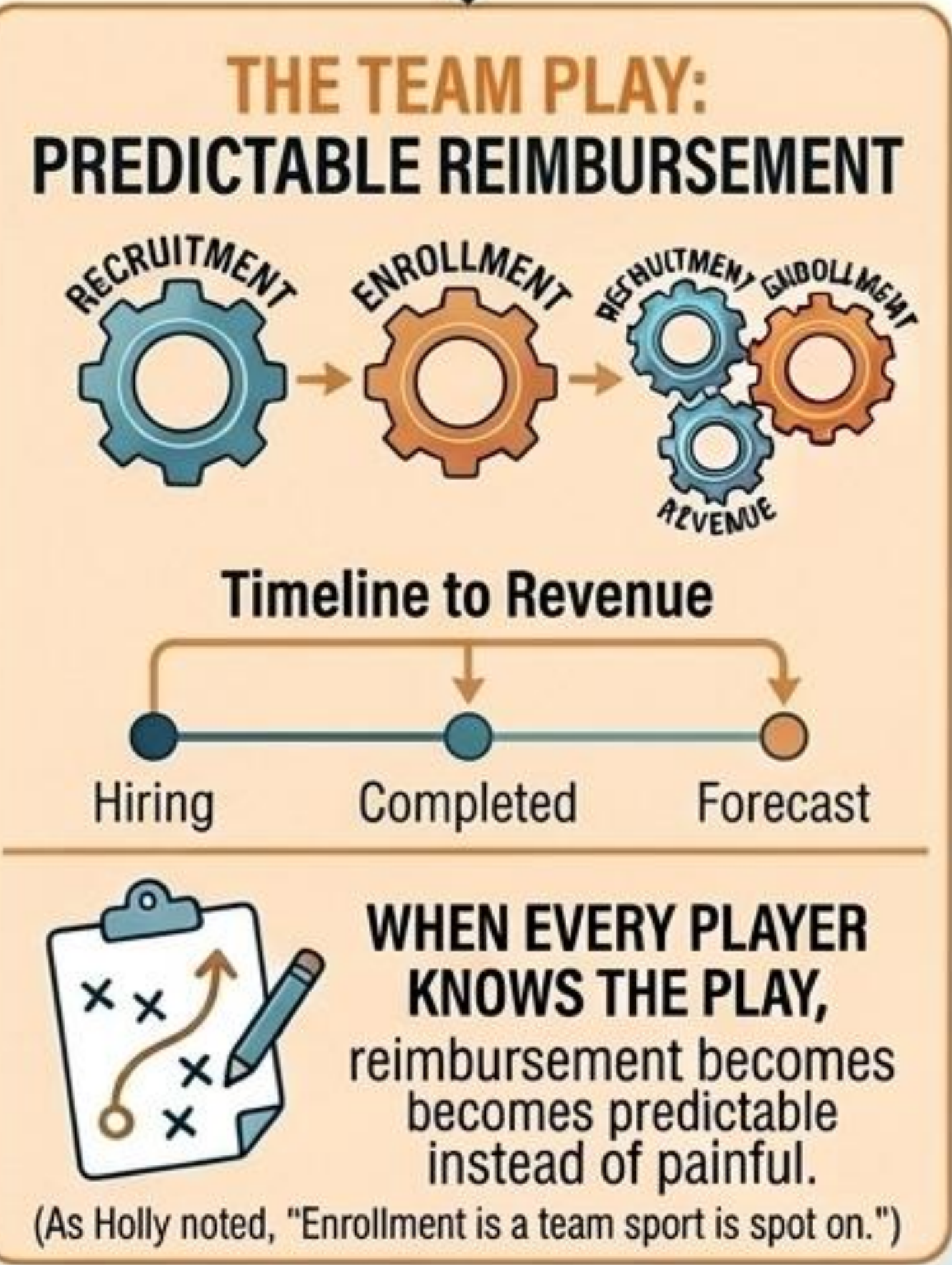
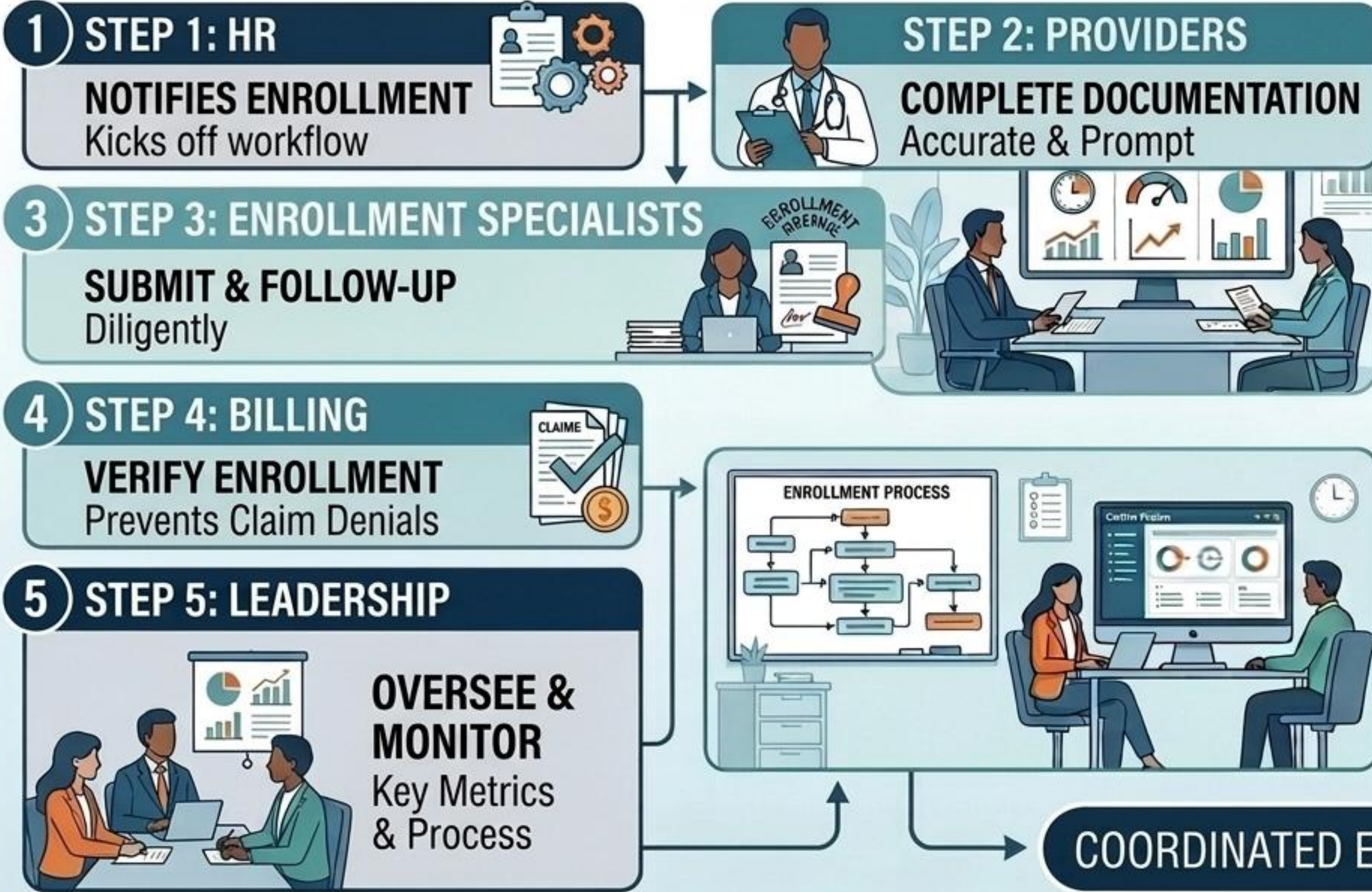


Organizations that reach Level 4 don't just process enrollment... They use enrollment as a revenue strategy.

ENROLLMENT: A TEAM-BASED REVENUE STRATEGY

ENROLLMENT IS CROSS-FUNCTIONAL AND REQUIRES EVERYONE ON THE SAME PAGE.

THE SHIFT WHERE ORGANIZATIONS SEE MEASURABLE FINANCIAL IMPROVEMENT



Wrap-Up & Key Takeaways

Enrollment is the front door to revenue



Most issues stem from process failures



Consistent follow-up with payors is critical



Delays cost real dollars



Tracking, accountability & transparency are essential






Q&A


Questions & Answers

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