



# Edge-U-Cate, LLC

## Speakers' Bureau Presents

Educational Choices for Medical Services  
&  
Credentialing Professionals

[www.edge-u-cate.com](http://www.edge-u-cate.com)

2023



Edge-U-Cate speakers are available to present all the topics included below for your organization's educational program needs or **we can build a customized program** to meet your members' education needs.

## Featured Programs

These programs can be presented as "Bonus Days" before or after your State Conferences or at other times throughout the year.

***-CPCS® and CPMSM® Certification Focused Study Program for NAMSS® Certification (1 or 1.5 day program – virtual or onsite)***

***-Mini "Credentialing Basics" program (1 or 1.5 day program – virtual or onsite)***

## Current Popular Topics

Speakers listed are Primary Faculty for most topics, substitutions may be made

PROGRAM TITLE	PROGRAM SUMMARY
Credentialing and Provider Enrollment: Two Sides of the Same Coin – Are you Heads or Tails?  (90 minutes)  Co-Presenters: Chris Giles Mathieu Gaulin	Are you hearing the word "credentialing" being used differently by people these days? There are many functions coming under the umbrella of credentialing but maybe we need to look at the similarities and differences of the functions. This program will review the functions of traditional credentialing and provider enrollment, compare and contrast the tasks and suggest ways that working together may not only enhance the two processes, but could offer some new job opportunities.
Expand Your Horizon – Who Else Credentials and Privileges Besides Hospitals? (60 minutes)  Presenter: Cris Mobley	Credentialing/Privileging has become an expansive industry as we know. Opportunities for MSPs have greatly expanded, not only in multiple types of hospitals and non-hospitals, but the virtual world has opened up opportunities as well. This session will describe additional environments such as FQHCs/look alikes, community health centers, ASCs, tribal clinics, and student health centers to name a few as well as who accredits them; e.g., HRSA, IHS, AAAHC, and more.
Move To A Three Year Reappointment Cycle: To Change Or Not To Change, That Is The Question??  (60 minutes)  Co-Presenters: Todd Sagin, MD, JD Janet Wilson, BS, FMSP, CPMSM, CPCS	The Joint Commission recently revised their medical staff standards to allow for a three year schedule While many in the industry review this change as favorable, there are a multitude of decisions that must be made before this change should occur. In this program, we will discuss the pros and cons of transitioning to a reappointment period of three years, and discuss the regulatory, accreditation and governance document factors that will need to be evaluated and considered.

PROGRAM TITLE	PROGRAM SUMMARY
<p>Getting Your Reappointment Ducks in a Row (60 minutes)</p> <p>Presenter: Cris Giles or Cris Mobley</p>	<p>Thinking of changing your reappointment cycle to 3 years based on new TJC/ACHC standard updates? Not too fast. There are factors to be discussed, weighed, and a plan to follow for reaching the decision to implement. We'll discuss the pros and cons that should be considered and with who, other regs to be considered and making sure all the "ducks" are aligned before moving forward.</p>
<p>Are you Up to Date?? Accreditation Standards Updates for 2023 (60 minutes)</p> <p>Presenter: Janet Wilson</p>	<p>There have been some updates to Accreditations Standards that affect our industry. During this session we will highlight and discuss the recent updates and compliance requirements.</p>
<p>Mitigating Risk for Patients and Health Centers/Hospitals through Quality Credentialing (90 minutes)</p> <p>Presenter: Cris Mobley</p>	<p>Credentialing/privileging is not just an exercise in paperwork! A well-organized process following accreditation standards and state/national regulations is essential to ensuring health centers are recruiting well qualified individuals who will provide safe and quality patient safety care to your patient population. This session will provide key documents to be collected and evaluated, identifying "red flags" and tips to avoid any unnecessary risk when adding and re-credentialing practitioners to your staff.</p>
<p>Speak Up – It's Your Job – identifying and addressing Red Flags (90 minutes)</p> <p>Presenter: Cris Mobley</p>	<p>It's one thing to collect data related to an application or reapplication. It's another to be able to identify some of the "flags" raised when assessing that information once received. The more you experience you have processing files, the more you develop a "sixth sense" to know there's something not quite right. This session will identify common and uncommon red flags that should be addressed and steps to take depending upon the nature of the information received.</p>
<p>How are you doing? Is it Time for an MSP Happy Hour?? (60 minutes)</p> <p>Presenter: Janet Wilson</p>	<p>This has been an exhausting year in our industry. Our workload has increased and we have had to learn new ways to do our jobs and support our leaders. Our stress is at levels some of you may have never experienced. Question.....how are you managing your stress? Have you found ways to balance your life in this new environment? Let's discuss and share ideas on how to get through these times together and celebrate our achievements.</p>
<p>Ignore, Manage, Report?? How do you address physicians who resign with red flags? (60 minutes)</p> <p>Presenter: Janet Wilson</p>	<p>Do you have physicians who resign with red flags in their file you are tracking/trending? Do you have a policy that requires you review/address red flags before allowing the physician to resign? Is there language in policy or bylaws that will not allow a practitioner to reapply for membership/privileges if they resigned with outstanding red flags in their file? Lets discuss best practices to consider.</p>

