

Provides step by step process for enter iResponse indicator and setting up Committee and Board meetings

**TEMPLATE LETTER TO BE USED FOR ROUTINE
AFFILIATION VERIFICATIONS
CONFIDENTIAL
NEWPEER REVIEW DOCUMENT**

July 9, 2019
Dr. Finn Belor
123 Miracle Lane
Nashville, TN 37206

Re: [Robert Brandt, MD]

This letter acknowledges receipt of your request for verification of the above Practitioner's affiliation with the below entity(ies). The information about the Practitioner is current as of the last Board meeting:

Entity Name	Specialty	Category	Last Board Meeting Date ³	Status ^{1,2}	Original Appt. Date	Appt. End Date
XYZ Facility	Internal Medicine	Active Staff				

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XYZ Facility	Internal Medicine	Active Staff				

NOTES:

¹ If "Good Standing" is referenced in the status field:

- **prior to July 11, 2019**, "Good Standing" means that no professional review action as defined in the Health Care Quality Improvement Act (HCQIA) has been taken regarding this Practitioner.
- **after July 11, 2019**, "Good Standing" means that none of the following events or circumstances occurred with the Practitioner after that date and during the most recent five (5) years the Practitioner was on the Medical Staff, whichever is the lesser of the two time periods:
 - o automatic relinquishment or resignation of appointment or clinical privileges for any reason set forth in the Medical Staff Bylaws and Policies (other than those related to medical record incompleteness/delinquency);
 - o voluntary agreement to modify clinical privileges or to refrain from exercising some or all clinical privileges for a period of time for reasons related to the Practitioner's qualifications or performance;
 - o voluntary agreement to participate in a Performance Improvement Plan;
 - o resignation of appointment or clinical privileges while clinical care, professional conduct, or health status was being reviewed;
 - o resignation of appointment or clinical privileges while under an investigation in accordance with the Medical Staff Credentials Policy, or in exchange for not conducting an investigation;
 - o precautionary suspension of the Practitioner's clinical privileges;
 - o formal investigation in accordance with the Medical Staff Credentials Policy;
 - o a grant of conditional membership or privileges (either at initial appointment or reappointment), or conditional continued membership;
 - o any recommendation that entitled the Practitioner to hearing and appeal rights outlined in the Medical Staff Credentials Policy; and/or
 - o a Health Issue that was assessed under the Practitioner Health Policy.

² If "Contact MSO" is referenced in the "Status" field, other fields are intentionally left blank. Please contact the Entity MSO for information

³ Information is current as of the last date on which the entity Board met to consider credentialing issues.

It is our understanding and expectation that you will maintain this information in a strictly confidential manner, consistent with its protected and privileged status. Thank you.

Users at outside organizations and other HCA facilities will utilize iResponse to generate a letter regarding a provider's standing at a facility. An active provider is defined as a provider that has a check in the Active checkbox on the Corporate tab.

The Letter displays the following information:

- **Entity Name**
- **Specialty**
- **Category**
- **Last Board Meeting Date**
- **Status**
- **Original Appointment Date**
- **Appointment End Date**

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- resignation of appointment or clinical privileges while clinical care, professional conduct, or health status was being reviewed;
- resignation of appointment or clinical privileges while under an investigation in accordance with the Medical Staff Credentials Policy, or in exchange for not conducting an investigation;
- precautionary suspension of the Practitioner's clinical privileges;
- formal investigation in accordance with the Medical Staff Credentials Policy;
- a grant of conditional membership or privileges (either at initial appointment or reappointment), or conditional continued membership;
- any recommendation that entitled the Practitioner to hearing and appeal rights outlined in the Medical Staff Credentials Policy; and/or
- a Health Issue that was assessed under the Practitioner Health Policy.

If "**Contact MSO**" is referenced in the "Status" field, other fields are intentionally left blank. Please contact the Entity MSO for information. Information is current as of the last date on which the entity Board met to consider credentialing issues.

