The Credentialing Resource Center Symposium is back and better than ever!

The Credentialing Resource Center Symposium provides medical staff professionals and physician leaders the opportunity to discover, discuss, and share best practices. Refine and strengthen your medical staff policies and procedures with guidance from experts Hugh Greeley; Carol S. Cairns, CPMSM, CPCS; Sally Pelletier, CPMSM, CPCS; and Todd Sagin, MD, JD.

In-depth sessions, inspiring keynotes, and engaging rapid-fire question-and-answer sessions address a spectrum of topics including:

- Credentialing and peer review in the outpatient world
- Privileging advanced practice professionals
- Running an effective credentials committee
- Managing disruptive practitioner behavior
- Focused professional practice evaluations (FPPE) and ongoing professional practice evaluations (OPPE)
- Top industry concerns and pain points

Hotel Information

Hyatt Regency Orlando
9801 International Drive
Orlando, FL 32819
http://orlando.regency.hyatt.com

Reservations: 888-421-1442

Discounted room rate: $209 + $9 resort fee

For the discounted room rate, reservations must be made by March 16, 2016. Be sure to mention HCPro to receive the discounted room rate. Rooms are available on a first-come, first-served basis and often sell out before the March 16 cutoff date. Make your hotel reservations immediately to guarantee rate and availability.

To register or for more details, please visit www.credentialingresourcecenter.com/events or call us at 800-650-6787. Please use source code MT326107 when registering.
Overview and Benefits
After attending the symposium, you will be able to:

- Understand the effects the changing healthcare environment has on credentialing and competency assessments
- Spot red flags on a medical staff application
- Protect your institution from negligent credentialing suits
- Build communication and collaboration between MSPs and medical staff leaders
- Create effective OPPE and FPPE processes that are meaningful to physicians and less onerous
- Modify FPPE processes to gather more useful information and reduce the need for corrective action
- Understand what to do with “zero data” and learn tips for collecting competency data
- Gain insight on how to avoid common committee mistakes and solutions to correct them
- Understand the difference between verifying practice history and obtaining a professional reference

- Recognize and manage impaired practitioners
- Improve your peer review processes to reflect changing medical staff models
- Update and streamline your credentialing and privileging systems
- Compare your medical staff policies and procedures, rules and regulations, and bylaws to those required by CMS and top accreditors
- Understand the similarities and differences between advanced practice professionals and physicians
- Produce and support credentials committee members who are well versed in credentialing and understand the important role they play in patient safety

Pricing Options

Sign up by February 4, 2016 and save $100

Early Bird Rate: $895 (by February 4, 2016)
Regular Individual Rate: $995
Early Bird Group: $3,580 (5 for the price of 4)
Group: $3,980 (5 for the price of 4)
CRC Members: $895/$795 (early bird)

Who Should Attend

- Medical staff professionals
- Physician leaders
- Quality professionals
- Previous symposium attendees

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### Day 1

#### Welcome and Introductions

**Hugh Greeley; Carol S. Cairns, CPMSM, CPCS; Sally Pelletier, CPMSM, CPCS; and Todd Sagin, MD, JD**

This session will set the stage for the Symposium by introducing fictitious practitioner Jane Adele to attendees. New and past attendees to the CRC Symposium will learn of Jane’s previous work history and discretions and what she’s been up to since leaving Las Vegas. By following Jane’s career, attendees will put theory and best practices to the test using realistic medical staff scenarios.

#### Practitioner Credentialing and Competency Assessment in the 21st Century

**Hugh Greeley and Todd Sagin, MD, JD**

Practitioner credentialing is more important and more difficult than ever. Hugh Greeley and Todd Sagin will discuss the effects the changing healthcare environment has on credentialing and competency assessment. Discussion points include quality and safety trends, the growth in litigation, the increase in nonphysician practitioners, how to collect physician competency data in a less hospital-centric world, the move to physician employment and value-based payment, and the challenges created by outdated medical staff structures.

