



THE PEER REVIEW CLINIC

PAUL VERARDI & PHIL ZARONE

HORTY  SPRINGER

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Center for Continuing Education in the Health Sciences and HortySpringer Seminars.

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Highlighted Topics

After decades of ineffective, inefficient, and resented peer review, a new day has dawned for many Medical Staffs! Whether the issue is clinical quality, conduct, health, or utilization, it is *actually possible* to:

- (1) Create new processes that achieve the two major goals of peer review: *enhancing patient safety/quality of care and promoting physician success*, and
- (2) Demonstrate tangibly to a Medical Staff that modern peer review is the way that practitioners learn from each other and improve systems of care, and that the process is *pro-patient, not anti-physician!*

The Peer Review Clinic is high energy and engaging, filled with real-life case studies, videos, and interactive presentations, and packed with practical, experience-tested tips and tools that you can take home and immediately put to use!

Join us and explore *modern, effective, and constructive* peer review and head back home with answers to questions such as:

- What are the common and traditional problems that generally condemn a peer review process to failure? (At the top of that list is *“scoring!”*)
- What specific techniques have been demonstrated to constructively resolve *clinical* issues, *behavior* concerns, *health* challenges, and *utilization* problems? Which common approaches do *NOT* work?
- Do the rules change when a physician is *employed* by the Hospital (or by an exclusive contract provider)?

- What is a *Leadership Council* and should we have one? (*YES!*)
- Is there any role for *Clinical Departments* in the process? (*MAYBE!*)
- Who are the best individuals to serve on a *Multi-Specialty Peer Review Committee*? Who should *NEVER* serve on the committee?
- Why should the *MEC* and *Board* play almost no role in a modern process?
- Does the “traditional way” of managing *conflicts of interest* work? (*NO!*)
- What concrete, practical steps best prevent the risk of *retaliation*?
- How can we help great physicians become *effective case reviewers and Medical Staff leaders*? (*Hint*: Several straightforward tips, education, and new case review forms!)
- How does the revised *National Practitioner Data Bank Guidebook* impact our process?
- Why do *utilization management* and *medical necessity* need to be core components of a modern process when traditionally they have not?
- What options do we have for handling the red hot/white hot issue of *aging practitioners*?
- And many, many more!

Who Should Attend?

- Medical Staff Officers
- Department Chairs
- CMOs and VPMAs
- Peer Review Committee Members
- Medical Executive Committee Members
- Credentials Committee Members
- Quality Improvement Specialists
- Medical Staff Services Professionals

Participation by all individuals is encouraged. Advance notification of any special needs will help us provide better service. Please notify us at least *two weeks* in advance of the program.

Schedule/Accreditation

DAY ONE

- Top 10 Reasons Why “Peer Review” of Clinical Issues Generally Doesn’t Work – Self-Assess and Compare to Your Current Processes Back Home
- Defining the Broad Scope of “Peer Review”:
 - Clinical Quality
 - Professional Conduct
 - Health and Aging
 - Utilization Management
- So, What Does Work for Clinical Issues? Best Practices Including These Components:
 - PPE Specialists
 - Leadership Council
 - Clinical Specialty Reviewers
 - Multi-Specialty PPEC
- Do’s and Don’ts for Effectively Obtaining Practitioner Input – and What to Do if a Practitioner Won’t Cooperate!
- Role of the MEC and Board in a Modern PPE Process – PPE Aggregate Reports
- Scalable Options: One Size of PPE Doesn’t Fit All
- Managing “Conflicts of Interest” in a Modern, Effective Manner – the Traditional Approach Simply Does Not Work!

DAY TWO

- Incorporating the “Progressive Steps Continuum” as a Well-Defined Component of Your Processes Is a Major Key to Success!
- A Successful, Face-to-Face “Collegial Intervention” Requires Four Steps – You Didn’t Learn This in Medical School!
- Collegial Intervention Demonstration and Practice Session (Case Studies)
 - Should Collegial Interventions Be Documented? How?
 - Practitioner Access to Their Confidential Files
 - Agreements Not to Retaliate
- Performance Improvement Plan (PIP) Options for Effectively Addressing Clinical Quality Issues
- Time to Practice – You Are the World’s Largest PPEC! (Case Studies)
- The Physician Behavior-Patient Safety Connection: No Bigger Sea Change Than Here!
- Core Components of an Effective Professionalism Policy and the PIP Options for Conduct Issues That Actually Work!
- Recommended Processes for OPPE and FPPE to Confirm Competence and Professionalism

