

EDUCATIONAL PRESENTATIONS BY KATHY MATZKA, CPMSM, CPCS

Temporary Privileges and Expedited Credentialing: Meeting Patient Need without Compromising Patient Safety

1 to 1.5 Hour Program

Every healthcare organization will one day be in a position where it is necessary to grant temporary privileges to locum tenens or telemedicine providers in order to meet patient care needs. Typically, in these cases, credentials verification must be completed in a short timeframe while complying with accreditation and regulatory requirements. This session will equip the MSP with the knowledge and tools to handle this difficult and challenging issue.

This presentation discusses Joint Commission requirements for granting temporary privileges and expedited credentialing, and NCQA provisional credentialing. Discussion will include "red flags" to be aware of, sample policies for implementing temporary privileges and expedited credentialing, and barriers to functional credentialing processes.

At the completion of this program, participants will be able to:

- Distinguish the difference between temporary privileges and expedited credentialing
- Identify Joint Commission requirements for temporary privileges and expedited credentialing
- Describe NCQA standards for provisional credentialing
- Evaluate current credentialing processes to determine efficient and effective processes
- Develop a process for expedited credentialing that meets Joint Commission requirements

Medical Staff Meeting Management

1.5 to 4 Hour Program

This program covers the basics of agenda preparation, communication with key speakers or presenters, the roles of the chairman/MSP/members, use of scheduling software, taking and transcribing minutes compliant with Joint Commission and NCQA standards, record retention, and basics of understanding and evaluating the cost of meetings vs. the benefit. Can be structured as an overview or a half day workshop.

Credentialing Allied Health and Complimentary and Alternative Medicine Providers

1 to 1.5 Hour Program

We often hear that credentialing for AHP and CAM providers should be done the same as for other providers. Unfortunately, it is not always that easy. These providers make for some interesting challenges for the MSP. This program begins with a history of the use of AHPs and CAM providers and discusses ways to effectively credential and privilege them. Topics include classifying allied health professionals and CAM providers, Joint Commission and NCQA standards, federal laws (Medicare, NPDB/HIPDB), defining the role of the AHP, establishing community need, acceptance by hospital ancillary staff and medical staff, documenting competency, privileges vs. job descriptions, supervision/proctoring/monitoring, credentialing sources, and recredentialing/reappointment/reappraisal.

Effective Communication and Networking

1 to 1.5 hour Program

All situations are dependent in some way on the conveyance of meaning and information. Everyone communicates, but some people are more skilled at this than others. This program focuses on effective communication including barriers, breakdowns, feedback, verbal and non-verbal communication, listening and ways to make sure that the information we communicate is meaningful to the receiver. We will discuss in detail how the human resources department evaluates requests for salary changes and how to communicate the importance of the role of the MSP in these evaluations. Networking skills will be discussed including, building and maintaining your network.

Evaluating Meeting Effectiveness and Restructuring of Committees

1 to 1.5 Hour Program

Participants will learn how to evaluate the effectiveness versus the cost of the meeting and ways to improve attendance. This seminar includes lectures, demonstrations, and practice activities. Each participant receives a workbook with helpful aids and suggested forms. Topics include:

- Evaluating the cost of meetings vs. the effectiveness/accomplishments
 - Knowing when not to meet
 - Increasing medical staff participation
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Credentialing/Recredentialing and Privileging Basics

1.5 to 6 Hour Program

This program covers all aspects of credentialing and recredentialing including, bylaws, policies, rules & regulations, qualifications/application, verification/review of information, peer review process, due process, temporary privileges. A great program for the new credentialer, a refresher for the seasoned professional, and good resource for those sitting for NAMSS' CPMSM/CPCS exams who wish to learn more about accreditation standards and how they are applied. The full day program includes interactive hands-on sessions reviewing an application for "red flags" and applying credentialing criteria in both the hospital and managed care settings. Can be presented as a 1.5 hour overview or a full day (6 hour) comprehensive course.

Advanced Credentialing and Privileging Concepts

2 to 4 Hour Program

This program covers advanced concepts in credentialing and privileging including:

- Developing an Effective Privileging Process
 - Evaluating and Documenting Practitioner Competency
 - Documenting Recommendations
 - Proctoring
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Understanding the Peer Review and Performance Improvement Processes

1 to 1.5 Hour Program

The peer review process is often misunderstood and mistaken for the performance improvement process. While closely intertwined and sometimes overlapping, they are two separate processes.

