

EDUCATIONAL PRESENTATIONS BY KATHY MATZKA, CPMSM, CPCS

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

1 - 1.5 Hour Presentation

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:

- Develop mechanisms for verifying credentials and documenting competency in an abbreviated timeframe
- Apply Joint Commission, AOA-HFAP, and CMS requirements for temporary privileges and telemedicine
- Develop mechanisms for documenting competency for locum tenens, telemedicine, and other providers

Credentialing Allied Health and Complimentary and Alternative Medicine Providers

1-2-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 1½ -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.

Medical Staff Meeting Management

1 – 2 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 combined with Evaluating Effectiveness and Restructuring of Committees (see next section).

Evaluating Meeting Effectiveness and Restructuring of Committees

1- 1 ½ -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

2-4 Hour Presentation

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 an effective study tool for those sitting for NAMSS' CPMSM/CPCS exams who wish to learn more about accreditation standards and how they are applied. Includes an interactive hands-on sessions reviewing an application for "red flags" and applying credentialing criteria in both the hospital and managed care settings. A great opportunity to invite medical staff credentials committee members to your state program! Can be presented as a 2 hour overview or a ½ day (4 hour) comprehensive course.

Hot Topics in Credentialing and Privileging

1 ½ - 3-Hour Presentation

This program will provide an overview "hot topics" in credentialing and privileging including:

- 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

The 2-3 hour program will provide a work session for identifying red flags where an application will be reviewed, red flags identified and discussed.

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.

Understanding the Peer Review and Performance Improvement Processes

1 ½ – 2 Hour Presentation

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. This program will cover the steps in both processes including, Joint Commission Ongoing and Focused Practitioner Review, CMS requirements, provisional appointment, proctoring, and legal protections afforded by state and federal regulations.

MSPs Take Charge: Keys to Professional Development and Self Promotion

1 ½ – 2 ½ – Hour Presentation

Are you looking for something different from the usual technical presentations? MSPs Take Charge will equip the MSP with the tools needed to enhance professional and personal skills.

This fast-paced presentation includes various aspects of professional development as it relates to the Medical Services Professional (MSP) including leadership skills, enhancing professional image, personal growth and development, formal and informal educational opportunities, and self-promotion.

The “promoting yourself” section of this program also makes a great lunch topic. If you are looking for a fast-paced motivational topic for your lunch program, a one-hour version of this program makes a great “lunch-and-learn” topic!

Medical Staff Bylaws and other “Hot Topics” in Credentialing and Privileging Affecting Bylaws Content

1 ½ – 2 ½ – Hour Presentation

In a November 12, 2004 memo to its survey agency directors, the Centers for Medicare & Medicaid Services (CMS) provided very specific instructions regarding privileging and medical staff bylaws content. This memo initiated changes in hospital accreditor’s standards requiring specific processes to be contained in the medical staff bylaws that might currently be contained in other medical staff documents. These changes require hospitals to take a good look at their current privileging process and what is documented in the medical staff bylaws. 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 as defined by Joint Commission 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.

Provider Competency in Privileging

1 ½ – 2 Hour Presentation

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

MSSPs Take Charge: Defining and Communicating Your Value

MSSPs Take Charge: Evaluating and Communicating Your Value will equip the MSSP 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.

Current Issues in Negligent Credentialing

1-1.5 hour program

This program will discuss past and recent negligent credentialing lawsuits and their impact on the credentialing practices. 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

CREENTIALING AND PRIVILEGING GRAND ROUNDS

1½ - 2 Hour Presentation

Summary:

This program will allow participants to experience unusual or important credentialing and privileging “cases” through education and social interaction. Those present will be given an opportunity to discuss current issues plaguing their facilities and utilize the experience and knowledge of their colleagues and the presenter to “diagnose and treat” these problems. Also includes a discussion of case studies and discussion of current national issues.

Educational Objectives:

- Provide a forum for discussion of current issues in credentialing and privileging
- Increase awareness and understanding of current issues
- Provide examples various types of issues, thus providing the individual with a tool to create his or her own personalized “treatment plan” for those issues.
- Summarize practical application of the basic knowledge of credentialing and privileging issues while updating fundamentals and keeping updated on recent issues.

NOTE:

Those participants who wish to present a case will be given the option of presenting a 5-10 minute verbal summary of their case at the conference or providing a written discussion of the issue to be presented by the moderator. Participants will be asked to provide issues that they would like to discuss at the seminar in advance, if possible. This will allow the moderator to analyze the situation and prepare adequately for the discussion and allow allocation of adequate time for discussion of each case. As such, the conference brochure should include the following:

“Those who wish to present a case or discuss an issue should prepare a 5-10 minute summary which should be provided to (program chair name) at (program chair email) in advance of the conference. If the participant wishes to be anonymous or does not feel comfortable with presenting at the conference, the moderator will present the case. This will allow allocation of adequate time for discussion of each case or issue. Additional cases/issues from the floor will be discussed after the cases presented in advance, time permitting.”

Overview of Joint Commission Standards for the Hospital Medical Staff

2- 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.

Objectives

- Obtain knowledge of the Joint Commission's standards relating to the medical staff
- Understand the medical staff's role in patient-focused functions
- Discuss strategies for compliance with standards in day-to-day operations
- Understand the standards scoring process
- Discuss key issues related to compliance with standard

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

1-1.5 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
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Applying Critical Thinking Skills to Avoid Confirmation Bias in Credentialing Decisions

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.

Educational 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

Tools and Techniques for Effective Presentations at Medical Staff Meetings

This program will provide an overview of techniques and tools for effectively planning, managing, and facilitating medical staff meetings. Medical staff leaders, hospital administrators, and governing body members are assigned a tremendous responsibility – overseeing the medical care provided in the hospital. In today's healthcare environment, there is a plethora of data available. In fact, there are so much data that leaders can suffer from "information overload". One of the most difficult challenges faced in the hospital is how to present the data needed to make critical decisions in a concise, easy to understand way.

Educational Objectives

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

- Discern how to use tools to present data in a meaningful, easy to interpret manner
- Utilize tools to increase efficiency in communicating with and presenting data to the medical staff and within hospital organization
- Develop fresh ideas in collecting and presenting data at medical staff, hospital quality, and governing body meetings

Performing Credentials file Audits

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

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 a number of books related to medical staff services including both the fifth and sixth editions of the *Compliance Guide to Joint Commission Medical Staff Standards*, and *The Medical Staff Meeting Companion: Tools and Techniques for Effective Presentations*. For the past eight years, I have been the contributing editor for *The Credentials Verification Desk Reference*.

I have performed extensive work with NAMSS' Library Team developing and editing educational materials related to the field including CPCS and CPMSM Certification Exam Preparatory Courses, NAMSS Core Curriculum, CPMSM and CPCS Professional Development Workshops, and Independent Study Programs. These programs are for both new and seasoned medical services professionals. I also serve as a speaker and instructor for NAMSS.

I serve on the editorial advisory boards for three publications - *Briefings on Credentialing*, *Credentialing*, *Peer Review Legal Insider*, and *Advisor for Medical and Professional Staff Services*.



As an educator, I have developed and presented over 100 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.

I can also customize and moderate a certification study group prior to or following your conference to meet the educational needs of your members who are interested in this option.

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 call me if I can help you with your next conference!!!

Kathy

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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

- 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.
- Bring Kathy back for additional topics.
- 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.