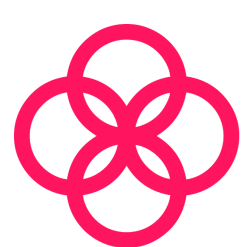


Collaborating Physician Guide

Updated: 10/2024



Purpose

The purpose of this document is to provide an easy-to-use, comprehensive guide for all information needed before, during, and after collaborating. Please keep this handy on your desktop, as most questions can be answered with this document.

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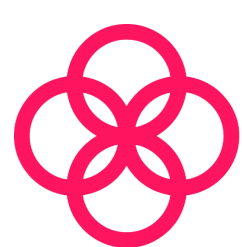
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Ratio Information

External Collabs

It is important to inform the collab team how many external collaborative agreements you have in place prior to being sent any OpenLoop collaborative agreements. The team does not need to know specific names of who you are collaborating with or what company these take place with, however we do need to know the total number of external collabs. This helps the collab team know how many open ratio slots we have available on each license. The states that are most important to note external collaboration numbers in are:

- Alabama
- California
- Georgia
- Missouri
- New York
- Ohio
- Oklahoma
- South Carolina
- Texas
- Virginia

Pay Rate for OL Collabs

OpenLoop operates on a blended fixed and variable rate compensation model for collaborating physicians. Payment for collaboration services will be paid on a monthly basis. Physicians will receive \$250 per month per APP overseen for specific states in which he or she serves as a collaborating physician. The states that are eligible for this monthly stipend are **Alabama, California, Georgia, Illinois, Mississippi, Missouri, New York, Ohio, Oklahoma, South Carolina, Tennessee, Texas, and Virginia.**

Physicians will also receive a rate of \$10 per APP chart reviewed on time (within 30 days). This per chart rate will stay consistent at \$10 per chart reviewed (on-time) but the total compensation per month could vary based on the volume of charts the APPs did the month prior. This per chart compensation is eligible for every state and every APP that the physician is supervising under the OpenLoop PC group.

If you notice any issues within your collab pay, please email collabphysiciansupport@openloophealthpartners.zohodesk.com



Point of contact: Yvonne Mora & Ben Brogger

Chart Review

Chart review requirements vary by state. It is OpenLoop's policy to review 10% or 20 charts, whichever is less, per month unless state regulations specify a higher requirement. States with Additional Requirements for Advanced Practice Providers:

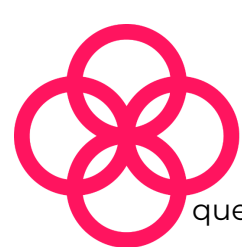
- Alabama
 - Review of at least 10% of medical records, plus all adverse outcomes.
- Georgia
 - Chart review required for all charts where controlled substances are prescribed.
- Mississippi
 - Medical record review of 10% or 20 , whichever is less, quarterly.
- Indiana
 - Review at least 5% of medical records monthly.
- Missouri
 - The collaborating physician must review the work and records of the NP at least once every 2 weeks.
- Tennessee
 - 20% of Nurse Practitioner charts will be reviewed by the Collaborating Physician every month.
- Texas
 - Review at least 10% of medical records monthly.

All Chart Reviews will be documented via the Chart Audit Form Tool.

Please schedule a meeting with Yvonne Mora at the start of becoming a collaborating physician to go over how to access charts and all necessary requirements. A minimum 30 minute meeting is required so that you can understand how to access your charts in order to be compensated.

You will receive your charts to review on the 2nd Monday of every month. They will all need to be reviewed and completed by the 1st Monday of the following month (since the new set of charts will come to you that following Monday).

The provider may present any additional charts they would like to review based on



questions about diagnosis or treatment plan.

OpenLoop will retain a copy of any documentation verifying the chart review. Copies of documentation will be retained while the Collaborative Agreement is in effect and for two years after the date the Collaborative Agreement is terminated.