- List the difference between peer review and performance improvement
- Discuss protection under the law for the peer review process
- Discuss how to protect the confidentiality of PI and peer review activities

Credentials File Audits: Tools and Techniques for Credentialing Compliance

1 to 1.5 Hour Program

Although time consuming, credentialing audits play an important role in oversight of the credentialing process. Even the most experienced professionals make mistakes and overlook things – it's part of human nature. In some cases, an element, such as primary source verification of licensure, is completed but the documentation does not get placed in the credentials file. Or perhaps an issue requiring follow-up is identified, but is forgotten when a more urgent issue presents itself. A slip like this can make for a finding of non-compliance on an accreditation survey.

At the completion of this program, participant will be able to:

- Using supplied templates, develop customized tools for conducting audits of the credentialing function and process
- Evaluate the credentialing process to determine where delays occur and develop strategies to overcome these delays
- Using supplied templates, construct presentation tools to show the results of credentialing audits for presentation to medical staff leaders, credentials committee, medical executive committee and governing body

Hot Topics in Credentialing and Privileging

1 to 2 Hour Program

This program will provide an overview “hot topics” in credentialing and privileging such as, the following examples:

- Hot areas in Joint Commission and NCQA standards for credentialing and recredentialing
- Credentialing and privileging AHPs including APRNs and PAs
- Identifying and responding to “red flags”
- Turf Battles – How to draw the line when granting privileges that cross boundaries
- Handling “problem” practitioners
- CMS privileging requirements

Can be a 1 to 2 hour discussion, depending on your time constraints.

Due to hot topics coming up on a routine basis, this list can be modified at any time prior to the or during the conference. If your organization wishes to discuss an issue

related to medical services, I am ready!! Let me know what issues are important or relevant to your members and I will customize this presentation to meet your members' needs. I like to include a lot of interaction and encourage audience discussion and questions during the program. This program can also be structured as an informal networking session.

Keeping Medical Staff Bylaws Current

1 Hour Program

This program will provide an overview of the requirements of the Joint Commission, American Osteopathic Association Healthcare Facility Accreditation Program (AOA-HFAP), and Medicare Conditions of Participation pertaining to bylaws content. The process for developing and implementing bylaws changes will be discussed. In addition, current "hot topics" in credentialing and privileging and their effect on medical staff bylaws will also be discussed.

Program objectives:

At the completion of this program, the participant will be able to

- Identify the requirements of the Joint Commission, American Osteopathic Association Healthcare Facility Accreditation Program, and Medicare Conditions of Participation pertaining to bylaws content.
- Evaluate current medical staff bylaws in light of accreditation changes
- Recognize the difference between an administrative procedure and a process and determine which steps need to be included in medical staff bylaws.
- Discuss current "hot topics" regarding medical staff privileging and credentialing and how they relate to bylaws.

Documenting Provider Competency in Privileging

1.5 to 2 Hour Program

One of the biggest challenges medical staffs face is evaluating the competency of providers. While it is relatively easy to verify licensure, malpractice history, and hospital affiliations, it is difficult, or sometimes impossible, to come up with useful competency data. The increased focus on quality by accrediting organizations, the government, and the public, emphasizes the need for continual monitoring of the quality of services provided as well as having a strong privileging system.

At the completion of this program, participants will be able to

- Evaluate the benefits and weakness of various privileging systems
- Develop effective proctoring and provisional appointment processes

- Recognize the importance of acquiring procedural data – and of supplying this data to other hospitals
 - Understand how demographic and citizenship information fit into the quality profile
 - Interpret CMS requirements for privileging
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MSPs Take Charge: Defining and Communicating Your Value

1 to 1.5 Hour Program

MSPs Take Charge: Evaluating and Communicating Your Value will equip the MSP with the tools and information needed to evaluate current job responsibilities, define the value of services provided, and most importantly, put it all together for presentation to the people who make the decisions regarding salary increases and upgrades in job classifications.

Upon completion of this lecture, the attendee should be able to:

- Understand basic communication dynamics and define skills that will improve communication
 - Identify key approaches to making and keeping strategic career contacts
 - Develop an effective communication strategy for getting noticed and acknowledged
 - Perform an evaluation of current duties and responsibilities to define value as an employee
 - Identify the factors used by human resources department personnel in evaluating salary grade and pay scale and write a request for salary review addressing each of these issues.
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Understanding Negligence in Credentialing

1 to 1.5 Hour Program

This program will discuss past and recent negligent credentialing lawsuits and their impact on the credentialing practices. Legal aspects of negligence in credentialing will be explored. At the completion of this program, the participant will:

- Understand the concept of negligence in credentialing
 - Be able to discuss the process that is followed after a negligent credentialing claim is filed
 - Know the role the medical services professional will play in the discovery process
 - Understand the elements of a negligent credentialing claim
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Overview of Joint Commission Standards for Hospital Medical Staff

2 to 4 Hour Program

This program will acquaint the participant with the Joint Commission standard for the hospital medical staff as included in the Comprehensive Accreditation Manual for Hospitals. Included are examples of forms, policies, and procedures to help comply with standards.