PROGRAM TITLE	PROGRAM SUMMARY
<p>Aspire Higher – Stepping up to Leadership (60 minutes)</p> <p>Presenter: Cris Mobley</p>	<p>Want to be a leader? Intimidated by leadership? We'll explore leadership positions that are within reach and how to get there. What are the fears associated with leadership roles? You too can learn to speak in front of others. We'll discuss the plan for leadership roles internally and externally (e.g., state associations)</p>
<p>VERIFY AND COMPLY: Credentialing across the Spectrum of Hospitals, Surgery Centers and Managed Care (3 hours)</p> <p>Presenter: Janet Wilson</p>	<p>Janet is the co-author of HCPro's Verify &amp; Comply: Credentialing, Medical Staff, and Ambulatory Care Standards. In this program she will share a comprehensive comparative review of all regulatory and accreditation standards. This program also helps support those MSPs currently seeking NAMSS certification and supports professional development for those experienced in the industry seeking updates to their resources and knowledge base.</p>
<p>MSPs and Stress – what do they have in common? (75 minutes)</p> <p>Presenter: Cris Mobley</p>	<p>Stress – it comes with the job! It can lead to burnout which is worse. Don't go there, please. We'll define causes of stress in the workplace, define the symptoms of stress and burnout, and some innovative ways to avoid or at least lessen the load. Deep breaths and a little chair yoga.</p>
<p>Accreditation Standards and Industry Standards – Are they the same? NOT!!</p> <p>Presenter: Cris Mobley</p>	<p>Many people believe that because policies dictate how to process an application or reapplication, it is required by the accreditor and/or CMS. Not necessarily true. Much of what MSPs verify and/or collect during this process is due to "industry" standards because it makes sense. There is often confusion as to what's required and what is done to supplement the requirements. In this session, we will differentiate between the two, addressing "myths" about the origin of the processes we follow. You may be surprised!</p>
<p>Find Your Voice – Crucial Credentialing Discussions (60 minutes)</p> <p>Presenter: Janet Wilson</p>	<p>In our role as medical services professionals, we are sometimes faced with the responsibility of initiating a crucial conversation with hospital leaders and medical staff leaders regarding problematic findings identified during the credentialing or peer review process. In this program we will share scenarios on how to prepare for crucial conversations, how to relay important information necessary to support an educated, not emotional decision by the hospital or medical staff leader and also how to be persuasive and provide influence, if necessary, to succeed in conversations with leaders.</p>
<p>Working Remotely -Or Not – Where are you Post-COVID? (90 minutes with audience participation)</p> <p>Presenter: Cris Mobley</p>	<p>COVID has changed our lives – forever, including for many how and where we now work. More than half of our industry no longer works full time in an external office (away from home). Now that things have settled down more or less, we'll discuss how to embrace moving forward from the "old" normal and address tips and tricks.</p>