Quality Assurance Meetings

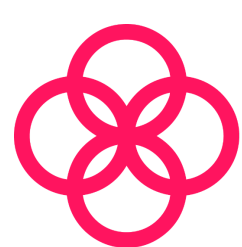
Quality Assurance (QA) meetings are scheduled monthly (but attendance by the APPs is only required quarterly) unless state regulations specify differently. States with Additional Requirements:

- Illinois- Monthly
- Tennessee- Monthly
- Texas- Monthly (for 1 year)

Meetings will be to share information related to patient treatment and care, changes needed in patient care plans, issues related to referrals, and patient care improvement. **When initially meeting with Yvonne Mora, please make sure to give her two dates per month that you will be available to hold the QA meetings. Yvonne will then help to schedule these QA meetings for you each month and make sure to include all NPs necessary on the meeting link.** This is the easiest way to schedule QA meetings, as she has access to the NP schedules. Please expect the first QA meeting to be at least 30 minutes.

QA meetings/feedback sessions will be documented via the QA meeting google form tool.

OpenLoop will retain a copy of any documentation while the Collaborative Agreement is in effect and for two years after the date the Collaborative Agreement is terminated. The day, time or location of any QA meeting may be changed at the prior request of either party with the other's consent as long as the statutory requirements for meetings are met.



Processes

Becoming Collaborating Physician Process

By the time of reading this, you likely had been through this process already. After going through the interview process and seeing if this is a good fit, you will stay in contact with the recruiter until you reach the point of the introduction to the collab team.

The recruiter you speak to will explain the steps of how everything will get set up, from platform access to email setup. Once all documents are received by the recruitment team and passed off to the collab team, it will bring you right into the next step in this process.

Collaboration Process

After agreeing to become a collaborating physician and signing the Clinical Collaboration Expectations, this will trigger the Collab Team to contact you.

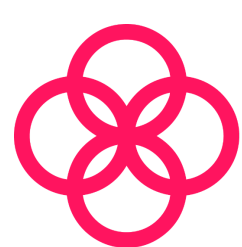
First, an introduction message will be sent via Slack between you, the Collab Team, the Quality Assurance director, and other personnel utilized in OpenLoop's collab process. This gives you an opportunity to meet the people you may utilize for anything collab related. This also gives you an opportunity to **inform the collab team of all external collab numbers**. After being sent the collab Slack introduction, the collab team may start utilizing your licenses for collaboration agreements.

Collaborative agreements will be sent via DocuSign. The DocuSign will prompt you to input your signature and other necessary information. The APP will also be sent the same DocuSign where they will enter their information and signature. After BOTH parties have signed, DocuSign will automatically send you a copy for your records. OpenLoop will also maintain a copy for our own records.

After the DocuSign is sent, the collab team member will start a Slack thread between you, the nurse practitioner, and the collab team. All information regarding the collabs between you and the NP will be included here. This will provide specific information needed to make sure the collaboration agreement becomes activated. This also allows you to get to know who you are collaborating with. **It is very important that you check Slack daily, as there may be outstanding actions needed in order to make the collab live.**

Some states allow collaboration agreements to become active once signed by both parties. Here is a list of states where there is no board reporting component and the collaboration agreement is **active once signed**:

- Connecticut

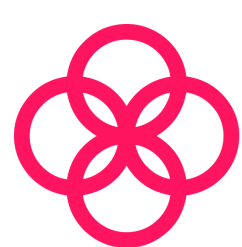


- Florida (partially)
- Georgia (partially)
- Illinois
- Massachusetts
- Michigan
- Missouri
- New Jersey
- New York
- Ohio (partially)
- Vermont
- Virginia
- Wisconsin

Board Specific Processes

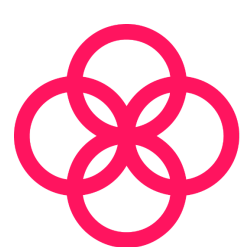
Some states have additional actions that need to be taken in order to get the collaborative agreement approved by the board. Each state has a different process. Below are the states that require additional actions with the board along with what actions will need to be taken by either the APP or the physician.