Can be a 2-hour brief overview or a comprehensive 4-hour program with discussion and networking time.

This program can also be tailored to include only these standards that are not contained in the Medical Staff Chapter (1.5 hour program).

Objectives

- Identify the medical staff's role in standards that are contained outside the medical staff chapter
- Discuss strategies for compliance with standards in day-to-day operations
- Discuss the standards scoring process
- Discuss key issues related to compliance with standards

Applying Critical Thinking Skills to Avoid Confirmation Bias in Credentialing Decisions

1 to 1.5 Hour Program

Transparency in the credentialing process refers to allowing the general public access to the processes the organization uses to assure that only qualified, competent individuals are allowed to provide patient care, treatment, and services. Publishing its policies and procedures results in a more informed patient community and a greater degree of organizational accountability. Confirmation bias should be avoided in the credentialing and privileging processes because it can lead poor decisions based on debatable information. One way to avoid confirmation bias is to apply critical thinking skills in credentialing and privileging decisions. This may mean taking the “unpopular” stance on an issue, having to admit that a decision was wrong, or confronting a superior about a decision made. Although these can be uncomfortable actions, failure to admit and correct mistakes can lead to public ridicule and can cause distrust of the organization's ability to provide safe, effective patient care. All credentialing and privileging decisions should be made in such a way that the organization can be proud of putting them on display to the public. This program is geared toward medical staff leaders, healthcare administrators, and medical services professionals.

Objectives:

At the completion of this program, the participant will be able to:

- Utilize critical thinking skills in making credentialing and privileging decisions to help avoid “confirmation bias” in making credentialing decisions
- Define the meaning of transparency as it relates to credentialing
- Recognize how transparency can lead to greater compliance with policies and procedures

Leadership in MSP Succession Planning: Ensuring your Organization has the Talent it needs for the Future

1 Hour Program

Succession planning is an integrated, systematic approach to identify, develop, and retain talent for key positions and areas to meet current and projected business objectives. This includes making sure medical services professional are educated and equipped to meet the challenges of credentialing, privileging, and medical staff support in this age of public scrutiny. It is important that organizations include key medical services professionals in succession planning, provide educational opportunities, and enhance leadership skills. Since educational programs for MSPs are limited, many get their training on the job. This emphasizes the importance of making sure that the MSP is educated and equipped with the skills necessary to meet the challenges of medical staff support in this age of public scrutiny and increased negligent credentialing claims. This program will explore the importance of assuring that competent personnel are recruited and trained to fill critical positions in medical staff services.

Objectives

At the conclusion of this program, the participant will:

- Understand the purpose of succession planning
- Identify the steps in succession planning
- Know the necessary tools for development of a succession plan
- Identify ways to enhance an employee’s leadership skills through formal and informal methods
- Have basic information and knowledge needed to discuss of succession planning with administrators

Understanding Telemedicine Credentialing Options

This 1.5 hour program will discuss the options and requirements for credentialing telemedicine practitioners under the CMS regulations, Joint Commission and HFAP standards. It will include a discussion of required policies, procedures, and bylaws language.

The program will be provided for the medical services professionals of Capella Healthcare's 14 hospitals. No fee will be charged to the participants for this educational presentation.

Objectives:

- Discuss CMS regulations, Joint Commission, and HFAP requirements for credentialing telemedicine practitioners
- Develop policies and procedures for credentialing telemedicine practitioners that meet CMS regulations and accreditation requirements

Comparison of Joint Commission and Det Norske Veritas Healthcare's NIAHO Accreditation Standards for the Medical Staff

1 to 1.5 Hour Program

This program will provide an overview and comparison between Joint Commission Hospital Accreditation Standards and Det Norske Veritas National Integrated Accreditation for Healthcare Organizations (NIAHO) hospital accreditation standards related to the medical staff.

At the completion of this program, the participant will be able to:

- Discuss the Det Norske Veritas' NIAHO program
 - Identify the similarities and differences between the Joint Commission and NIAHO accreditation standards related to the medical staff
 - Recognize credentialing processes that may need to be changed if considering a change from Joint Commission to DNV NIAHO accreditation
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MSP Career Progression: Is Consulting the Right Next Step for You?

