

# Roadmap to Success: Home Health Agency Setup Guide

From Award-Winning Experts



# HealthBridge™

## HOME HEALTH AGENCY SETUP GUIDE

*Your roadmap from concept to Medicare-certified agency*

### Welcome to HealthBridge

We handle the complex compliance work so you can focus on building your agency. This guide outlines each phase of your journey — what we take care of, and the small number of actions required from you. Questions at any stage? Visit us at [www.myhbconsulting.com](http://www.myhbconsulting.com).

## PHASE 1 — FOUNDATION & SETUP

STEP

1

FOUNDATION

### Establish Your Business Entity

#### YOUR RESPONSIBILITIES

- ▶ Rent an office space (speak with the consultant on specifics such as rooms, doors, sizing)
- ▶ Add office phone, fax, and a dedicated agency email address
- ▶ Form or update your Corporation to match your office address
- ▶ Obtain your Tax ID (EIN) from the IRS matching your office address
- ▶ Open a business bank account (specific minimum balance required for licensure and Medicare, speak with consultant on requirements)

#### HEALTHBRIDGE HANDLES

- ✓ We will guide you through the process, application of complex state and federal regulations
- ✓ All required manuals are included with your package

STEP

2

LICENSING

### License & Accreditation Application

#### YOUR RESPONSIBILITIES

- ▶ Provide lease copy, insurance certificate, and operating agreement
- ▶ Ensure both RN Administrator and Alternate Administrator qualify for the Home Health roles (speak with consultant on requirements)
- ▶ Monitor your agency email daily
- ▶ Complete staff background checks (speak with the consultant on requirements)

**HEALTHBRIDGE HANDLES**

- ✓ Prepare Licensure & Accreditation applications
- ✓ Prepare NPI application (processing up to 30 days)
- ✓ Prepare CLIA and Biomedical Waste license applications
- ✓ Prepare Emergency Plans
- ✓ Coordinate with accreditation company to schedule your survey

STEP

**3**

PREPARATION

**Pre-Survey Compliance Setup****YOUR RESPONSIBILITIES**

- ▶ Complete required Reports, Minutes, and Staff Training
- ▶ Sign Required Documentation
- ▶ Complete staff Clearinghouse background checks
- ▶ Administrator must be present for the pre-survey office review meeting

**HEALTHBRIDGE HANDLES**

- ✓ Provide all Policy & Procedure Manuals (Infection Control, Medical Device, Ethics, HIPAA, Emergency Mgmt., etc.)
- ✓ Provide S/U packs, D/C packs, Staff Handbooks, and all Health Compliance Posters
- ✓ Provide all Human Resources forms, applications, in-service/orientation materials, evaluations, and handbooks
- ✓ Conduct office meeting ~7 days before survey to review and practice
- ✓ Provide Virtual Consulting Web Meetings and access to for Annual Duties, Monthly/Quarterly duties, QA/PI activities, HR, minutes, committees, and emergency drills

## PHASE 2 — LICENSURE & FIRST SURVEY

STEP

**4**

SURVEY

### State License Accreditation Survey

**YOUR RESPONSIBILITIES**

- ▶ Call/email AO, NPI, and CMS, Department of Health as needed for application status and survey scheduling
- ▶ Keep agency email active and monitored — all communications come via email

**HEALTHBRIDGE HANDLES**

- ✓ Receive your State License
- ✓ Assist with Plan of Correction if needed (up to 5 deficiencies included)

STEP

**5**

MEDICARE

### Medicare Provider Application

**YOUR RESPONSIBILITIES**

- ▶ Maintain bank account funds (speak with consultant on requirements)
- ▶ Hire a qualified QA/PI staff member
- ▶ Monitor agency email daily for correspondence

**HEALTHBRIDGE HANDLES**

- ✓ Prepare Medicare application to CMS
- ✓ Include all required manuals: Wound Care Protocol, Fall Prevention, Medical Device
- ✓ Provide all documents via email as required for the application

## PHASE 3 — MEDICARE CERTIFICATION SURVEY

STEP

**6**

ACTIVATION

### Prepare for Medicare Certification Survey

**YOUR RESPONSIBILITIES**

- ▶ Accumulate 7 active patients and 3 discharged patients for the survey
- ▶ Complete all reports and compliance tasks per consultant's request
- ▶ Hire qualified staff

**HEALTHBRIDGE HANDLES**

- ✓ Continued Virtual Consulting Portal access and annual compliance duties until you pass this survey
- ✓ Office visit for survey-readiness check and Q&A review (phone/Zoom)

STEP

7

CERTIFIED

## Receive Your Medicare Provider Number

### YOUR RESPONSIBILITIES

- ▶ Allow surveyor access to patient homes
- ▶ Have Administrator available during survey review

### HEALTHBRIDGE HANDLES

- ✓ Accreditation company recommends your Provider status to CMS
- ✓ Office visit to take required photos of your facility
- ✓ Before issuing billing rights, HealthBridge will verify proof of funds
- ✓ You are now authorized to bill Medicare — and can also serve private pay clients
- ✓ Your accreditation is valid for 3 years

## KEY STAFF MEMBERS & POINTS AT A GLANCE

<b>Administrator</b>	Speak with Consultant on the Specific Qualification Requirements
<b>Alt. Administrator</b>	Speak with Consultant on the Specific Qualification Requirements
<b>QA/PI Staff</b>	Speak with Consultant on the Specific Qualification Requirements
<b>Bank Account</b>	Speak with Consultant on the Specific Requirements
<b>Software</b>	Speak with Consultant on the Specific Qualification Requirements
<b>Insurance</b>	Speak with Consultant on the Specific Qualification Requirements

**Ready to get started?**

[www.myhbconsulting.com](http://www.myhbconsulting.com)