

Why You Should Have an **Offboarding Plan**

With special guest, Donna Ecclestone

 **Marketware**



Agenda



- Define Offboarding
- Understand how organizational offboarding protocols can affect recruitment & onboarding
- Learn program techniques to share with leaders & implement into your organization



Speakers



Leslie Kinkade

Enterprise Account Executive

Marketware, a Division of Medsphere



Donna Ecclestone, CPRP

Ecclestone Onboarding & Integration



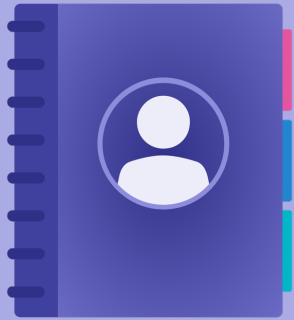
Marketware

Product Overview



Marketware Overview

Integrated Physician Focused Technology



Physician Relationship
Management



Healthcare Analytics



Physician Recruitment



Physician Onboarding



Physician Relationship Management (*PRM*)

Plan, track & measure the effectiveness of liaison activity across key growth initiatives.

The screenshot displays the Marketware PRM interface. The top navigation bar includes 'Marketware', 'People', 'Places', 'Activities', 'Issues', 'Recruit', 'Onboard', 'PRM', and 'Analytics'. The main content area shows the profile of 'Dr. Luis Campos', a Physician with Specialty: Hematology & Oncology. The profile is divided into sections: 'Contact' (Mobile Phone, Work Email, Home Address), 'Last Completed Activity Date' (07/12/2023), 'Primary Affiliation' (Oncology Consultants), and 'Practice Opportunities' (Southside Cancer Care, Screening, Assigned to: Carrie Ben..., Status: Inactive, 2/3 tasks completed).

PRM Features

- Set growth initiatives
- Track progress of strategic plans
- Integrate with internal & claims data
- Mobile app for the in-field use
- Segment target lists
- Demographic management



Healthcare Analytics

Powerful business intelligence & analytics specifically designed by & for healthcare professionals.