- Alabama
 - **Physician Requirements:**
 - 1. Apply for approval of an initial collaborative practice through your AL Licensee Portal;
 - 2. Log in using your last name and last five digits of your SSN
 - 3. Scroll down and click the "Apply CP" button - Click through the screens and make payment. OpenLoop will reimburse you for your payment.
 - Upon successful completion, the Certified Registered Nurse Practitioner's (CRNP) name will appear in the "License Information" section of your Licensee Portal CRNP Requirements.
- Arkansas
 - The NP will need to login to their account & upload the agreement into the portal. Once approval is received by the board, this will become active.
- Florida
 - While technically the collaborative agreement can be considered effective once signed, the board also requires the supervising

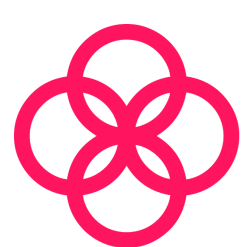


physician to submit a signed notice, initiating the collaborative agreement. This can be submitted via fax, which we will take care of once the signing is completed. This notice does not specify the name of APP or date the agreement was entered into. This is simply a notice to the board, updating your number of active collaborative agreements.

- Georgia
 - For Georgia, while technically effective when signed, we will be physically mailing a packet inclusive of the signed CPA, licensure copies, and a check to the GA Composite Medical Board for their full approval or their denial. You are allowed to practice under the agreement until one of those verdicts is sent back.
- Indiana
 - There is a board submission/approval component required for Indiana collaborative agreements. The NP will need to login to their IN portal, upload the agreement, and check back on the public search to see if the agreement was approved. The only way to verify the approval is by searching the NP license on the public search portal, then checking under the specific license if the new collaborator name is listed.
- Kentucky
 - After being signed by both the NP & physician, Kentucky requires both the collaborative agreement & the CAPA-NS forms to be uploaded to the NP Kentucky portal. The NP will receive approval. This cannot be verified publicly.
- Louisiana
 - After the collaboration agreement is signed electronically, both the collab physician and APP will need to sign the Attestation of APRN Collaborative Practice form. This needs to be done in wet ink (aka with pen). After this has been signed in pen by both parties, it will then need to be uploaded to the NP portal. They will receive a letter with approval by the board.
- North Carolina



- The NP will need to complete a physician maintenance request within their portal. After completion, they will check back to see once it has become approved.
- Ohio
 - There is "technically" not a filing requirement for the CPA, but they do request that the NP submits documentation denoting that a new collab agreement exists on the provider dashboard.
- Oklahoma
 - After the collaboration agreement is signed via DocuSign, additional forms will need to be notarized. There is a page within the DocuSign packet at the very end that will need to be notarized. The director of operations, Ben Brogger, is a notary and can notarize this with you online. After signing the DocuSign, he will set up a meeting that fits best with your schedule to get the Oklahoma form notarized. After submission, we will need to wait for the board to approve the collaboration.
- Pennsylvania
 - Pennsylvania requires multiple attestations within the PALS portal. First, the NP will need to go into their portal and submit the collaboration request. Then the collaborating physician will then need to go into their account and accept the request. After this, it will bump the application back to the NP, where they can complete the application and submit the fee. After submission, we will need to wait for approval by the board, which will be visible in the NP and physician's portal.
- South Carolina
 - After signing the DocuSign, the NP will need to submit the form within their SC portal. Once approved, the NP name will populate underneath the collaborating physician's name on the public search portal.
- Tennessee
 - The actual agreement itself doesn't need to be submitted to the board or approved. However, there is an online connection

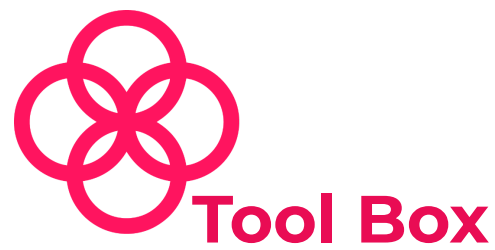


component that is required for TN. This can either be completed via electronic connection/approval submission within the NP's portal and then approved on the Physician's portal. This can also be done on the physician's end and completed immediately by entering the NP license number under their relationships.

