



Medical Staff Leader Orientation & Toolkit

March 14, 2024
8:00 a.m. – 3:00 p.m. ET

SAMPLE VIRTUAL SEMINAR AGENDA

LEADERSHIP ESSENTIALS (8:00 A.M. – 10:00 A.M. ET)
Rachel Remaley and LeeAnne Mitchell

LEGAL PROTECTIONS FOR MEDICAL STAFF LEADERS

THE BOARD'S ROLE IN MEDICAL STAFF FUNCTIONS

MANAGING CONFLICTS OF INTEREST IN CREDENTIALING AND PEER
REVIEW: A METHODOICAL, PRACTICAL APPROACH

DOCUMENTING MEDICAL STAFF ACTIVITIES

- *What Goes in Credentials Files – and Where Are They Kept?*
- *What Goes in Practitioners' Quality Files – and Where Are They Kept?*
- *What about Health Information?*
- *How to Maximize Confidentiality and Privilege*
- *Inviting Practitioners to Meet*
- *Documenting Collegial Counseling and Other Interventions*
- *Meeting Minutes*
- *Investigation Reports*
- *Interview Summaries*
- *Adverse Professional Review Action: Minutes and Notice*
- *And more!*

THE PEER REVIEW CONTINUUM: AN OVERVIEW

- *Routine Peer Review: A Collegial and Educational Process*
- *Investigations*
- *Adverse Professional Review Actions*
- *NPDB Reporting*
- *Giving References (Especially When You Don't Have Anything Nice to Say)*

BREAK – 10:00 A.M. to 10:15 A.M. ET

CREDENTIALING ESSENTIALS (10:15 A.M. – 12:15 P.M. ET)

Lauren Massucci and Mary Paterni

CREDENTIALING FOR EXCELLENCE

- *Spotting and Following Up on Red Flags: The Application of Dr. Hotmas*
- *Credentialing Tips: Tools for Addressing Difficult Credentialing Issues*
 - *Using Threshold Eligibility Criteria/Waivers*
 - *Managing Incomplete Applications*
 - *Aligning the Employment and Medical Staff Processes*
 - *Dealing with Misstatements and Omissions*
 - *Using the Telephone to Obtain Meaningful Information*
 - *Conditional Appointments*

TACKLING TOUGH PRIVILEGING ISSUES

- *Privileging Principles and Establishing Criteria for Clinical Privileges*
- *Case Studies on Clinical Privileges for New Procedures, Clinical Privileges that Cross Specialty Lines, and Privileging Advanced Practice Providers*

BREAK – 12:15 P.M. to 12:30 P.M. ET

PEER REVIEW PRIMER (12:30 P.M. – 2:30 P.M. ET)

Ian Donaldson and Charles Chulack

PEER REVIEW OF CLINICAL CONCERNS THAT PROTECTS PATIENTS AND HELPS YOUR COLLEAGUES SUCCEED

- *The value of a hospital-wide multi-specialty peer review committee*
- *Checks and balances – and accountability – in peer review*
- *Save leader time through delegated preparation and triage*
- *The importance of making notice and opportunity for input a mandatory, not optional, part of the review process*
- *Fostering consistency through central repositories, reports, and oversight, use of assigned reviewers, use of review forms, and detailed identification of indicators for review*
- *What role do traditional department chairs play in modern peer review?*

TIPS FOR CONDUCTING MENTORING EFFORTS AND COLLEGIAL COUNSELING

PERFORMANCE IMPROVEMENT PLANS – PURPOSE AND IMPLEMENTATION

REVIEWING PROFESSIONALISM AND PRACTITIONER HEALTH ISSUES

LIVE Q&A – 2:30 P.M. to 3:00 P.M. ET