Analytics Features

Analyze & act on data trends

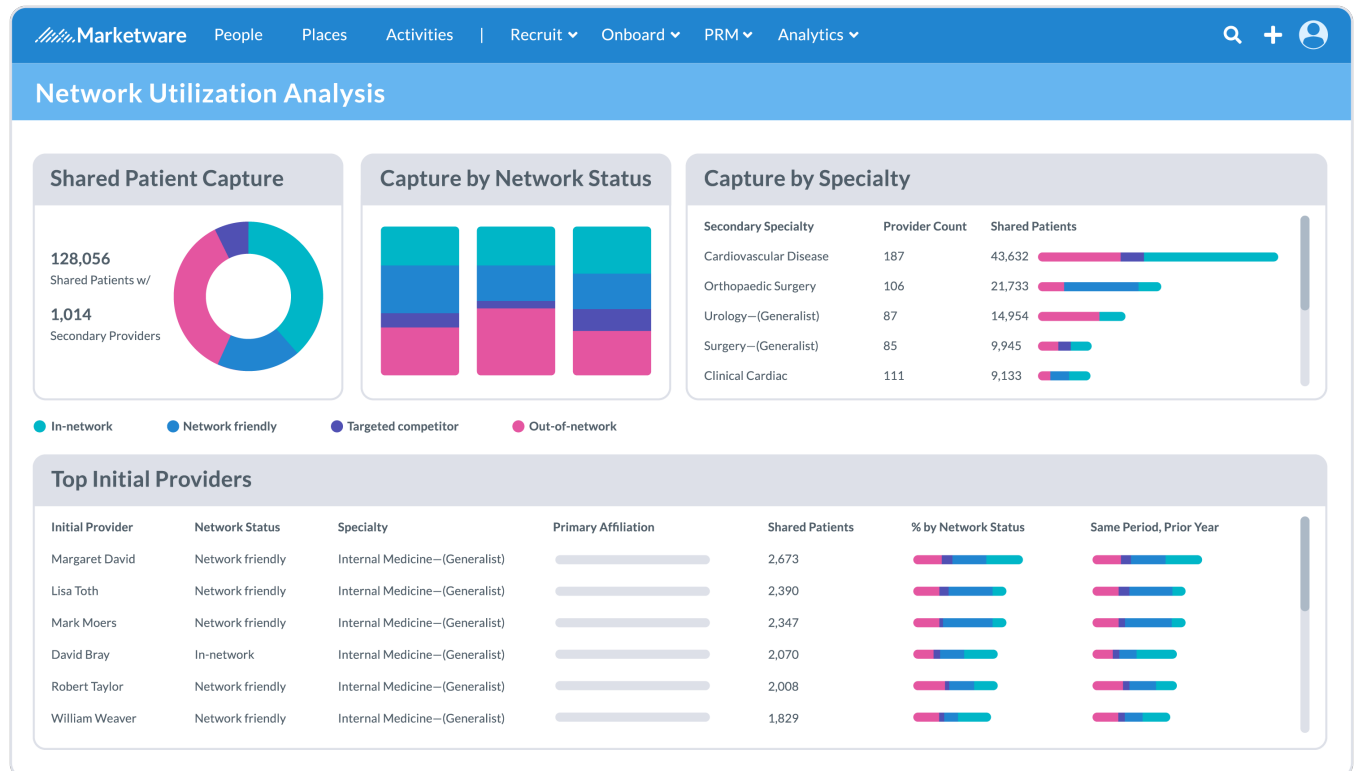
Understand your market

Illustrate ROI

Enhance network

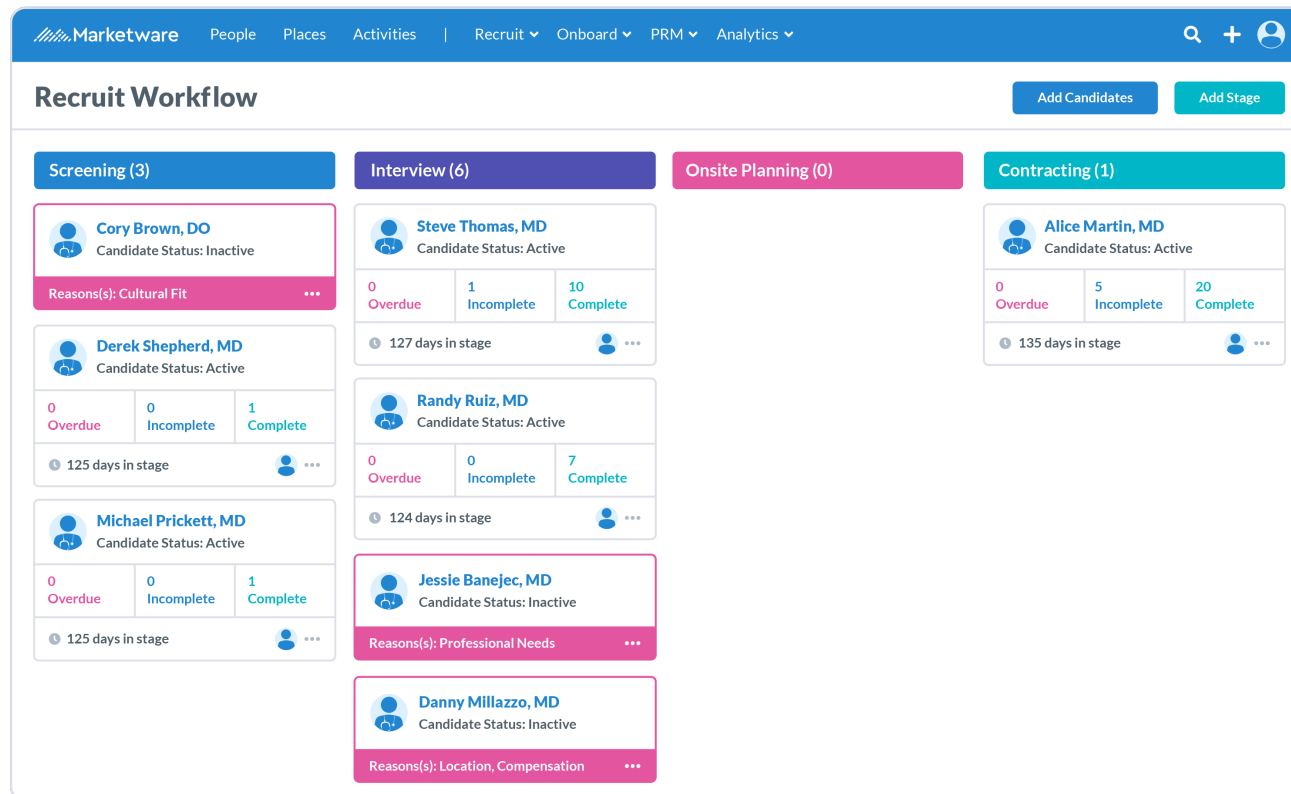
Enjoy PRM integration

Combine data assets



Physician Recruitment

Designed by & for healthcare recruiters, an easy-to-use physician internal tracking platform.



Recruitment Features

- Source leads
- Identify key players
- Segment candidates
- Visualize complex pipelines
- Collaborate across departments
- Receive added insights



Physician Onboarding

Collaborating on new provider launch & streamlining integration.

Onboarding Features

Elevate onboarding best practices

Customize onboarding templates

Monitor onboarding KPIs

Stay on track with milestones

Department collaboration

Increase provider retention

Project Status Board

Add Provider

On Track

Ivan Coggins, MD
Physician | Family Medicine
Barrett Memorial Physician's
Group—Hardeeville

91% completed 52/57 activities

Feb 10 7 days left

Danielle Milazzo, MD
Physician | Allergy & Immunology
Abercorn Infectious Disease

21% completed 12/57 activities

Jun 3 4 months left

Robin Smith, MD
Physician | Family Medicine
St. John's Community Physician's
Group—Richmond Hill

0% completed 0/57 activities

Jul 22 6 months left

At Risk

Matt Bennett, MD
Physician | Neurosurgery