- Texas
 - There is an online submission that is required for Texas on the TMB dashboard. The TX Board of Medicine recommends that the APRN initiate the request first (through the Board of Medicine portal <https://sso.tmb.state.tx.us/> - this will be a separate account from your Nursing Portal account) and then the Physician confirms the request in their account. It usually takes 24 hours to show on the public search after the request has been confirmed, however as long as the APRN and physician see the green checkmark on their TMB account, the collab is considered activated.

Termination of Collaboration

A collaboration agreement is usually terminated due to the nurse practitioner or the physician leaving OpenLoop. Only one party needs to sign the termination letter for it to become valid: the physician or the NP. OpenLoop is not responsible for terminating the agreements in the respective boards. Some boards only allow the NP to terminate inside the portal, while others only allow the physician to terminate. Here is a link to the termination cheat sheet that shows who is responsible for terminating the agreement within the portal: [Termination Cheat Sheet](#)



OpenLoop Email

OpenLoop's IT team will set up an OpenLoop email for you upon onboarding. **ALL** collaboration agreements will be sent via DocuSign to your OpenLoop email. Please make sure you are checking your OpenLoop email daily for pending collaboration agreements.

Slack

All communication for collaboration agreements will be sent via Slack. The IT team will also make sure you get access to Slack. Please update your Slack profile with your full name and title. Slack threads will be started between you, a nurse practitioner, and the collab team after the collaboration agreement between you two has been sent. This is an opportunity to ask any questions regarding this specific collab, meet who you are collaborating with, and find step-by-step instructions on how to set up your collab agreement. **It is very important that you check Slack daily.**

Platforms

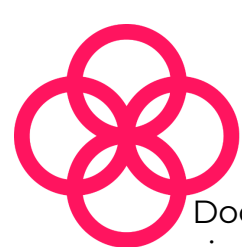
Notion Page

[Notion Page](#)

Please utilize this Notion link to access a handful of resources. Here you will find information on protocols, E-trainings for platforms like Healthie, and a breakdown of each active client and what they do. If for some reason you do not have access to Notion, contact Jennifer Harrison or our IT department so they can grant access.

DocuSign

Please note that **ALL** collaboration agreements will come from DocuSign. This will need to be sent to your OpenLoop email for quality assurance purposes. Upon receiving the DocuSign, you will be provided the contract from a collab team member who has already filled out the license and board certification information for both the collaborating physician and the NP. The



Docusign will prompt you to enter your personal address as well as a signature and date. Once the document is fully signed by **BOTH** parties, Docusign will automatically send you a copy for your records. Please download a copy and keep in your records for tracking purposes. OpenLoop will also maintain a copy of this in our internal systems. It is important to note two things:

- Not all collabs will be live once signed. Some states have additional requirements needed **AFTER** signing the document in order to get it approved by the board. Please refer to “Board Specific Processes” to better understand what else is needed for each state. **Collabs will not be eligible for pay until it is board approved or until we have met the requirements needed by the state** (only a few states only require the document to be signed and internally stored).
- If only one party has signed and the other has not, this document will not be effective. Both the NP and the collaborating physician need to sign the collaboration agreement before this document is finalized. You WILL receive the completed document every single time. If the completed document has not come through, then the other party has not signed yet.

Point of Contacts

Recruitment

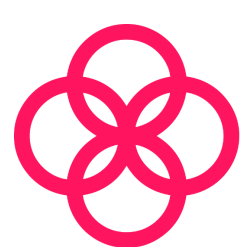
- Maximillian Ralston
- Emily Johnson

Credentialing

- Yvonne Mora

Licensing

- Ben Brogger
- Karla Mauricio
- Anasofia Nunez Sanchez



- Alyssa Rubio
- Rachel Cabrera
- Jonathan Werthmuller

Quality Assurance

- Yvonne Mora
- Ben Brogger

Collab Team

- Ben Brogger
- Arianna Sorrentino
- Rachel Cabrera
- Nikka Untalasco
- Allie Apland

Collab Pay

- Ben Brogger
- Mande Fischer