

<b>Purpose:</b>	To support Medical Staff Departments to provide timely, in-depth reviews for Provisional medical staff that promote professional development while ensuring that new members have the clinical and professional skills needed to deliver safe and effective patient care
<b>Rules and Bylaws:</b>	This process is consistent with the Medical Staff Bylaws and Rules, specifically: <ul style="list-style-type: none"><li>• <a href="#">Medical Staff Bylaws</a>: Articles 4.4, 4.5 &amp; 6.1, and</li><li>• <a href="#">Medical Staff Rules</a>: Section 1.5.17</li></ul>
<b>Outcomes:</b>	<ul style="list-style-type: none"><li>• In-depth practitioner reviews are systematically provided in accordance with the Medical Staff Rules and Bylaws</li><li>• Reviews are completed in a timely manner with results available for consideration within Provisional Medical Staff category changes</li><li>• Reviews are comprehensive, collaborative, provide objective data and feedback, and are structured to support professional growth and development</li><li>• Review findings are clearly documented and support departmental recommendations regarding a Provisional member's transition to Active status</li></ul>

## 1.0 Requirements

Island Health's Medical Staff Rules and Bylaws provide a framework for appointments to the medical staff, including the conduct of reviews that are required before Provisional to Active category changes may occur. Broadly speaking, the Rules and Bylaws require that:

- Applicants to the Active category of privileging are initially appointed as Provisional
- After six months, Provisional members may be considered for appointment to the Active category once an in-depth practitioner review has been completed
- Following the in-depth practitioner review, Provisional members may be considered for the Active category upon recommendation of the Department Head
- Continuous membership in the Provisional category cannot exceed 24-months

The in-depth review is a mandatory component of the application and evaluation process that precedes Board consideration of an appointment to the Active category of medical staff in Island Health. Provisional members are considered to have applied for Active status by virtue of having applied for and accepted a Provisional appointment. The Provisional member must receive an in-depth review unless they explicitly indicate that they wish to withdraw from the process.

While it is left to the Department leadership's discretion when to start the review process after the provisional member becomes eligible, it is encouraged to start reviews no later than 18 months to allow for sufficient time to undertake a fulsome and meaningful process within the 24-month deadline. Beginning the review process as early in the Provisional period as possible is particularly important in cases where there may be concerns regarding a Provisional member's performance. Early reviews allow for more time to document and share the concerns with the member and provide them with an opportunity for meaningful improvement.

## 2.0 Roles and Responsibilities

Health Authority Medical Advisory Committee (HAMAC)	<ul style="list-style-type: none"> <li>Addresses issues and challenges unable to be resolved by Medical Staff Departments and the Medical Planning and Credentials Committee (MPCC)</li> <li>Supports escalation processes upon request by MPCC</li> </ul>
Medical Planning and Credentials Committee (MPCC)	<ul style="list-style-type: none"> <li>Oversees review processes and supports Medical Staff Departments to produce consistent, high-quality reviews undertaken in accordance with the principles of procedural fairness</li> <li>Works with Medical Staff Departments to establish department-specific review guidelines and support timely completion</li> <li>Reports any instances where a Division Head recommendation is NOT to move to Active status</li> <li>Requests HAMAC consideration of any unresolvable concerns regarding departmental reviews</li> </ul>
Credentialing Office	<ul style="list-style-type: none"> <li>Provides administrative support, Provisional member status and other reports to facilitate various process steps</li> </ul>
Credentialing & Privileging (C & P) Medical Director	<ul style="list-style-type: none"> <li>Ensures overall quality of the review process</li> <li>Assists Division and Department Heads when complications arise in the review process</li> <li>Final review sign-off prior on any category changes recommended to MPCC</li> </ul>
Department Head	<ul style="list-style-type: none"> <li>Establishes department-specific review standards and best practices</li> <li>Provides additional resources and support for complex reviews for Division Heads</li> <li>Ensures departmental review processes are structured to achieve high quality, consistent, and fair outcomes</li> <li>Escalates issues and challenges to the Credentialing &amp; Privileging Medical Director and MPCC</li> </ul>
Division Head (Reviewer)	<ul style="list-style-type: none"> <li>Determines the structure and content of the review in accordance with established standards</li> <li>Gathers input, conducts a review meeting with the Provisional Member, and completes a written appraisal</li> <li>Submits required documents and provides any additional input or information requested by MPCC or HAMAC</li> <li>Reviews are generally conducted by Division Heads, but may be conducted by Department Heads, Chiefs of Staff, or an external party (at the direction of HAMAC)</li> </ul>
Provisional Member	<ul style="list-style-type: none"> <li>Completes a self-assessment, sends to Division Head and Credentialing Office</li> <li>Participates in additional activities at the request of their Division Head and signs off on the completed review</li> </ul>

