

# Credentials File Audit Leads to Multiple Discoveries

## Client

The client organization is a multi-entity health system of 200+ beds that is part of a larger academic medical system.

## Background & Challenges

After performing some random credentialing file reviews, the organization discovered that several of their credentialing files were incomplete and/or lacked appropriate documentation. The organization was concerned that these findings were not isolated and that many of their credentialing files might lack the proper documentation.

The organization's long-term medical staff services department (MSSD) director voluntarily resigned due to the issues identified during the credentialing file reviews. The remaining staff had limited to no experience in credentialing and privileging. In addition, the medical staffs at both of the system's entities were recently unified, resulting in several physicians serving in new leadership roles as well as still implementing new provisions in the medical staff bylaws.

Being a member of The Greeley Membership Program and having attended Greeley national seminars in the past, the organization turned to The Greeley Company for assistance with a credentialing file audit. In addition, they asked Greeley to assess the current state of their MSSD operations and provide feedback and recommendations on how to improve the department.

## Greeley Findings & Solutions

The Greeley Company brought to the project a unique combination of capabilities including state-of-the-art credentialing methodology and proprietary scoring for a highly effective MSSD and a comprehensive team of nationally respected, experienced credentialing consultants.

The organization received Greeley's assistance with their goals and objectives in five main areas:

1. Auditing of credentials files
2. Assessment of credentialing and privileging functions
3. Identification of opportunities to incorporate leading practices

4. Evaluation of credentialing workflows
5. Evaluation of staff skill sets and competencies

Greeley's assessment revealed the following seven significant findings:

- Noncompliance with a handful of CMS and TJC requirements, as well as with new medical staff bylaws
- Noncompliance with many NCQA standards related to delegated credentialing for the IPA
- Organizational risk due to expired malpractice insurance
- Lack of criteria-based core privileging forms
- Significant opportunities for improving staff skill sets and competencies
- Lack of operational policies and procedures to provide structure to the credentialing and privileging process—resulting in inconsistent processes and lengthy turnaround times
- Outdated, paper-dependent processes with suboptimal utilization of technology

Greeley provided an executive summary report and recommendations for the above, including an action plan with steps needed to achieve compliance, mitigate risk, and design a highly effective MSSD and credentialing & privileging process. In addition, the Greeley team included a confidential addendum report of staff skill sets to help the organization plan its developmental training programs.

## ABOUT GREELEY

### *The Greeley Company*

Headquartered in the greater Boston area, The Greeley Company has served administrative and clinical teams in more than 700 healthcare organizations nationwide over the last three years—ranging from the largest healthcare systems and academic medical centers to critical access rural hospitals. We have a rich history of providing innovative consulting, education, outsourcing solutions, interim staffing, and external peer review to healthcare organizations nationwide. Greeley focuses on contemporary needs and challenges related to medical staff optimization & physician alignment; accreditation, regulatory compliance & quality; and credentialing & privileging.

### *Our mission*

The Greeley Company's mission is to help healthcare organizations improve efficiency, comply with regulations and standards, achieve practitioner engagement and alignment, and excel in delivering high-quality, cost-effective patient care.

### *Our clients*

Our clients include healthcare organizations of all sizes and types—from large, multi-setting healthcare systems and academic medical centers to critical access rural hospitals. We work with clinical and administrative individuals and teams across the entire organization including physicians, executives, directors, managers, and frontline staff.

### *Our advisors and staff*

The Greeley Company provides our clients with a dedicated team of advisors who bring valuable experience and rich backgrounds as former hospital, nurse, and physician executives, as former “Big 4” consultants, and as former regulatory surveyors. Our professionals understand your pain and provide the breadth and depth of preparation, training, and education needed to drive success. Behind our advisors stand talented management and support staff committed to ensuring the highest level of customized attention and client fulfillment.

### *Contact us*

Please contact us at 888/749-3054 or [info@greeley.com](mailto:info@greeley.com) for more information on how The Greeley Company can help you meet your challenges and goals.