PROGRAM TITLE	PROGRAM SUMMARY
<p>Virtual Meetings &amp; Minutes – The Same or Different? Presenter: Chris Giles</p>	<p>Identify similarities &amp; differences between virtual and live meetings. Explore the key communication techniques and how to use them virtually.</p> <p>Explore the necessary tools to assist in recording useful minutes Suggestions for success in today’s world of virtual meetings and Helpful vocabulary to add to minutes</p>
<p>Privileging and Assessment of Competency in Ambulatory Settings (60 minutes) Presenters: Cris Mobley or Chris Giles</p>	<p>Many healthcare systems include ambulatory settings. If those settings are under your corporate umbrella – you need to ensure that privileging and assessment of competency is taking place and is meaningful</p>
<p>Maintaining Relevant Privilege Documents – What does it take? (60 minutes) Presenter: Cris Mobley or Chris Giles</p>	<p>New technology breeds new privileges resulting in revisions to maintain current lists/criteria. What should good privilege forms include and not include and what’s the MSSP’s role in review/revision.</p>
<p>Risk Management Approach to Credentialing and Privileging (60 minutes)  Presenter: Chris Giles</p>	<p>How to avoid legal and risk problems by establishing a risk assessment approach to the credentialing and privileging processes.</p>
<p>HR and Medical Staff Peer Review – Collaboration is Key to Assuring Patient Safety!! (60 minutes)  Co Presenters: Todd Sagin, MD, JD Janet Wilson, BS, FMSP, CPMSM, CPCS</p>	<p>The AMA recently reported, approximately 51% of physicians are employed. Unfortunately, an increasing number of physicians who are terminated by the employer (HR) for behavior or clinical quality problems are allowed to move freely to another practice with no concurrent or subsequent medical staff peer review action. We will discuss ideas, options and regulatory opportunities for a collaborative approach to peer review for employed physicians.</p>
<p>Navigating Physician Aging and Physician Re-Entry – Tricky but Doable  Presenter: Cris Mobley</p>	<p>There are fewer and older physicians practicing today. Some have retired but coming back. An interesting dilemma in these times. Discussion will include potential associated risks with both, address policies that need to be in place, share valuable resources to assist organizations in assessing competency levels and review some actual case studies.</p>

PROGRAM TITLE	PROGRAM SUMMARY
<p>Credentialing Committee Vetting of State Medical Board Information: Applying the Right Diligence (60 minutes)</p> <p>Co Presenters: Todd Sagin, MD, JD Janet Wilson, BS, FMSP, CPMSM, CPCS</p>	<p>This session will highlight the importance and value of querying information from a state medical board in a manner which yields necessary information. In many cases it may not be sufficient to simply confirm whether an applicant has an active license. Attendees will learn that state medical boards are variable in the speed with which they post actions against licensees, the completeness of the information posted, the length of time in which they keep information posted on their websites, and the manner in which they alert those querying that there is additional information in board files.</p>
<p>Avoiding Negligent Credentialing – Tricks of the Trade (90 minutes) Presenter: Cris Mobley</p>	<p>No one wants to read about their organization in the headlines for a negligent credentialing lawsuit. So, how do you avoid credentialing risk in your organization? Understand why a rushed appointment can come back and bite you, differentiate between well written and vague privileging criteria, and other practical tips plus discussion of actual case studies from an expert witness.</p>
<p>Fortifying the Relationship: Provider Enrollment and Credentialing (60 minutes) Presenter: Chris Giles</p>	<p>Discussion will include enrollment and credentialing and lack of relationship and explore the affect of automation on both processes. We will identify the shared data items that support both and look at the advantage of streamlining and data sharing.</p>
<p>On-Boarding – So Many Ways, So Little Time (60 minutes) Presenter: Cris Mobley</p>	<p>How many avenues do practitioners have to enter your system – locum tenens, temporary privileges, telemedicine practitioners, community based, contract, employed, etc. What is common thread and what outliers do you need to define. Also, what role does recruitment play and where do you fit in?</p>
<p>Strategies for Developing an Effective FPPE and OPPE process for your Medical Staff (60 minutes) Presenter: Janet Wilson</p>	<p>An effective FPPE and OPPE process is necessary for organizations to confirm “current competence” of privileged practitioners. We will share tips and tools for development of effective and compliant programs.</p>
<p>Engaging New Physicians Through Effective Orientation (60 minutes)  Presenter: Janet Wilson</p>	<p>TJC and other accrediting bodies require organizations orient their new practitioners to bylaws, policies and procedures and other governance processes. This course shares how to establish an effective orientation that supports engagement and is an efficient and comprehensive resource for the organization</p>
<p>Resolving Credentialing Concerns for Re-entry Practitioners (60 minutes)  Presenters: Beth Korinek – CPEP Cris Mobley &amp; Chris Giles</p>	<p>This session will identify the unique challenges presented by clinicians who have a gap in patient care or procedures. It will include an overview of national re-entry trends, guidance on re-entry policies, review of approaches to facilitate an effective and safe transition onto the clinical staff and presentation of case studies</p>