DAY THREE

- How to Go Back Home and Implement the New PPE Processes – Lessons Learned from Many Trenches!
- The “Employed Physician” Conundrum: Tips and Options for Addressing Clinical and Conduct Concerns When the Practitioner Is Employed
- Yes, Utilization Management and Medical Necessity Issues Are Core Components of Modern PPE Too!
- Health Issues and a Modern Practitioner Health Policy
- Step-by-Step-by-Step MEC Investigation Process... When You Need to Do One (Case Study)
- Responding to Reference Inquiries from Other Hospitals When a Colleague Has Participated in a PIP
- What’s Reportable to the NPDB? Does the Revised Guidebook Change Anything?
- The Law Is on Your Side! But Take Several Straightforward Steps to Ensure Protection!
- Top Tips for Confidentiality, Including the Challenges of a Modern Electronic World

Educational Intent

This program is intended for Department Chairs, Medical Staff Officers, Peer Review Committee members, CMOs, VPMA’s, Quality Improvement specialists, Medical Staff Professionals and any other individuals involved in the peer review process. Upon completion of this program, participants should be able to identify “best practices” for medical staff peer review and recognize potential legal risks or inefficient or ineffective peer review procedures.

Continuing Education Credit

This activity has been planned and implemented in accordance with the accreditation requirements and policies of the Accreditation Council for Continuing Medical Education (ACCME) through the joint providership of the University of Pittsburgh School of Medicine and HortySpringer Seminars. The University of Pittsburgh School of Medicine is accredited by the ACCME to provide continuing medical education for physicians.

The University of Pittsburgh School of Medicine designates this live activity for a maximum of 11.25 *AMA PRA Category 1 Credits™*. Physicians should claim only the credit commensurate with the extent of their participation in the activity.

Other healthcare professionals are awarded 1.125 continuing education units (CEUs) which are equal to 11.25 contact hours.

NAMSS Accreditation

This course has been approved for National Association of Medical Staff Services (NAMSS) continuing education credit. Accreditation of this educational content in no way implies endorsement or sponsorship by NAMSS. This program is hereby awarded 11 NAMSS continuing education credits.

Faculty



PAUL VERARDI

Paul Verardi is a partner with the law firm of Horty, Springer & Mattern in Pittsburgh, Pennsylvania, which specializes in the practice of hospital and health care law. For over 30 years, Paul has devoted his entire practice to Medical Staff matters. He has worked extensively with Medical Staff leaders from across the country on a wide variety of credentialing, privileging, peer review, and investigation matters, as well as on the review and revision of Medical Staff Bylaws and the redesign of peer review systems in order to make them more constructive and effective. Paul had the privilege of serving as a founding faculty member of HortySpringer's *The Complete Course for Medical Staff Leaders* for 17 years. He currently serves on the faculty of the firm's *The Peer Review Clinic*, a course devoted to teaching and promoting best practices for addressing issues of clinical competence, professionalism, health, and utilization management that arise on all Medical Staffs. He has conducted numerous other national and individual hospital Medical Staff retreats. Paul has also had the privilege of previously serving as a member of the Board of Directors for the National Association Medical Staff Services. Prior to joining Horty, Springer & Mattern, Paul obtained his undergraduate degree from Duquesne University in 1983, graduating *summa cum laude*. He then obtained his law degree from the Duquesne University School of Law in 1986. While in law school, he served as Associate Articles Editor for the *Duquesne Law Review*.



PHIL ZARONE

Phil Zarone, B.A. University of Pittsburgh (*summa cum laude*, Phi Beta Kappa), (1989); M.A., Ohio State University (1994); J.D., University of Pittsburgh (*cum laude*) (1998). Mr. Zarone is a partner with Horty, Springer & Mattern in Pittsburgh, Pennsylvania. He has served as an officer in the United States Coast Guard and as a regulatory counsel and prosecuting attorney for the Commonwealth of Pennsylvania's Bureau of Professional and Occupational Affairs. He works extensively with hospitals and physician leaders on compliance with federal and state regulatory requirements and medical staff matters. He serves as a faculty member for Horty Springer's Peer Review Clinic and has spoken frequently about credentialing, peer review, and other topics of interest to physician leaders. He teaches a health law class for the Master of Medical Management program at Carnegie Mellon University and has taught a health law class at the Duquesne University School of Law.

