Get Started With MedTrainer Credentialing Software

You've made a great choice! We've helped thousands of healthcare organizations improve their credentialing process and you're next! Here's an overview of what to expect and what you'll need to get started on the right track.

Access	Onboarding Call	Train	Go Live	Stay in Touch
Receive login information and get a call from your customer success manager (CSM)	Confirm details with your CSM and get ready for training	You'll meet 2–3 times with your CSM to configure your platform	Once you've added your provider information, you're ready to go!	Meet regularly with your CSM to maintain best practices
Within 24 hours of contract signing	Start immediately for quick implementation	Start within 7 days if you're ready	Most customers are ready within 30–60 days	For the remainder of our relationship

Access

Account Creation and Introduction

- You'll get a welcome email within one business day, introducing your designated customer success manager (CSM) and providing contact information.
- Your CSM will reach out by phone on the same day to schedule your first onboarding meeting and confirm you can log into the platform.
- You'll receive a quick survey to complete as soon as possible so your onboarding team can streamline the process and meet your goals.

Onboarding Call

What To Have Ready for Your Onboarding Call

- Questions about anything in this document or the platform.
- Knowledge of your credentialing and enrollment processes in detail (required verifications, who will be monitored for exclusions, insurance products, etc).

Here's What To Expect in Your Onboarding Call

- An overview of your onboarding process.
- Review of your contract, including confirming products and user quantity.
- A detailed discussion on your credentialing and enrollment process so we can ensure the best platform set-up.

Train

What To Have Ready for Training

- Completed employee roster (spreadsheet provided by MedTrainer). Your CSM will upload all employees into the Employee Center (this must be done prior to training).
- List of your organization's locations with the associated NPIs and Tax IDs.
- All credentialing details for one provider that we will add as a demonstration. Make sure you have this provider's CAQH login information available, as well as five documents to upload, and all relevant dates (submission, contract, recredentialing, etc.).

  - ***Provider documents may include:*** *Acceptance Letter(s), Medical Board License & Certification, Driver's License, DEA License & Certification, Degree, Diploma, Hospital Affiliation Letter, Malpractice Insurance, Certificate of Liability Insurance, Peer Review and Recommendation Letters, Professional License(s).*

- List of provider/enrollment documents and exclusions required for one location.
- One report that you'd like to replicate (configure) within the MedTrainer credentialing platform.

Here's What To Expect in Training

- Set up the Organization Management module.
- A comprehensive overview of setting up Provider Profiles and familiarization with the platform.
- Map out a plan for the next training session (enrollments, custom forms, reporting, and dashboards are typically covered in the second training).

Go Live

Overview of How We'll Work Together

	What You Need	What MedTrainer Does	What You Do
Organization Management	• Up-to-date provider roster • List of your organization's locations with the associated NPIs and Tax IDs	• Add 2-5 locations for you • Upload an employee roster, which adds staff and providers to the Employee Center	Set up additional locations beyond the 5 set up by MedTrainer
Provider Information	• CAQH login information for all providers (or a plan to have them enter it into MedTrainer)	Create one full Provider Profile as a demonstration	Activate and set up additional providers and make changes moving forward
Provider Documents	• A form that you have mapped for auto-fill (within the Provider Profile) • Required documents by location • Provider documents organized in folders by provider (so it's easy to bulk upload)	Show you how to: • Upload documents for one provider individually and in bulk • Navigate the file staging area • Show how to auto-fill documents	• Upload all remaining provider documents and manage changes moving forward • Map all forms to enable auto-fill

	What You Need	What MedTrainer Does	What You Do
Enrollments	• Your process details to create a checklist (for one payer) • A list of payers by location to demonstrate the workflow of creating the enrollment	Show you how to: • Set up payers (by location) • Show you how to create enrollments individually and in bulk • Add details to enrollments including NPI (for new providers), notes, tasks, and payer contacts • Customize enrollment workflows, products, workflow states, and statuses.	Add all additional enrollments and make changes moving forward
Verifications	Verifications required by location	Show you how to set up required verifications for one location	Set up all additional locations and make changes moving forward
Exclusions	Exclusions required by location	Show you how to set up required exclusions for one location	Set up all additional locations and make changes moving forward
Privileging and Appointments	Privileges required by location and speciality	Show you how to: • Set up privileges and appointments for one provider • Create a Delineation of Privileges (DOP) form	Set up all additional providers and make changes moving forward
Reports and Dashboards	An existing report to replicate in MedTrainer	Show you how to: • Create one report • Showcase the features and customization of the reporting module • Showcase the feature and customization of dashboards	Set up additional reports and make changes moving forward

All MedTrainer customers receive basic customer support, which includes:

- Access to the training video library
- Access to the Support Center, available 24/7
- Live training via video
  (two hours per year)
- Periodic calls with your CSM
  (applicable to most MedTrainer Credentialing customers)

Upgrade to Standard Support or Premium Support for help with report configuration, provider profile creation, document upload, and configuration of insurance information.

Get details on MedTrainer support packages.

Stay in Touch

Stay up-to-date on the latest product information in the Customer Support Center.

Go

Watch step-by-step training videos.

Watch Now

Get monthly updates in the customer newsletter.

Suscribe

Contact Customer Service

Email: **support@medtrainer.com**
Phone: 844-596-6553

Contact Sales

Phone: 888-337-0288

MedTrainer