

**SAMPLE Provider Service Plan (PSP) COVER SHEET**

**Provider Customer Service Program  
Provider Service Plan  
Contract Year (mm/dd/yy – mm/dd/yy)<sup>1</sup>**

**Contractor Name  
Contractor Number  
*Contractor Type (Carrier, FI, DME MAC or A/B MAC)*  
Contractor Address  
Contractor Web Address**

**PSP Coordinator: Name, Title  
Telephone number  
E-mail address**

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<sup>1</sup> For legacy Title XVIII contractors, the “contract year” is the Federal Fiscal Year.

## **Provider Service Plan**

Carriers / Fiscal Intermediaries / DME MACs / A/B MACs

### **Background**

Medicare Contractors are required to prepare and submit a Provider Service Plan (PSP) annually. The PSP must outline the strategies, projected activities, efforts, and approaches each contractor plans to use during the forthcoming year to support provider education and communications. The PSP should also include an evaluation of the strengths and weaknesses of the previous contract year's Provider Outreach and Education (POE) work, as well as how the findings from that evaluation were incorporated into the forthcoming year's educational plan. The PSP must address and support all the implementation strategies and activities stated in IOM 100-09, Chapter 6, sections 20, 40 and 50, as well as all required activities stated in the yearly Budget and Performance Requirements (BPRs) and, for MACs, Statements of Work (SOW). For the purposes of this report, the term "provider" refers to any organization, institution, or individual that offers health care services to Medicare beneficiaries including suppliers.

The plan must address the following elements of the Provider Outreach and Education Program and include descriptions of activities planned:

- A. Provider Data Analysis
- B. Provider Outreach and Education Activities
- C. Provider Education Resources
- D. Provider Education Technology
- E. Partnering with External Entities
- F. Provider Outreach and Education Advisory Group (POE AG) and "Ask-the-Contractor" Teleconferences (ACTs)
- G. Internal Development of Provider Issues
- H. Internal Staff Development and Training
- I. Other Provider Outreach and Education Activities

## **Guidance/Instructions for Reporting**

1. Your plan should not be a restatement of the question or topic but should be sufficiently detailed for CMS to be able to understand your education strategy and program needs in relation to your ongoing budget. Contractors who merely restate the questions in this document will have their PSP returned to them as non-responsive and will be deemed as not meeting the annual requirement.
2. Brevity is appreciated. If the question can be answered in a paragraph, no need to submit a multi-page response.
3. Multistate jurisdictions should submit one report. It is not necessary to submit a separate report for each state. However, state specific information should be clearly identifiable.
4. Try to keep the report to less than 20 pages.
5. Whenever possible, you may use links to information available on your website. The judicious use of attachments will not count toward the total page count.

## **Introduction/Past Performance**

Discuss the past year's contractor performance and its impact on your ongoing POE program. Provide specific information about last year's POE work and how lessons learned were incorporated into this PSP.

A. **Provider Data Analysis**

1. **Analysis of Error Rate Data**

- a. Describe the error rate data used in your analyses.
- b. Describe how you will use analyses of error rate data and other data sources to develop an education strategy. Please discuss any differences based on type of service (e.g. Physician services, Inpatient Hospital, Outpatient Hospital, etc.).
- c. What provider education do you plan to complete in the upcoming year in response to Recovery Audit Contractor (RAC) findings?
- d. Do you currently offer any training specifically related to error rate reduction? If yes, please provide the names of the courses and a brief description of each course.
- e. Do you currently track the number of unique providers that attend your in-person training events or take your web-based training courses? If yes, do you use this information to determine how you can better tailor your educational offerings? If no, why not and how difficult would it be to start tracking the number of unique providers?

2. **Inquiry Analysis (Telephone and Written Inquiries)**

- a. Summarize how you maintain a systematic and reproducible provider inquiry analysis program that produces a monthly list of the most frequently asked questions (FAQs) beyond basic claims status and eligibility for telephone inquiries and written inquiries.
- b. Provide examples of how you incorporated the findings from your inquiry analysis program into your provider education activities during the previous year. Did you make any changes to your inquiry analysis process based on your experience during the previous year?
- c. Describe how you use information in your inquiry tracking reports to shape your on-going provider education activities.

**3. Claims Submission Data Analysis**

a. Describe the process you will use to generate a monthly list of the most frequent claims submission errors from providers/suppliers. Claims submission errors are those that result in rejected, denied or incorrectly paid claims. How will this data be used within your provider education and outreach activities?

b. Provide examples of how you incorporated the findings from your claims submission data analysis program into your overall education plan during the previous year. Did you make any changes to your claims submission data analysis process based on your experience during the previous year?

