

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

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 two years.

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 and must receive an in depth review unless they explicitly indicate that they wish to withdraw from the process.

Departments are encouraged to begin the review process as early in the Provisional period as possible, particularly in cases where there may be concerns regarding a Provisional member’s performance. Early reviews allow 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"> • Addresses issues and challenges unable to be resolved by Medical Staff Departments and the Medical Planning and Credentials Committee (MPCC) • Support escalation processes upon request by MPCC
Medical Planning and Credentials Committee	<ul style="list-style-type: none"> • Oversees review processes and supports Medical Staff Departments to produce consistent, high quality reviews undertaken in accordance with the principles of procedural fairness • Works with Medical Staff Departments to establish Department-specific review guidelines and support timely completion • Reports any instances where a Reviewer recommendation is NOT to move to Active status

Maintained by: Medical Planning & Credentialing Committee

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	<ul style="list-style-type: none"> • Requests HAMAC consideration of any unresolvable concerns regarding departmental reviews
Credentialing Office	<ul style="list-style-type: none"> • Provides administrative support, provisional member status and other reports to facilitate various process steps
Medical Director - Credentialing & Privileging	<ul style="list-style-type: none"> • Ensures overall quality of the review process • Assists Reviewer and Department Heads when complications arise in the review process • Final review sign-off prior on any category changes recommended to MPCC
Medical Staff Department	<ul style="list-style-type: none"> • Establishes department-specific review standards and best practices • Provides training, troubleshooting, and other support for Reviewers • Ensures departmental review processes are structured to achieve high quality, consistent, and fair outcomes • Escalates issues and challenges to the Medical Director or MPCC
Reviewer	<ul style="list-style-type: none"> • Determines the structure and content of the review in accordance with established standards • Gathers input, conducts a review meeting with the Provisional Member, and completes a written appraisal • Submits required documents and provides any additional input or information requested by MPCC or HAMAC • Reviews are generally conducted by Division Heads, but may be conducted by Department Heads, Division Heads, Chiefs of Staff, or an external party (at the direction of HAMAC)
Provisional Member	<ul style="list-style-type: none"> • Completes a self assessment • Participates in additional activities at the request of their reviewer and signs off on the completed review

3.0 Resources and Reporting

- **Online Resources:**
 - A comprehensive set of resources will be maintained by the Credentialing Office on the MPCC Sharepoint and the Medical and Academic Affairs website, including all forms and process descriptions
- **Forms:**
 - *Practitioner Self-Assessment Form*: to be completed by the Provisional member as input to the review
 - *Team Member Feedback Form*: optional, but recommended
 - *Practitioner Performance Appraisal*: to be completed by the Reviewer. Provides a standardized report and record of review outcomes
- **Committee Manager:**
 - The electronic system that facilitates approvals and documentation flow for reviews and other Credentialing and Privileging processes
- **Standardized Email and Letter Templates:**
 - *Review Initiation Email Template*: sent by the Credentialing Office at the direction of the Reviewer to commence the review process
 - *Notice of Recommendation*: communicates the result of the review to the Provisional member while awaiting final approval by the Board
 - *Provisional Escalation First Notice*: advises Department and Division Heads that a Provisional member's status is nearing expiration
 - *Provisional Final Notice*: advises Department and Division Heads that a Provisional member's status is at the point of expiration

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- **Reporting:**

- *Monthly Department Reports:* a list of all provisional members, including their date of original appointment will be sent to the Department Head on a monthly basis.
- *Credentials Summary Report:* contains a summary of Medical Staff appointments completed within the preceding period

4.0 Notifications and Reminders

- *Provisional Member Notifications:* Notification will be sent by the Credentialing Office to Provisional Members at 6 and 18 months following their initial appointment, copying the Division Head. These will include:
 - General guidance on the review process
 - Links to relevant web-based resources and instructions
 - Notification of Provisional status expiry at 24 months
 - Explanation of the requirement to have a review to become an Active member of the Medical Staff
- *Division Head Reminders:* On a monthly basis, the Credentialing Office will send a report to each Division Head overseeing at least one Medical Staff member who has been on Provisional status for six months or more. The report will include:
 - The name of each Provisional member and the date of their original appointment
 - The Provisional member's e-mail address
 - Any other relevant information held by the Credentialing Office, including the Provisional member's Leave of Absence status and the current stage of the review as recorded in the Cactus system