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It is the MSO’s responsibility to indicate in Cactus whether or not a provider is in good standing in order for the iResponse letters to generate correctly.

The following process must be completed for existing (Active and Inactive) providers.

To indicate a provider is in good standing:

1. Select Open a File or Activities.
2. Select Providers.
3. Enter the **name of the** provider in the Find dialog.
4. Click OK.
5. Select the **Entity/General** tab.
6. Click the **box** next to the ID field.
7. Click the green **Add/Plus** icon.
8. Select **“iResponse”** from the Type dropdown menu.
 - No dates are required.
9. Select **“Good Standing”** on the same line.
 - The In **Good Standing** Letter will not generate if the provider has “None/NA” listed.

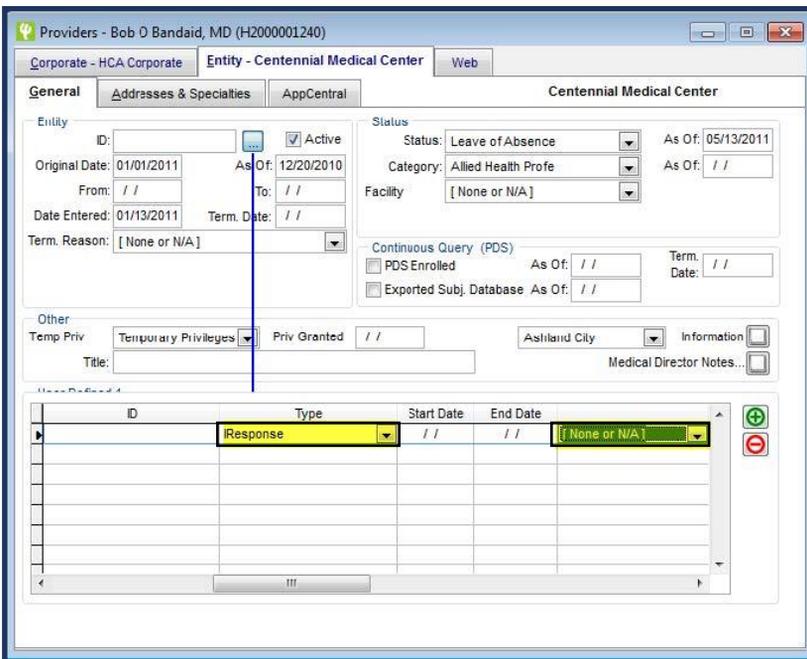
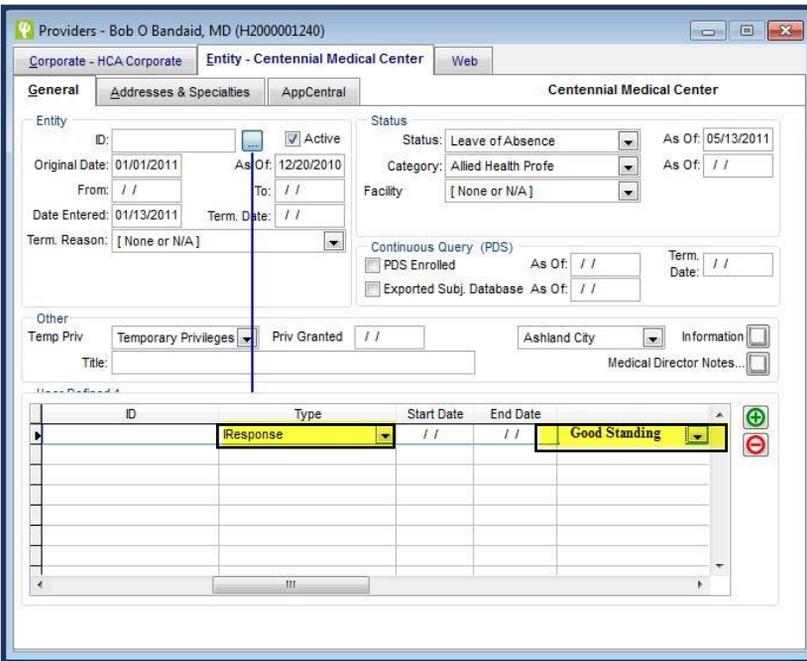
To indicate that the requestor should contact the MSO for additional information:

- Follow the steps above and select **“None/NA”** instead of **Good Standing** as the indicator

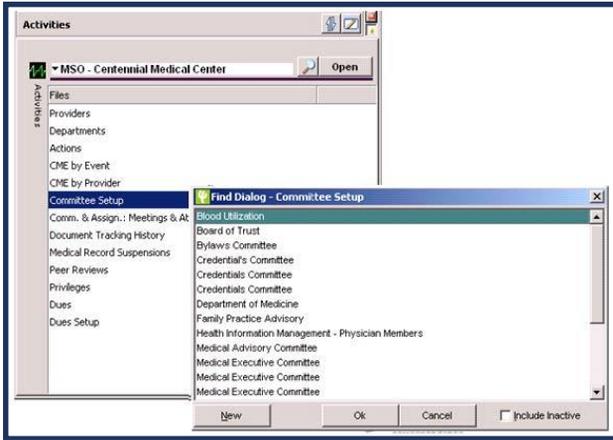
For a letter to generate out of iResponse for a given provider, an iResponse ID must be associated with the provider.

Note:

- Keep in mind the Institution on the Affiliation record **MUST** match the Institution on the Entity record.



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The last board meeting date is displayed on the In Good Standing Letter for an Active Provider. The MSO is responsible for updating the board meeting dates in Cactus by creating a Committee/Meeting in Cactus.

Note: If you are adding additional meetings in Cactus, and have an existing Executive Board set-up, you may skip to step 2.

How to create an Executive Board Committee Meeting:

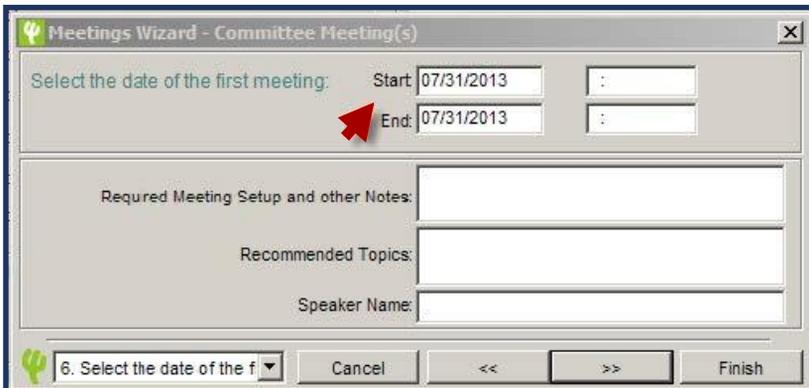
(These steps are also outlined in the Cactus MSO Training guide.)

1. Select **Activities/Committee Setup**.
2. Click **New**.
3. Enter **“Executive Board”** as the description.
4. Click **Save**.

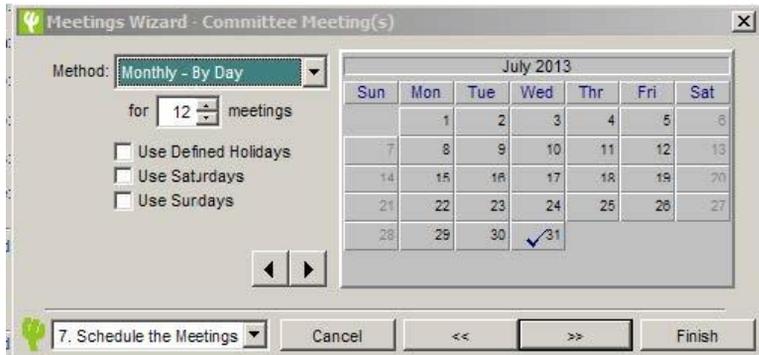
How to create a Recurring Executive Board Meeting:

1. Select **Activities/Meetings & Attendance**.
2. Select **Committee Meetings**.
3. Select **New**.
The Meetings Wizard appears
4. Select the **>>** button.
5. Select Committee **Meeting (s)**.
6. Select **>>** again.