**B. Provider Outreach and Education Activities**

a. Describe your plans for educating or training Medicare providers or their staff about Medicare policies, procedures and billing issues (including any training directed to new Medicare providers and billing staff, small providers, as well as education on Local Coverage Determinations, Medical Review referrals, Preventive Benefits, Remittance Advice, etc.)

b. In evaluating the type and frequency of education events over the last contract year, what education events were your most and least successful? Why? What successful educational activities do you plan to continue?

c. Provide a tentative schedule of activities to be held for the upcoming year by event type, date, location, and subject area(s). This information can be included as an attachment. A link to a schedule on your website is also acceptable.

**C. Provider Education Resources**

**1. Provider Bulletins and Newsletters**

a. Summarize your plans for developing and disseminating bulletins and/or newsletters including the frequency for which the bulletins/newsletters will be produced and distributed.

b. For those contractors who plan to charge for hard copies/individual subscriptions to their bulletins during the contract year, please describe your plans.

## **2. Provider Educational Materials**

- a. Discuss the educational resources (i.e., brochures, manuals, work and reference books, fact sheets, videos, audio tapes, CDs etc.) that will be made available for providers. Also discuss any plans to produce new provider education material or significantly revise existing ones.
- b. Discuss any feedback you received from providers, your POE AG members, Ask-the-Contractor teleconferences, association members etc. regarding your education materials in the previous contract year. Also explain any changes or revisions you implemented as a result of this feedback.

## **D. Provider Education Technology**

### **1. Provider Self -Service Technology**

- a. Summarize how you will use new technologies, electronic media, and Internet educational offerings (e.g. web casting, web-based conferencing and trainings and computer- based training) as an efficient, timely and cost-effective means of disseminating Medicare provider information.
- b. Discuss how you plan to improve or expand your website, listserv and other self-service options.
- c. For contractors who participate in the Website Satisfaction Survey, what changes, if any, do you anticipate making? Do you find the survey tool useful? If your website is scanned by Accenture, formerly Maxamine, what future enhancements do you plan to incorporate that may affect your website accessibility score?
- d. Discuss any feedback you received regarding any new technology or Internet offerings you provided in the previous contract year. Include those comments received from the feedback mechanism on your website. Also, explain any changes you implemented as a result of this feedback.

### **2. Electronic Mailing Lists/Listsers(s)**

- a. How do you plan to market your listserv to the provider community?
- b. How many unique participants do you have on your listserv as of the last day of the contract year? For legacy Title XVIII contractors, that is September 30<sup>th</sup>. Discuss any feedback you received regarding efforts to increase listserv participation in the previous contract year. Also, explain any changes you implemented as a result of this feedback.

c. What are your plans to keep listserv registrants current? What process do you have in place to update the listserv?

**E. Partnering with External Entities**

a. Provide the names of the organizations that you plan to work with in the upcoming contract year and what you hope to accomplish by partnering with them.

**F. Provider Outreach and Education Advisory Group (POE AG) and “Ask-the-Contractor” Teleconferences (ACT)**

**1. Provider Outreach and Education Advisory Group (POE AG)**

a. Describe how you ensure that your POE AG truly acts as a consultant resource that identifies salient provider education issues, and recommends effective means of information dissemination to your provider community.

b. What strategies will you use in the upcoming year to market the POE AG and ensure that the group’s composition reflects your provider population?

**2. “Ask-the-Contractor” Teleconferences (ACT)**

a. Discuss the format of your ACTs and how you plan to select topics.

b. Discuss the mechanisms you plan to use to evaluate and possibly implement suggestions and issues raised during the ACT. What process do you have in place to follow up on issues raised during the teleconferences?

c. What strategies will you use in the upcoming year to market the ACTs to your provider community?

d. What feedback from your ACT meetings did you incorporate into your strategy for hosting the teleconferences?

**G. Internal Development of Provider Issues**

a. Describe the process you have in place to coordinate education with the medical review staff. What processes do you have in place to maintain open communication and ensure timely feedback is provided? Additionally, what type of education do you foresee in the near future based upon medical review referrals?

b. Summarize how you plan to work with the various departments within your organization, to exchange information about provider issues. Specifically address the working relationship with the provider contact center. Discuss your plans to resolve any issues, and ultimately incorporate this information into your education activities.

c. What key issues, if any, were brought to your attention by other areas in your organization during the previous contract year that led to education efforts?

**H. Internal Staff Development and Training**

a. What are your training goals for the year for new and existing Provider Outreach and Education staff?

b. What evaluation mechanisms will be used to gauge the training needs of the staff and measure the effectiveness of the training provided?

c. Describe any successes and/or failures of the training plan used in the previous contract year.

d. Discuss your involvement, if any, with the development and dissemination of new hire and on-going training of Customer Service Representatives (CSRs), written correspondents, and Provider Relations Research Specialists (PRRS).

**I. Other Provider Outreach and Education Activities**

a. Discuss steps to improve satisfaction with POE as measured by the Medicare Contractor Provider Satisfaction Survey (MCPSS).

b. Describe any additional POE activities or efforts, not previously discussed, that you plan to undertake in the upcoming contract year.