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<thead>
<tr>
<th>Track 1 - Credentialing &amp; Privileging, Legal &amp; Accreditation</th>
<th>Track 2 - Practitioner Performance &amp; Leadership</th>
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</table>
| 9:45 – 10:45 a.m. **Verify & Comply: Understand, Implement, and Comply With Medical Staff Requirements**  
*Carol S. Cairns, CPMSM, CPCS, and Sally Pelletier, CPMSM, CPCS* | 9:45 – 10:45 a.m. **Challenges at the Time of Appointment and Reappointment**  
*Hugh Greeley and Todd Sagin, MD, JD* |
| This session provides a thorough explanation of the biggest pain points in CMS regulations and accreditors’ medical staff and credentialing standards. Attendees will learn the similarities and differences between each accreditors’ requirements and gain compliance best practices. The speakers will provide strategies for acing standards compliance. | Spotting red flags during a medical staff application review may come easily, but the next steps aren't always so simple. Attendees will learn what to do after identifying risk areas. This session will discuss how to solve challenges that often arise while reviewing a physician’s application for initial appointment or reappointment, such as deciphering malpractice history findings, obtaining references from other hospitals, and getting physicians to submit complete applications. The speakers will also discuss how to present this information to appropriate medical staff leaders and committees. |
| 10:45 – 11:00 a.m. **Break** | 11:00 a.m. – 12:00 p.m. **Reengineering FPPE to Make It Effective and Rational**  
*Hugh Greeley and Todd Sagin, MD, JD* |
| 11:00 a.m. – 12:00 p.m. **Two High-Risk Credentialing Situations to Manage: Temporary and Locum Tenens Privileges**  
*Carol S. Cairns, CPMSM, CPCS, and Sally Pelletier, CPMSM, CPCS* | 11:00 a.m. – 12:00 p.m. **Lunch (provided)** |
| Credentialing and privileging professionals are tasked with ensuring all privileges requests—no matter how temporary—are thoroughly reviewed. During this session, the speakers will explain how granting temporary privileges and using locum tenens physicians without full credentials verification may clinically and legally endanger patients and healthcare organizations. Attendees will learn strategies for reducing medico-legal risks often associated with temporary and locum tenens privileges. | An FPPE process should not be about kicking people off of the medical staff; it should focus on making the medical staff better and more resilient. If an FPPE process is not accomplishing these goals, it is time to examine it. The speakers will dissect the typical FPPE processes for initial appointment and cause. Attendees will learn how to tweak their processes to obtain useful information to reduce the amount of time a physician spends on FPPE and reduce the need for corrective action. |
### OPPE and FPPE: Doing It Right and Making It Meaningful

**Hugh Greeley; Carol S. Cairns, CPMSM, CPCS; Sally Pelletier, CPMSM, CPCS; and Todd Sagin, MD, JD**

The MSP's role in OPPE and FPPE requires a lot more than pulling a report to send to a physician leader. During this session, audience members will learn how to utilize the MSP's knowledge to contribute to robust OPPE and FPPE programs. Attendees will review and learn from case studies of failed attempts to perform OPPE and FPPE. They will also gain strategies for utilizing members of the quality department, the medical staff services department, and medical staff leaders to improve OPPE and FPPE.

### A Focus on OPPE

**Hugh Greeley and Todd Sagin, MD, JD**

This session will focus on creating an OPPE process that is relevant, useful, and practical. Attendees will learn who should select triggers and measures and how to select triggers that they can use, assess, and track. Attendees will also learn what to do with “zero data” and gain tips for collecting competency data when it is not readily available. A look at the transition from initial FPPE to OPPE to FPPE for cause will also be presented.

### The Broadening Role of the Medical Staff Professional

**Sally Pelletier, CPMSM, CPCS**

As healthcare organizations seek to deliver higher-quality patient care at a lower cost and with greater efficiency, MSPs are playing an increasingly crucial role as part of the healthcare team. Through interactive case studies, this session will focus on the current challenges that result from the implementation of integrated healthcare delivery systems and discuss how those changes are transforming the traditional role of the MSP to include greater responsibilities in delegation, provider enrollment, and onboarding. Attendees will learn what steps to take to approach the medical staff services department of the future.

### Running an Effective Credentials Committee

**Hugh Greeley; Carol S. Cairns, CPMSM, CPCS; Sally Pelletier, CPMSM, CPCS; and Todd Sagin, MD, JD**

During this session, attendees will be exposed to a credentials committee meeting in action. The speakers will act out some of the most common issues that arise during a credentials committee; from orientation (or a lack thereof) to their role as a credentials committee member, to policy and procedure development, to reviewing practitioner applications. Audience members will gain insight on how to avoid common committee mistakes and solutions to correct them.

### How to Avoid Being Named in a Negligent Credentialing Lawsuit

**Hugh Greeley and Todd Sagin, MD, JD**

This session will use the continuing saga of Jane Adele to discuss negligent credentialing issues. Jane submitted a completed and thorough application, full of references, to the medical staff at her new hospital. But what happens when the medical staff professionals and leaders start digging a little deeper and learn about Jane's past disruptive behavior? Audience members will learn what risks are associated with bringing Jane onto the new medical staff and how to avoid a negligent credentialing lawsuit. This session will also focus on providing peer references, whether good or bad, and what it could mean for the physician who provides the reference.