1 to 1.5 Hour Program

Although many MSPs have a vision of self employment and of providing consulting services, there are no resources available to help the MSP in this decision. This two-part program will explore the hard facts and reality of what is required to become an effective and successful consultant. The program is designed to provide a high-level overview of the roles, responsibilities, rewards, and risks of consultancy. Part I will equip the participant with the background information necessary to make a reasoned decision as to whether or not a career in consulting should be pursued. Part II will provide a detailed overview of the fine points of providing services as a consultant including setting up the business. Adequate time for questions and discussion will be provided.

At the end of the program, the participant will be able to:

- Identify the qualifications and wide-ranging competencies required to be an effective consultant.
 - Define the necessary steps to establish a small business and develop a dynamic business plan.
 - Recognize the risks and benefits of consultancy.
 - Evaluate whether or not being an MSP consultant is an aspect of your career to pursue.
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LET ME TELL YOU A LITTLE ABOUT MYSELF!!

I am a speaker, consultant, and writer with over 20 years of experience in credentialing, privileging, and medical staff services. I hold certification by the National Association Medical Staff Services (NAMSS) in both Medical Staff Management and Provider Credentialing. I worked for 13 years as a hospital medical staff coordinator before venturing out on my own as a consultant, writer, and speaker.

I have authored and contributed to a number of books related to medical staff services including *Compliance Guide to Joint Commission Medical Staff Standards*, *The Medical Staff Meeting Companion: Tools and Techniques for Effective Presentations*, *The Credentialing and Privileging Desk Reference*, *The Credentials Verification Desk Reference*, and *The Chapter Leader's Guide to the Medical Staff: Practical Insight on Joint Commission Standards*.

I have enjoyed working with NAMSS' Library Team developing and editing educational materials related to the field including CPCS and CPMSM Certification Exam Preparatory Courses, CPMSM and CPCS Professional Development Workshops, and NAMSS Core Curriculum. These programs are essential educational tools for both new and seasoned medical services professionals. I also serve as instructor for NAMSS.

I serve on the editorial advisory boards for two publications - *Briefings on Credentialing and Credentialing*, *Peer Review Legal Insider*, .

In my role as an educator I have developed and presented over 150 programs for professional associations, hospitals, and hospital associations on a wide range of topics including provider credentialing and privileging, medical staff meeting management, peer review, negligent credentialing, provider competency, and accreditation standards.

I know how much work goes into planning an educational conference. I also know that many employers continue to cut back on paying for continuing education for their employees. Many of your members will be paying their own way for your conference. As such, I work very carefully to keep travel expenses down. Since I offer a variety of course selections, your organization can save on travel expenses (which are typically more than speaker fees) by having one speaker cover a number of topics.

Finally, due to budgetary constraints, some hospitals do not have the financial capability to send employees to a conference. I am happy to work with any hospital or organization that would wish to arrange a conference at their facility either prior to or following your state conference.

Please contact me if I can help you with your next conference!!!

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All topics can be customized to fit YOUR time constraints.

Is there a topic that your members are wanting but you haven't been able to find a speaker? I can customize a lecture to meet your members' needs!

Can't decide on which topic to place at that hard-to-fill spot right after lunch? NO PROBLEM! All programs are enhanced by creative use of graphics, humor, and real-life examples to keep the attention of your audience.

WHAT PEOPLE ARE SAYING

Following are recent comments received regarding educational presentations given by Kathy Matzka

- Until I heard you speak, I was actually considering leaving MSS but during the conference you gave me fabulous guidance and tools to turn our area of credentialing into a positive, proactive and rewarding environment.
- Mrs. Matzka is a very confident and knowledgeable speaker. Good job!
- Detailed coverage of subject. Knowledgeable speaker.
- Well-researched, enthusiastic presenter.
- Kathy's interaction with the group is great!
- Information current and expressed well. Kathy's experience is an asset.
- Kathy is fabulous! All the info was most valuable in helping me in my job.
- Explanations and answers were spontaneous and she definitely knows her job.
- Informative, knowledgeable speaker. Creative slides.
- Excellent speaker, good visuals and handout.
- It's nice to have a speaker who's one of us.
- Kathy's positive attitude is infective!
- The best speaker we've ever had – She was “real”.
- Fantastic speaker!
- I walked away with a wealth of information.
- What a great addition and honor to have Kathy travel and share her wealth of knowledge! GREAT CHOICE! Thank you. Can't wait to hear more from her.
- Excellent speaker – very concrete examples and helpful suggestions
- I really enjoy Kathy – her enthusiasm and expertise!
- Best presentation on this topic I've heard yet!
- She was very 5-star performance – awesome speaker. Thanks very insightful and knowledgeable.
- Excellent learning session. I think we all came away with learning something new.
- Bring Kathy back for additional topics.