A list of committees appears



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Select the **Executive Board** (it is imperative that it be named exactly as it is shown).

8. Next select >> 3 times (to ignore the CME and location steps).
9. Next put in the 1st meeting date in the series you are creating.

Note: The start and end date will be the same day. This functionality is intended for meetings that last multiple days. You can also add those times if you like, but it is not required.

10. Click >>.
11. Select the **method** that **your recurrences** occur.

Notes:

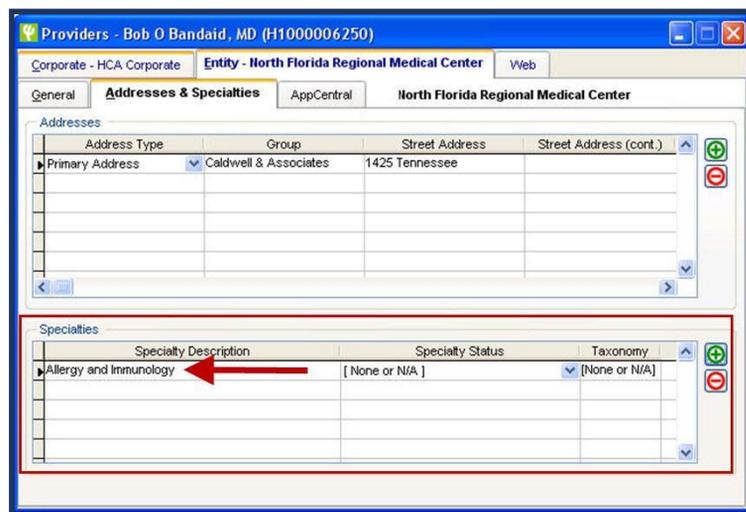
- **Monthly by Date** will create meetings each month on the same date (i.e. every month on the 5th).
- **Monthly by Day** will create meetings each month on the day you selected for the first meeting (i.e. the 2nd Wednesday of each month).

You can also select Weekly or Bi-Weekly if needed.

12. Select >> twice, and select **Finish**.

Notes:

- You will then see a one year series of meetings. You can toggle to the additional meetings, by clicking the Next Record button.
- Each year you should complete this task to add your **Executive Board** meetings for the year.
- *If your Executive Board Meeting Date changes, it is imperative that you change it in Cactus, as it will appear in iResponse.*
- If your meetings are quarterly, you will not see this option; however you can set them up monthly, and use the Delete Button to clean up the records.
- While on the records that are not needed, select the Delete Button (Red X) to remove them from the series.
- If the meeting dates are not entered into Cactus, the system will generate a Contact Medical Staff Office (MSO) Letter for all providers. If your meetings aren't updated each year, iResponse will continue to populate the last meeting date in Cactus.



The Provider's specialty displays on both the In Good Standing Letter for an Active Provider and the In Good Standing Letter for an Inactive Provider. This specialty is pulled from the Entity Address & Specialties tab.

To add an entity-specific specialty

1. Select Activities from the Cactus Organizer toolbar.
2. Select Providers.
3. Search for the provider in the Find dialog.
4. Select the provider to open the provider record.
5. Select the **Entity tab/Addresses & Specialties**.
6. Click the green **Add/Plus** icon in the specialties section.
7. Select the **Specialty**.
8. Click **Add** and **Close**.
9. Save the record.

Note:

If there is no entity-specific specialty associated with the provider, the system will generate a Contact Medical Staff Office (MSO) Letter.