5.0 Procedure

Step 1 - Confirm Reviewer

- By default, the Reviewer is the Division Head
- No action is needed unless another eligible party is designated to be the Reviewer, in which case the Credentialing Office should be notified

Step 2 – Initiate Review and Complete Self Assessment

- The Reviewer initiates the review by directing the Credentialing Office to send the *Review Initiation Email* to the Provisional Member copying the Division Head
- If applicable, the Reviewer identifies any additional inputs beyond the departmental standard that will be considered within the review and notifies the Provisional member
- The Provisional Member completes the *Practitioner Self Assessment Form* and sends it by email to the Reviewer and the Credentialing Office

Step 3 – Compile Inputs and Complete the Written Review

- The Reviewer collects all inputs to the review and completes a draft of the *Practitioner Performance Appraisal*
- The Reviewer arranges time with the Provisional member to present and discuss the review contents and sends the written draft in advance of this meeting

Step 4 – Hold the Review Meeting and Incorporate Feedback

- At the arranged time, the Reviewer meets with the Provisional member to discuss the review
- The Reviewer considers feedback from the Provisional member, adjusts the review draft if appropriate, and obtains written acknowledgement of review completion from the Provisional member
- The Reviewer sends the *Practitioner Self-Assessment Form*, the *Practitioner Performance Appraisal*, and any additional documents that should be retained to the Credentialing Office by email

Step 5 – Complete the Review

If the review outcome is positive:

- The Credentialing Office uploads all review documents to Committee Manager and refers them to the Department Head and the Medical Director for approval
- The Department Head or Medical Director may follow up with the Reviewer if any further input, clarification, or adjustments are required
- The Department Head and Medical Director enter their endorsement of the Reviewer's recommendation in Committee Manager
- The Credentialing Office notifies the Provisional member of the outcome in a *Notice of Recommendation* while awaiting final Board approval

In cases where the review outcome may be reasonably expected to result in a negative recommendation from the Department Head regarding an individual's transition to the Active staff, the Reviewer should consult with the Department Head and MPCC to determine next steps.

Step 6 – Endorse Recommendation and Send for Board Approval

- The Credentialing Office includes the recommendation in the *Credentials Summary Report*
- MPCC reviews and endorses the recommendation seeking further information and input as required
- The MPCC-endorsed *Credentials Summary Report* is forwarded to HAMAC for consideration at its next monthly meeting
- HAMAC reviews and makes recommendation to the Board

6.0 Provisional Membership Extension or Renewal

- If the Provisional member is on a Board approved Leave of Absence, the 24 month limitation on their Provisional appointment may be extended commensurate with the duration of the leave
- If a recommendation by the Department Head to transition the Provisional member to Active status cannot be forthcoming within the prescribed 24 month period, the member has the option to apply for a subsequent reappointment to the Provisional category

7.0 Escalation Process

- To ensure that Provisional members and Reviewers complete the required process steps within the allotted time, an escalation process has been developed

- Notifications arising through this escalation process will be sent at the time *Monthly Department Reports* are generated
- The escalation process will be modified to reflect any extensions granted in accordance with Section 5.0 above
- Escalation steps may be modified at the discretion of the Vice President (VP) of Medicine
- If HAMAC approves the transition of a Provisional member to Active status within 24 months of their initial appointment the prescribed timeline will be considered to have been met

Time Passed Since Provisional Appointment	Action
20 Months	<ul style="list-style-type: none"> • <i>Provisional Escalation First Notice</i> sent to Division Head and Department Head • <i>Provisional Process Alert #1</i> sent to Provisional member
21 Months	<ul style="list-style-type: none"> • MPCC reviews the list of Provisional members past 21 months and endorses a communication to each Reviewer requesting that they complete their reviews • MPCC Chair sends each request to the Reviewer in writing, copying the Department Head, the VP of Medicine, and HAMAC Chair
22 Months	<ul style="list-style-type: none"> • If, at the time of the MPCC monthly meeting, a Medical Staff member has remained on Provisional status for more than 22 months, MPCC will report the incident to HAMAC • MPCC Chair sends <i>Provisional Final Notice</i> to the Department Head and Division Head • The VP of Medicine and HAMAC Chair are advised and may direct further remedial action at their discretion
24 Months	<ul style="list-style-type: none"> • Provisional member's privileges expire • Notification is sent to the former Provisional member to advise them of the change