Barrett Memorial Physician's
Group—Okatie

86% completed 49/57 activities

Feb 12 9 days left

Alexis Choudhury, MD
Physician | Family Medicine
Abercorn Infectious Disease

87% completed 48/57 activities

Feb 4 a day left

Jordan Davies, MD
Physician | Family Medicine
Barrett Memorial Physician's
Group—Beaufort

88% completed 50/57 activities

Feb 26 23 days left

Off Track

Completed

Michael Prickett, MD
Physician | Internal Medicine
Barrett Memorial Physician's
Group—Bluffton

100% completed 56/56 activities

Jan 29 -5 days left

Catherine Riester, MD
Physician | Family Medicine
Heart Specialist of Savannah

100% completed 56/56 activities

Jan 31 -3 days left



What is offboarding?

Offboarding is the process that leads to the formal separation between an employee & employer through resignation, termination or retirement. It encompasses all the decisions & processes that take place when an employee leaves.

— *BambooHR*



Why is proper offboarding important?



Patient Care



Recruitment & Retention



Risk



Finances



Fast Facts

1. Proper offboarding is just as important as proper onboarding.
2. Effective offboarding reduces risk to your organization.
3. Offboarding impacts current & future revenue.
4. Offboarding can affect recruitment & retention.
5. Offboarding should be planned & completed over time.



