Meeting Recording Policy

Company: DOC Credentialing, LLC **Effective Date:** July 27, 2026 **Approved By:** Ashley Bye, Owner & Founder **Policy Number:** DOC-OPS-003

Purpose

This policy establishes the standard for recording client consultations and meetings conducted by DOC Credentialing, LLC. Recordings serve as an accurate record of discussions, commitments, and instructions exchanged during the credentialing and provider enrollment process, supporting quality assurance, compliance documentation, and client service continuity.

Scope

This policy applies to all meetings, consultations, and calls conducted by DOC Credentialing, LLC staff — including but not limited to:

- Initial consultations with prospective clients
- Onboarding meetings with new clients
- Follow-up calls regarding active credentialing applications
- Any scheduled or ad hoc meeting involving client-specific credentialing information

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Policy Statement

All meetings conducted by DOC Credentialing, LLC are recorded for quality assurance and compliance purposes. Recording begins at the start of each session and is stored securely in accordance with our HIPAA-compliant data retention practices.

Required Disclosure

At the opening of every meeting, the DOC Credentialing staff member must state the following verbatim before proceeding with the agenda:

> **"This meeting is being recorded for quality and compliance purposes."**

This disclosure must be made before any substantive discussion begins. Proceeding with the meeting constitutes the participant's acknowledgment of and consent to the recording.

Client Objection Procedure

If a client or prospective client declines or objects to the recording at any point during the meeting, the staff member must pause the discussion and respond with the following statement:

> **"Our company policy requires recorded documentation to proceed with this type of consultation. If you prefer not to be recorded, we can reschedule and interact via email."**

Available Alternatives

When a client declines recording, staff must offer one of the following options:

1. **Email Correspondence** — The consultation is discontinued and all discussion is moved to written email exchange, providing a documented record for both parties.

Documentation Requirement

Regardless of which alternative is selected, a written record of the client's objection and the chosen alternative must be logged in the client's file within 24 hours of the meeting.

Recording Storage and Access

- All recordings are stored in DOC Credentialing's secure, HIPAA-compliant file system.
- Access is restricted to authorized DOC Credentialing staff only.
- Recordings are retained in accordance with applicable state and federal record-keeping requirements.

- Recordings will not be shared with third parties without the written consent of the client, except where required by law.

Staff Responsibilities

Responsibility	Accountable Party
Deliver required disclosure at meeting start	All staff conducting client meetings
Initiate and verify recording is active	Staff member prior to discussion
Respond to client objections per this policy	All staff
Log objections and alternative chosen	Staff member within 24 hours
Secure and store recordings appropriately	Ashley Bye / designated staff

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Non-Compliance

Failure to follow this policy — including failure to disclose the recording, failure to offer alternatives upon objection, or failure to document client objections — may result in corrective action and must be reported to Ashley Bye immediately.

Policy Review

This policy will be reviewed annually or whenever a significant change in applicable law, technology, or business operations warrants an update.

DOC Credentialing, LLC — Confidential Internal Policy Document