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<p>FPPE and OPPE – Still Crazy after all these Years (90 minutes) Presenter: Cris Mobley</p>	<p>Why is the industry still struggling? We'll discuss the stumbling blocks still out there like process, low volume, data gathering, support and more. We'll discuss the use of PI findings to market the office/department, describe the link between performance and evidence based privileging with FPPE/PPE/OPPE, and identify challenges and opportunities for a "best practice" compliance process.</p> <p>NOTE: This can also be a 60 minute program on just FPPE</p>
<p>Performance Improvement for the Credentialing Process  Presenter: Chris Giles</p>	<p>Identify key performance improvement methodologies and explore ways to apply PI methodology to the credentialing process.</p>
<p>We've Come a Long Way, Baby! (60 minutes) Presenter: Cris Mobley</p>	<p>Looking back at where we came from, where we are, and where we're going. This profession is ever changing, so how do we not only keep up but also get to where we want to go? (an insight from someone in this profession for more than 40 years)</p>
<p>Diagnosing from a Distance – Telehealth Presenter: Cris Mobley</p>	<p>During and post-COVID, telehealth has risen to the forefront for provision of care. We'll discuss the standards' requirements, options for provision of care and how to decide on the best option to utilize. And, we'll look at a case study for how a small facility utilized Dr. Robot to provide nighttime hospitalist services.</p>
<p>Clinical Performance Concerns: Recognize Warning Signs &amp; Respond Effectively (60 minutes) Presenter: Beth Korinek -CPEP</p>	<p>Medical Staff leaders may struggle with knowing when to intervene and how to do so effectively. In this session, attendees will learn how to recognize patterns of questionable performance &amp; respond using effective strategies and resources for skill remediation &amp; performance improvement.</p>
<p>How to Assure you have an Effective Medical Staff Confidentiality Policy and Process (60 minutes)  Presenter: Janet Wilson</p>	<p>This program will help attendees understand the importance and need for confidentiality in the medical staff and credentialing industry. We will identify key components of a comprehensive confidentiality policy. We will also demonstrate how to establish internal guidelines and processes based on an effective and accountable confidentiality policy</p>
<p>Collaborative Approach to Developing and Maintaining Delineation of Privileges in your Organization (60 or 90 minute program)  Presenter: Janet Wilson</p>	<p>This course will help you develop a collaborative, ongoing, systematic approach to updating/maintaining privilege forms for your organization. We will also share key parties' accountability and responsibilities in this important process</p>



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Can You Take a Vacation? (60 minutes) Presenter: Janet Wilson	Since everyone needs to take vacations, or just needs a mental or physical break, you can proactively prepare for these breaks. In this course we will share tips on how to successfully delegate responsibilities in your absence and how to establish succession planning.
Transitioning to a Paperless Environment (60 minutes)  Presenter: Janet Wilson	Learn how to get rid of the paper and transition to a paperless or paper-light office. We will review how to strategically plan for and successfully transition to your new environment.
Is a System CVO the Right Answer for your Organization?? (60 minutes)  Presenter: Janet Wilson	How to evaluate your hospital's credentialing processes to determine if a CVO approach would be right for your organization. If a CVO is the answer, how to establish an effective step by step process for a successful transition.
Mini-Credentialing Basics (1-1.5 days) Presenter: Cris Mobley and/or Chris Giles	This is a condensed version of Edge-U-Cate's full 32 hour course offered nationally but can be added before or after a state's conference or other time. It will cover what is credentialing, why we credential, who credentials, accreditation bodies, confidentiality, and the principles of initial appointment, reappointment, privileging and performance evaluation, and include how and where to primary source verify the information needed to make recommendations to the Board. An excellent primer for beginners or good review for others.
<u>EDGE-U-CATE CPCS®/CPMSM® Certification Focused Study Program</u>  1 day CPCS® only program (onsite or virtual)  1.5 day CPCS/CPMSM® program (onsite or virtual)  1 day CPCS/CPMSM® (onsite or virtual) with additional 3 hours prerecorded CPMSM material provided)  Presenter: Janet Wilson  All study resources are provided along with a guide for studying and study questions.	Edge-U-Cate offers a very comprehensive <u>onsite or virtual CPCS/CPMSM® Certification Focused Study Program</u> designed to help MSPs study for the NAMSS CPCS/CPMSM® certification exams. We have taught this very successful program for 16 years and have received many testimonials of success from MSPs in the industry.  The courses we offer are formatted for a 1 day or 1.5 day program and includes a very focused study environment for those studying for either the CPCS® or CPMSM® NAMSS certification exam. All study resources are provided along with sample study questions and tools and tips for studying for the exam plus one-on-one time with the instructor during and after the study program.