Patient Care Concerns

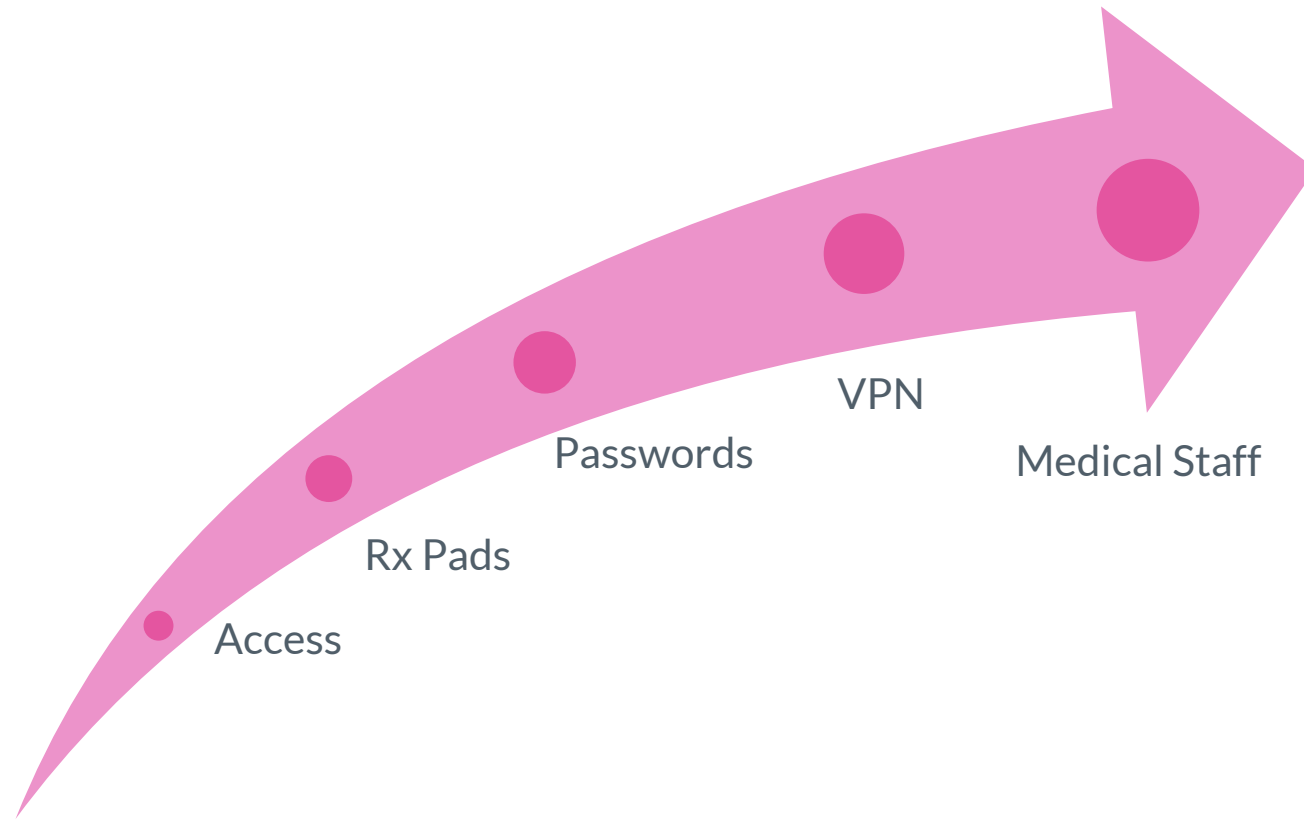
Patient Treatment Plans

Patient Future Orders

Build Trust with New Provider



Risk



Recruitment & Retention

A formalized offboarding policy can help ensure all parties know the transition steps.

A formalized offboarding program may help alleviate concerns patients & partners have about the provider leaving.

When people leave, they still represent your organization. Departure should end on a positive note for all parties.



Financial

HIPAA Security Breeches

- Can be costly fines for organizations
- Breeches bring negative attention

Staffing Costs

- Unstaffed healthcare positions average \$8,000/day
- Locums costs
- Burnout

Revenue

- Unclosed charts & coding errors
- Reimbursement
- Provider of choice



Sample Transition Plan

6 Month Prior

- Receive resignation letter
- Notify HR/payroll/leadership/ credentialing/partners

3 Month Prior

- Define transition care plan for patients
- Send letter to patients
- Notify scheduling team of departure date/freeze schedule



Sample Transition Plan

60 Days Prior

- Notify IT remove access after departure date
- Request medical record deficiency report

1 Month Prior

- Set up appointments for HR/review benefits
- Communicate departure to key care team members
- Conduct exit survey



Sample Transition Plan

1 Week Prior

- No clinical patients
- Address all outstanding charting & billing issues

Departure Day

- Remove IT access/turn in all corporate own property
- Remove info from website/distribution lists
- Terminate in payroll



Sample Transition Plan

2 Weeks Post

- Verify inbox is covered
- Run report on patients tied to providers with future orders to ensure coverage is provided

1 Month Post

- Verify inbox is covered
- Ensure patients are not linked to departing provider



Exit Surveys

- Why are they leaving?
- Who is conducting surveys?
- How are they conducted?
- Who receives results?



Action Items

- Review deck & recording with leaders
- Survey departments on their current process
- Understand where opportunities exist to strengthen your current program
- Implement changes to limit risk & improve experience
- Document process & policy
- Set a date to reevaluate & adjust as needed



Questions About
Offboarding?



Thank You

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