

Checklist: Discussing Onboarding Issues Before Closing a Physician Practice Acquisition

Negotiating a Physician Deal? Involve an Onboarding Team

These arrangements are complex. A comprehensive assessment approach that touches on many administrative and management issues is needed. Onboarding teams can use this checklist for assessing a practice and holding key discussions with physicians and practice managers.



Assess shift to new payer contracts to identify potential payer-patient disconnect under new payer and provider terms



Complete honest 3-year profit & loss projection accounting for new payer contracts, increased expenses (benefits, IT, increased staff costs), shifting referral patterns, realistic ramp-up



Establish internal marketing expectations including in-person with colleagues, telehealth and social media presence



Establish physician expectations regarding schedule control and patient appointments



Establish call coverage guidelines and expectations



Set a strict credentialing documentation timeline and expectations even before start date and preferably even before signing a deal



Interview all practice employees (e.g., support staff, practice manager, nurses, billing clerk) and assess suitability for the hospital's employment environment



Discuss and review expectations regarding use of system specialists and services promoting clinical integration and care coordination



Perform clinical quality review to identify areas for training or compliance opportunities (establish future chart review expectations and quality protocols)



Discuss issues related to advanced practice providers (APPs), including nurse practitioners and physician assistants - share hospital's current and envisioned APP management and clinical model



Review EHR transition expectations including short and long-term reduced productivity, adoption/success bonus, documentation expectations, compliance/quality/revenue indicators



Discuss budgeting and purchasing expectations - establish physician engagement expectations