Presenter Disclosure Statement

All individuals in a position to control the content of this education activity are required to disclose all relevant financial relationships with any proprietary entity producing, marketing, re-selling, or distributing health care goods or services, used on, or consumed by, patients.

Seminar Schedule

Day One

6:30 TO 8:00 AM –
Registration & Continental Breakfast
8:00 AM TO NOON – Seminar Session
9:45 TO 10:00 AM – Break
NOON – Day 1 Adjourns
5:30 TO 6:30 PM – Informal Reception

Day Two

7:00 TO 8:00 AM –
Continental Breakfast
8:00 AM TO NOON – Seminar Session
9:45 TO 10:00 AM – Break
NOON – Day 2 Adjourns

Day Three

7:00 TO 8:00 AM –
Continental Breakfast
8:00 AM TO NOON – Seminar Session
9:45 TO 10:00 AM – Break
NOON – Seminar Adjourns

Registration

\$1,595 Individual
\$4,950 for team of four
\$950 for each additional registrant after
a team of four registration

How to Register

(Registration form can be found online at
www.hortyspringer.com)

Fax 412-687-7692

Phone 800-245-1205

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4614 Fifth Avenue
Pittsburgh, PA 15213

Online www.hortyspringer.com

2019

SEMINARS

This schedule is subject to change.

January 24-26, 2019

The Ritz-Carlton | Naples

- The Complete Course for Medical Staff Leaders
- The Peer Review Clinic
- Credentialing for Excellence
- Strategies for Managing Physician Health and Disruptive Conduct

For reservations at the Beach Resort, please call 1-877-590-8187. Room Rate: \$499

For reservations at the Golf Resort, please call 1-877-557-3092. Room Rate: \$499

March 7-9, 2019

Disney's Yacht and Beach Club Resort | Orlando

- The Complete Course for Medical Staff Leaders
- The Peer Review Clinic
- Credentialing for Excellence
- Strategies for Managing Physician Health and Disruptive Conduct

For reservations, please call 407-939-4686. Room Rate: \$325

April 11-13, 2019

The Ritz-Carlton | New Orleans

- The Complete Course for Medical Staff Leaders
- The Peer Review Clinic
- Credentialing for Excellence
- Physician-Hospital Contracts Clinic

For reservations, please call 800-826-8987. Room Rate: \$359

November 21-23, 2019

Bellagio | Las Vegas

- The Complete Course for Medical Staff Leaders
- The Peer Review Clinic
- Credentialing for Excellence
- Strategies for Managing Physician Health and Disruptive Conduct

Attendees have the option of booking reservations via the Contact Center or a Custom-Built

Passkey Website. Contact Center: 1-888-987-6667 or Passkey: <https://book.passkey.com/e/49813765>

Room Rates: Tuesday/Wednesday, November 19-20: \$219

Thursday/Friday/Saturday, November 21-23: \$199

Hotel Reservations

All registrants are responsible for making their own hotel reservations. Special group room rates have been established for HortySpringer registrants. The special group rate rooms are available until 30 days from the seminar date, or until the room block sells out, whichever comes first. Within 30 days of the program, you may not be able to get rooms or receive the special rate.

THE PEER REVIEW CLINIC

Hospital Name _____
Street Address _____
City/State/Zip _____
Phone # _____ Fax # _____
Contact Person _____
Title _____
E-Mail _____

NAMES OF REGISTRANTS

(Please give full names and titles as you would like them to appear on name tags.)

1. Name/Degree/Title _____
E-Mail _____
Date Attending _____
2. Name/Degree/Title _____
E-Mail _____
Date Attending _____
3. Name/Degree/Title _____
E-Mail _____
Date Attending _____
4. Name/Degree/Title _____
E-Mail _____
Date Attending _____

PAYMENT

(\$1,595 Individual; \$4,950 for a team of four, \$950 for each additional registrant after a team of four registration)

Visa Mastercard American Express
Card Number _____ Security Code _____ Exp. _____
Name on Card _____

Check enclosed. *(Please make payable to HSM Enterprises.)*

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