

Sample Responsibility Matrix



	Area	Responsibility	Managing Partner	Front Desk Supervisor	Clinical Supervisor	TBD #1	TBD #2	TBD #3	IT Manager
1	Billing	Weekly Billing Department Meeting							
2	Billing	Bank Deposit Preparation				X			
3	Billing	Bank Deposit Delivery				X			
4	Billing	Billing Department Issues				X			
5	Billing	Collection Policies				X			
6	Billing	Daily Deposit Summary Sheets				X			
7	Billing	Delayed Charge Submission Review	X						
8	Billing	EoB Review				X			
9	Billing	Hospital Charge Entry				X			
10	Billing	Mail Receipt Deposits				X			
11	Billing	Oversight of Billing Department							
12	Billing	Patient Financial Policies				X			
13	Billing	Patient Payment Posting				X			
14	Billing	Practice Fee Schedule Review							
15	Billing	RCM Liaison				X			
16	Billing	Reporting of direct deposits to Billing Department							
17	Billing	Review of Key Performance Indicators (KPI's)							
18	Clinical	AED Machines Checked			X				
19	Clinical	Asthma Action Plans			X				
20	Clinical	CLIA Certification			X				
21	Clinical	Clinical Staff Education			X				
22	Clinical	Clinical Staff Onboarding			X				
23	Clinical	Clinical Staff Scheduling			X				
24	Clinical	Clinical Staff Skill Competency			X				
25	Clinical	CPR Card Expirations							
26	Clinical	CPR Training			X				
27	Clinical	Crash Cart Compliance			X				
28	Clinical	Developmental Screening Program			X				
29	Clinical	EMR Templates	X						
30	Clinical	Hearing Screening Equipment			X				
31	Clinical	Lab - Review Lab Manuals			X				
32	Clinical	Lab Records- Quality Logs			X				
33	Clinical	Lab- Staff Competency Review			X				
34	Clinical	Medical Equipment Calibration			X				
35	Clinical	Medical Supply Inventory			X				
36	Clinical	Medical Supply Ordering			X				
37	Clinical	O2 Tank Levels Checked			X				
38	Clinical	Obesity Action Plans			X				
39	Clinical	Patient Information Sheets						X	
40	Clinical	Patient No Shows						X	
41	Clinical	Phone Triage Compliance			X				
42	Clinical	Phone Triage Process			X				
43	Clinical	Sample Medication Expiry Checked			X				
44	Clinical	Skills Testing For Clinical Staff			X				
45	Clinical	Staff Incident Reporting							
46	Clinical	Stock Medication Expiry Checked			X				

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47	Clinical	Vaccine Discount Buying Group Liaison							
48	Clinical	Vaccine Inventory (Private)			X				
49	Clinical	Vaccine Inventory (VFC)			X				
50	Clinical	Vaccine Ordering			X				
51	Clinical	Vaccine Temperature Logs (Daily)			X				
52	Clinical	VFC Reconciliations (Monthly)			X				
53	Clinical	Vision Screening Equipment			X				
54	Credentialing	Determine Present Participation In Plans & Hospital Privileges					X		
55	Credentialing	Modify/Update CLIA License As Needed					X		
56	Credentialing	Submit Applications For Hospital Privileges					X		
57	Credentialing	Update Federal Narcotic License					X		
58	Credentialing	Update Managed-Care Provider Notify Of Change In Provider Status/Ownership/TIN					X		
59	Credentialing	Update Medicare And Medicaid Provider Application (Billing Tin)					X		
60	Credentialing	Update Membership In County Medical Society (If Needed)					X		
61	Credentialing	Update Membership In State Medical Association (If Needed)					X		
62	Credentialing	Update NPI Listing					X		
63	Credentialing	Update State Medical License					X		
64	Credentialing	Update State Narcotic License					X		
65	Facilities	Alarm/Security Company Liaison					X		
66	Facilities	Break Room Furniture					X		
67	Facilities	Exam Room Furniture			X				
68	Facilities	Eye Wash Station Flushed			X				
69	Facilities	Fire Extinguishers Checked (Annually)			X				
70	Facilities	Flashlights & Batteries Checked			X				
71	Facilities	Handyman- Minor Repairs					X		
72	Facilities	Landlord Issues					X		
73	Facilities	Office Furniture Repairs/Replacement					X		
74	Facilities	Snow Clearing							
75	Finance	Finance Committee Meeting Agenda							
76	Finance	Finance Committee Meeting Facilitation							
77	Finance	Accountant Liaison							
78	Finance	Accounts Payable- Drafting Checks					X		
79	Finance	Accounts Payable- Entering Invoices					X		
80	Finance	Accounts Payable- Signing Checks	X						
81	Finance	Bank Deposit Reconciliation							
82	Finance	Bank Loans / LoC Management/Oversight							
83	Finance	Banking Liaison							
84	Finance	Budget Variance Report							
85	Finance	Cash Management							
86	Finance	Checkbook Reconciliation							
87	Finance	Community Donations/Charity Gifts	X						
88	Finance	Compilation, Analysis & Presentation of Practice Financials							
89	Finance	Complimentary access to IntelliTraq Dashboard System							
90	Finance	Daily/Monthly Financial Reporting							
91	Finance	Deposit Reconciliation (Bank Account vs. Billing System)							
92	Finance	Employed Provider Bonuses							