### Improving Performance Through Criteria-Based Privileging

**Sally Pelletier, CPMSM, CPCS**

During this session, the speaker will discuss practical solutions for addressing the challenges, confusion, and roadblocks privileging professionals often face when making the move to a criteria-based core privileging methodology. Attendees will learn what steps are essential to a successful transition and understand the benefits of implementing predefined privileging criteria. The speaker will also discuss how to get appropriate players on board and involved in the transition to criteria-based privileges.
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<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Speakers</th>
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<tbody>
<tr>
<td>10:15 – 10:30 a.m.</td>
<td><strong>Break</strong></td>
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<tr>
<td>10:30 – 11:30 a.m.</td>
<td><strong>Managing Disruptive Behavior: Ensuring Effectiveness While Avoiding Legal Landmines</strong></td>
<td>Hugh Greeley; Carol S. Cairns, CPMSM, CPCS; Sally Pelletier, CPMSM, CPCS; and Todd Sagin, MD, JD</td>
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<td><strong>General Session</strong></td>
<td>This session will address the prevention, detection, and investigation of unprofessional conduct. The speakers will review the options for conducting collegial interventions and discuss the landmines that often arise when an organization takes corrective action. By working with the speakers to examine difficult case scenarios, attendees will gain an understanding of the litigation that can result from efforts to address difficult practitioner behaviors.</td>
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<td>11:30 a.m. – 12:30 p.m.</td>
<td><strong>Rapid Fire, Hard Ball</strong></td>
<td>Hugh Greeley; Carol S. Cairns, CPMSM, CPCS; Sally Pelletier, CPMSM, CPCS; and Todd Sagin, MD, JD</td>
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<td><strong>General Session</strong></td>
<td>In five- to 10-minute segments, our panel of speakers will discuss top industry concerns, including revisions to the National Practitioner Data Bank (NPDB) Guidebook; the current state of Maintenance of Certification requirements; physician self-queries of the NPDB; the unified medical staff; emerging and changing medical staff structures; emergency room privileges; privileging of dietitians, social workers, occupational therapists, and pharmacists; and more!</td>
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<td>12:30 – 1:45 p.m.</td>
<td><strong>Lunch (on your own)</strong></td>
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<td>1:45 – 2:45 p.m.</td>
<td><strong>Professional References: What Do They Really Tell You?</strong></td>
<td>Carol S. Cairns, CPMSM, CPCS</td>
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<td>This session focuses on the art and science of obtaining performance-based professional references. Understand the difference between verifying practice history and obtaining a professional reference. Learn what information should be sought, who can serve as a professional reference, and how and when it’s necessary to follow up. Attendees will gain insight into whether “peer” references are required at reappointment and the explanation of an “evergreen” reference. Attendees will take away a sample professional reference questionnaire to implement within their organization.</td>
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<td>1:45 – 2:45 p.m.</td>
<td><strong>Reengineering FPPE to Make It Effective and Rational</strong> (Repeat session)**</td>
<td>Hugh Greeley and Todd Sagin, MD, JD</td>
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<td>An FPPE process should not be about kicking people off of the medical staff; it should focus on making the medical staff better and more resilient. If an FPPE process is not accomplishing these goals, it is time to examine it. The speakers will dissect the typical FPPE processes for initial appointment and cause. Attendees will learn how to tweak their processes to obtain useful information to reduce the amount of time a physician spends on FPPE and reduce the need for corrective action.</td>
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<td>2:45 – 3:00 p.m.</td>
<td><strong>Break</strong></td>
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<td>3:00 – 4:00 p.m.</td>
<td><strong>Closing Remarks</strong></td>
<td>Hugh Greeley; Carol S. Cairns, CPMSM, CPCS; Sally Pelletier, CPMSM, CPCS; and Todd Sagin, MD, JD</td>
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<td><strong>General Session</strong></td>
<td>At the conclusion of the Symposium, our speakers will gather to discuss the organizational structure of the medical staff and the future of Jane Adele.</td>
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Hugh Greeley began his healthcare career in 1973 while working with the National Blue Cross Association and then with The Joint Commission in Chicago. Since that time Greeley has worked with medical societies, hospital associations, universities, foreign governments, and others to advance the cause of patient care. He is widely regarded as an expert in matters pertaining to medical staff administration, hospital governance, credentialing, performance improvement, accreditation, antitrust, and corporate negligence. During his career, Greeley has visited approximately 1,000 hospitals and has spoken as a faculty member at over 3,500 conferences, institutes, or seminars.

Carol S. Cairns, CPMSM, CPCS, has participated in the development of the medical staff services profession for more than 40 years. In 1996, she founded Plainfield, Illinois–based PRO-CON, a consulting firm specializing in credentialing, privileging, medical staff organization operations, and survey preparation. In 1991, Cairns became clinical faculty for The Joint Commission by collaborating in the development of an educational program on credentialing and privileging medical staff and allied health professionals. From 1996 to 2006, Cairns served the National Committee on Quality Assurance (NCQA) as a surveyor in the certification program for credentials verification organizations. Cairns was invited by the American Osteopathic Association to provide input into the development of the medical staff and allied health professional standards for the 2005 Healthcare Facilities Accreditation Program Manual.

Sally Pelletier, CPMSM, CPCS, is an advisory consultant and the chief credentialing officer for The Greeley Company, Inc., in Danvers, Massachusetts. She brings more than 20 years of credentialing and privileging experience to her work with medical staff leaders and MSPs across the nation. She advises clients in the areas of accreditation, regulatory compliance, credentialing, privileging, onboarding process simplification and redesign, and medical staff services department operations, and provides leadership and development training for medical staff leaders and MSPs.

Todd Sagin, MD, JD, is a physician executive recognized across the nation for his work with hospital boards, medical staffs, and physician organizations. He is the national medical director of Sagin Healthcare Consulting, LLC and HG Healthcare Consultants, LLC, which provide guidance on a wide range of healthcare issues. He served for over half a decade as the vice president and national medical director of The Greeley Company, Inc., in Danvers, Massachusetts.