## 3.0 Forms & Reports

### Forms:

- Practitioner Self-Assessment Form:** to be completed by the Provisional member as input to the review
- Team Member Feedback Form:** to be completed by selected members of the team. Optional, but recommended
- Practitioner Performance Appraisal:** to be completed by the Division Head. Provides a standardized report and record of review outcomes

### Reporting:

- Monthly Department Reports:** a list of all provisional members, including their date of original appointment will be sent to the Department Head

Maintained by: Credentialing & Privileging

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## 4.0 Procedure

The process in principle, up to the approval pathway, is in accordance with our Medical Staff Bylaws and Rules. Departments, however, may vary in when and how they undertake each of these activities, such as:

- Delegating parts of the review process (prior to Division Head sign-off)
- Initiating and accepting self-assessment on a variable timeline
- Requiring Team member feedback, and possibly, identifying particular members of the team to provide feedback
- Establishing a department-specific process to collect team member feedback
- Determining inputs used for the review process (e.g., patient satisfaction data, chart reviews, observations of procedural and assessment skills or communication skills with colleagues and other members of the staff)

### **Step 1 – Eligibility Notification**

- The Credentialing Office sends an email to the Provisional member and Division Head (the default reviewer) notifying that the Provisional member is eligible for the review, and the deadline for the completed review
- If applicable, the Division Head identifies any additional inputs beyond the departmental standard that will be considered within the review

### **Step 2 – Compiles Inputs for the Practitioner Performance Appraisal (PPA) Form**

- The Provisional Member completes the *Practitioner Self-Assessment Form* and sends it by email to the Division Head and the Credentialing Office
- The Division Head collects and evaluates team member feedback, as per the above
- The Division Head collects all inputs to the review and completes a draft of the *PPA Form*

### **Step 3 – Division Head Meets with the Provisional Member to share the outcome of the PPA**

- The Division Head reviews the outcome of the PPA with the Provisional member

### **Step 3A – If the review outcome is a recommendation to move to Active Status:**

- The Credentialing Office seeks endorsement of the Division Head's recommendation from the Department Head followed by the Credentialing and Privileging (C & P) Medical Director
- The Credentialing Office sends the Provisional member the notice of recommendation to be transitioned to Active status
- MPCC reviews and makes a recommendation to HAMAC who reviews and makes a recommendation to the Board for their consideration and approval

### **Step 3B – If the review process identifies performance improvement opportunities and/or results in a negative recommendation:**

- The Division Head notifies and consults the Department Head for assistance
- The Division Head ensures that the medical staff member understands the identified gaps and opportunities for improvement including clear deliverables with reasonable timelines for completion and re-evaluation
- The Division Head schedules a follow-up meeting to review if they were successful in addressing the previously identified performance improvement opportunities
- If the concerns have been resolved, and the medical staff member has met the standards for the Department, the Division Head will proceed according to Active status as per above in section 3A
- If the concerns have not been successfully addressed, the Division Head and Department Head will notify and consult the C & P Medical Director
- Department Head and C & P Medical Director will take the non-routine review to MPCC for in camera deliberation, if applicable

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## 5.0 Provisional Membership Extension or New Application

- If the Provisional member is on a Board approved Leave of Absence, the 24-month limitation on their Provisional appointment may be extended in accordance with the duration of their leave
- In rare circumstances, an option may be provided for the Provisional member to apply for a new Provisional appointment, as recommended by MPCC and further endorsed by HAMAC

## 6.0 Notifications and Reminders

- The Provisional member and Departmental Leaders are provided an optimal number of notifications and reminders at an appropriate cadence to inform and encourage completion of the review process
- The Division and Department Heads are provided the *Monthly Department Reports* to access the Provisional member's status