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93	Finance	Employee Bonus Escrow							
94	Finance	Financial Reporting				X			
95	Finance	GL / Billing System Reconciliation							
96	Finance	Negotiating Contracts With Providers							
97	Finance	Owner/Partner Bonuses							
98	Finance	Preparation of Annual Budget							
99	Finance	Quarterly Tax Planning Review							
100	Finance	Review P&L Report							
101	Finance	Review Usage of Evaluation & Management Codes							
102	Front Office	Appointment Scheduling Guidelines		X					
103	Front Office	Counter Receipt Deposits		X					
104	Front Office	Credit Card Services				X			
105	Front Office	Front Office Staff Scheduling		X					
106	Front Office	New Patient Registration						X	
107	Front Office	Receptionist Training		X					
108	HR	401(K) Enrollment							
109	HR	401(K) Loans							
110	HR	401(K) Annual Testing							
111	HR	Profit Sharing							
112	HR	Annual Corporate Compliance Training							
113	HR	Annual OSHA Training							
114	HR	Background Checks							
115	HR	Bi-Weekly Overtime Report	X						
116	HR	Calculating Employee Bonus Distribution Total							
117	HR	Clinical Staff Licensure							
118	HR	Daily Attendance Report							
119	HR	Employee Benefit Package Summary (Benefits, PTO, etc.)							
120	HR	Employee Complaints/Issues							
121	HR	Employee Discipline							
122	HR	Employee Gifts/Flowers					X		
123	HR	Employee Handbook Updates							
124	HR	Employee Inventory Review							
125	HR	Employee Name Tags							
126	HR	Employee & Provider Payroll Processing							
127	HR	Employee & Provider Payroll Corrections							
128	HR	Employee Personnel File Maintenance							
129	HR	Employee Portal							
130	HR	Employee Satisfaction Surveys							
131	HR	Employee Time Off Tracking							
132	HR	Exit Interviews							
133	HR	Health Insurance Renewals							
134	HR	In Person Interviews (New Hires)		X	X				
135	HR	Insurance- Physician Disability	X						
136	HR	Job Description Maintenance							
137	HR	Leave Of Absence Qualification/Tracking							
138	HR	Merit Based Bonus Template/ Incentives							

