



SUMMIT POINTE POLICY AND PROCEDURE MANUAL

Section: Provider Network	Policy Name: Credentialing Records and Confidentiality	Policy Number: 1.2.3	
Owner: Director of Provider Network	Applies To: <input checked="" type="checkbox"/> Summit Pointe Staff <input checked="" type="checkbox"/> Summit Pointe Contract Providers <input checked="" type="checkbox"/> Summit Pointe CCBHC Services <input checked="" type="checkbox"/> Summit Pointe CCBHC DCO Providers		
Approved By: <i>Jann Woodcock</i>			
Version Number: 4	Last Review Date: 01/30/2026	Revised Date: 01/30/2026	First Effective Date: 11/01/2018

I. **PURPOSE:**

To ensure confidentiality of all aspects of the credentialing process. Each credentialed provider (individual or organizational) will have an individual record maintained that will be kept confidential. To establish guidelines for document retention.

II. **DEFINITIONS:** Refer to the "Summit Pointe Policy and Procedures Definitions Glossary."

III. **POLICY:**

All records and proceedings of the Credentialing Committee are confidential and protected.

IV. **PROCEDURE:**

Standards and Guidelines:

Credentialing files and information, along with minutes and records of the Credentialing Committee meetings, will be maintained in a secure environment with limited access.

Summit Pointe will maintain confidentiality of all aspects of its credentialing process. Each credentialed provider will have an individual record maintained that will be kept confidential.

Credentialing records, including Credentialing Committee meeting minutes, will be kept for a minimum of seven (7) years after the termination of employment or contractual relationship. Hard copies of credentialing materials may be destroyed by shredding after being kept for a minimum of seven (7) years.

Copies, hard and/or electronic records will be stored in a secure format. Hard copy records will be kept in locked cabinets. Electronic records will be maintained in password protected environments. Only Summit Pointe designated staff who have responsibilities associated with credentialing shall have access to these records. At no time will other staff have access to these records. Use of temporary personnel will be allowed only after they have received proper training on confidentiality of records and have signed a confidentiality statement. Training will be documented.

Electronic records will be restricted to relevant personnel according to organization protocols. Only authorized personnel, on a need-to-know basis, will be granted access to the electronic credentialing files. Documents may be stored within the Universal Credentialing Customer Relationship Management (UC-CRM) system. Access is approved upon hire by the designated Leadership member.



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Any contracted provider with delegated credentialing functions will maintain their records with the same confidentiality aspects and will be monitored during on-site inspections to ensure the confidentiality of records being maintained.

Credentialing Committee Members with access to the credentialing information will be required to complete confidentiality training and sign a confidentiality statement to preserve confidentiality. This training will be documented.

Staff members with access to credentialing information will be required to undergo training regarding the confidentiality of information.

While completing the responsibilities of the credentialing process, Summit Pointe staff or Credentialing Committee Members may encounter individually identified health information. If this occurs, employees and Committee Members may only use the information for purposes necessary to conduct Summit Pointe business and are required to preserve the confidentiality. This will be included in the confidentiality statement that is signed regarding performing as a Committee Member.

V. **REFERENCES:**

SWMBH Operating Policy 02.5, 02.6
42 CFR 422.204
42 CFR 438.12

VI. **ATTACHMENTS:**

Confidentiality Statement Form