Month	Purpose	Sender	Recipient	Method	Message
6	Eligibility Alert	Credentialing Office	Division Head	Monthly Depart. Report	<ul style="list-style-type: none"> <li>• The Provisional member and Division Head are notified of review eligibility and the deadline for completion is provided</li> </ul>
			Provisional Member Division Head	Direct Emails	
9	Reminder 1	Credentialing Office	Division Head	Monthly Depart. Report	<ul style="list-style-type: none"> <li>• The Division Head is sent a report</li> </ul>
			Provisional Member	Direct Email	<ul style="list-style-type: none"> <li>• The Provisional member is sent a reminder to complete the <i>Practitioner Self-Assessment Form</i></li> </ul>
12	Reminder 2	Credentialing Office	Division Head	Monthly Depart. Report	<ul style="list-style-type: none"> <li>• The Division Head is sent a report</li> </ul>
			Provisional Member	Direct Email	<ul style="list-style-type: none"> <li>• The Provisional member is sent a reminder to complete the <i>Practitioner Self-Assessment Form</i></li> </ul>
15	Escalation Alert	Credentialing Office	Division Head	Direct Email	<ul style="list-style-type: none"> <li>• The Division Head is alerted that the next communication will include the Department Head and Provisional member</li> </ul>
			Provisional Member	Direct Email	<ul style="list-style-type: none"> <li>• The Provisional member is sent a reminder to complete the <i>Practitioner Self-Assessment Form</i></li> </ul>

## 7.0 Escalation Process

- When MPCC approves the transition of a Provisional member to Active status by 24-months the prescribed timeline will be considered to have been met
- An escalation process has been developed to ensure that adequate efforts have been undertaken to support timely completion. This review process will include involving the Provisional members, themselves, beginning at 18-months, as well as increasingly higher levels of leadership in the requests to complete the review
- This escalation process is intended to provide a framework, however upon receipt of communication from the medical leader regarding the status of the review with the Credentialing Office, escalation steps will be modified accordingly
- The escalation process is intended to prevent delays in Routine Provisional to Active reviews, but does not apply to in-depth reviews that have been deemed Non-Routine that may require additional time to resolve

## 7.0 Escalation Process Continued

Month	Purpose	Sender	Recipient	Method	Message
18	Escalation 1	Credentialing Office	Division Head CC: Department Head Provisional Member	Direct Email	<ul style="list-style-type: none"> <li>The Provisional member is made aware of the time-sensitive review, and encouraged to follow-up with their Division Head or Department Head to actively participate in the efforts to complete this in a timely manner</li> <li>The Department Head is now involved</li> <li>The C &amp; P Medical Director will be alerted at the next step</li> </ul>
20	Escalation 2	Credentialing Office	Division Head Department Head CC: C & P Medical Director	Direct Email	<ul style="list-style-type: none"> <li>The Division Head is offered another opportunity to complete the time-sensitive review</li> <li>The Division and Department Heads are alerted that the next step will be direct communication from the C &amp; P Medical Director</li> </ul>
21	Escalation 3	C&P Medical Director	Division Head Provisional Member CC: Department Head	Direct Email	<ul style="list-style-type: none"> <li>The Provisional member, Division and Department Heads are made aware that the next step will be to advise MPCC of the outstanding review in hopes that the review will be completed in a timely manner</li> </ul>
22	Escalation 4	C & P Medical Director	MPCC	Presentation to MPCC	<ul style="list-style-type: none"> <li>MPCC is requested by the C &amp; P Medical Director to endorse a standardized communication to the Departmental Leaders and Provisional member</li> </ul>
		MPCC	Division Head Department Head Provisional Member	Direct Email	<ul style="list-style-type: none"> <li>The Departmental Leaders and Provisional member are alerted by the MPCC that there are two months remaining, prior to the end of the maximum of 24-months for a Provisional medical staff appointment</li> <li>If the Departmental Leaders do not submit a completed review and recommendation by 24-months, the next step will be to involve the EMD of Governance as delegate of the VP of Medicine to support the next steps</li> </ul>
24	Escalation 5	MPCC	EMD Governance	Direct Email	<ul style="list-style-type: none"> <li>The EMD is notified by MPCC of the failure to complete a review and submit a recommendation regarding a medical staff member who has reached 24-months in their Provisional status</li> <li>The EMD's direction is sought from MPCC to proceed with consideration for recommendation to terminate the application for an Active staff status</li> <li>The steps of this process may vary depending upon the factors involved</li> </ul>
25	Escalation 6	MPCC	HAMAC	Report	<ul style="list-style-type: none"> <li>HAMAC is presented the outcome of the MPCC deliberation in a recommendation for HAMAC's consideration and endorsement for approval for the Board of Directors</li> </ul>