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139	HR	New Hire- Benefit Review							
140	HR	New Hire- Corporate Compliance Training							
141	HR	New Hire- Employee Acceptance Letter							
142	HR	New Hire- Employee Background Checks							
143	HR	New Hire- Facility Orientation							
144	HR	New Hire- Functional Area Orientation		X	X				
145	HR	New Hire- Handbook Review/Signature							
146	HR	New Hire I-9							
147	HR	New Hire Initial HIPAA Training							
148	HR	New Hire Initial OSHA Training							
149	HR	New Hire- Online Competency Screenings							
150	HR	Organizational Chart Maintenance							
151	HR	Phone Interviews (New Hires)							
152	HR	Scheduling (Clinical Staff)			X				
153	HR	Scheduling (Non Clinical)		X					
154	HR	Staff Performance Evaluation							
155	HR	Staff Salary Schedule							
156	IT	Advanced End User Technical Support							X
157	IT	Computer Network Orientation (Save files, printers, etc.)				X			
158	IT	Copier Issues & Lease							
159	IT	Outside IT Vendor Liaison							
160	IT	Employee Computer Training Assessment							
161	IT	Employee/Physician Email Accounts							X
162	IT	EMR Licensing							
163	IT	HIPAA - LayerCompliance.com Subscription							
164	IT	HIPAA Annual Risk Assessment							X
165	IT	HIPAA Ongoing Compliance Oversight in Conjunction With IT Vendor							
166	IT	Initial End User Technical Support		X	X	X			X
167	IT	Network Issues							X
168	IT	Network Support Service Agreements							
169	IT	Network Vulnerability Scans							
170	IT	PCI Compliance Monitoring							
171	IT	PCI Quarterly Scans							
172	IT	Phone System Planning & Implementation in Conjunction with Vendor							
173	IT	Printer Issues							X
174	IT	Review Equipment Purchase Quotes To Ensure Appropriate Pricing							
175	IT	Scanner Issues							X
176	IT	User Account Review (EMR)							
177	IT	User Account Review (Network)							X
178	IT	User Account Set Up (EMR)							
179	IT	User Account Set Up (Network)							X
180	Legal	Legal Liaison (Corporate)	X						
181	Legal	Shareholder Buy-In Agreements	X						
182	Legal	Shareholder Buyout Agreements	X						
183	Legal	Shareholder Operating Agreements	X						
184	Marketing	Checkup Packets						X	

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185	Marketing	Letterhead						X	
186	Marketing	Marketing						X	
187	Marketing	Marketing Budget						X	
188	Marketing	Social Media Management						X	
189	Marketing	Stationary						X	
190	Marketing	Website Development						X	
191	Marketing	Website Edits						X	
192	MCO	Managed Care Contract Abstracting							
193	MCO	Managed Care Contract Analysis							
194	MCO	Managed Care Contract Negotiation							
195	MCO	MCO Network Incentive Payments							
196	MCO	MCO Network Manager Meetings							
197	Operations	Answering Service Issues					X		
198	Operations	Corporate Compliance							
199	Operations	Credit Card Terminals		X		X			
200	Operations	Insurance- Disability							
201	Operations	Insurance- EPLI							
202	Operations	Insurance- General Liability							
203	Operations	Insurance- Malpractice	X						
204	Operations	Insurance- Worker's Comp							
205	Operations	Insurance- Worker's Comp Audit							
206	Operations	Local Business License(s)					X		
207	Operations	Office Supply Ordering		X			X		
208	Operations	Patient Complaints		X	X				
209	Operations	Patient Complaints- Billing				X			
210	Operations	Patient Complaints- Clinical			X				
211	Operations	Patient Complaints- Provider	X						
212	Operations	Patient Incident Reporting		X	X				
213	Operations	Printing Needs (Letterhead, Stationary, Cards)						X	
214	Operations	Smoke Detectors Checked		X					
215	Physicians	AAP Memberships					X		
216	Physicians	Hospital Credentialing					X		
217	Physicians	Hospital Relations	X						
218	Physicians	Local & State Licenses					X		
219	Physicians	MCO Provider Credentialing					X		
220	Physicians	Medical Society Updates					X		
221	Physicians	Physician Annual CPT Training Meeting	X						
222	Physicians	Physician Call Schedule					X		
223	Physicians	Physician Cell Phones/Pagers					X		
224	Physicians	Physician Expense Reimbursement					X		
225	Physicians	Physician Vacation Schedule					X		
226	Physicians	Provider Coverage Issues	X				X		
227	Physicians	Provider Recruitment	X						
228	Physicians	Provider Salaries							
229	Physicians	Provider State Licensure					X		
230	Reporting	Daily Charges, Payments & Adjustments Posted							

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231	Reporting	Daily Provider Appointment Counts							