

# Utilizing The Greeley Membership Program to Prepare for a Joint Commission Survey

*Process enables leadership, staff to overcome ongoing survey challenges*

## **Client**

A rural, 225-bed tertiary care facility and teaching hospital with a large complexity of services.

## **Background & Challenges**

As this membership client was preparing for their Joint Commission survey, they sought to leverage onsite consulting assessments with offsite membership resources to optimize their state of readiness.

## **Greeley Findings & Solutions**

As is frequently the case when longer-term relationships are established through the membership program, **The Greeley Company** becomes a knowledgeable partner in the organization's accreditation and compliance activities.

The first step in assisting this organization in survey readiness was to conduct an onsite assessment. The two Greeley senior advisors assigned to the engagement—a clinical nurse and an environment of care/life safety expert—worked collaboratively with the client prior to coming onsite to develop a customized agenda.

The Greeley advisors uncovered several key findings:

### *Behavioral Health Crisis Team*

One of the findings that Greeley uncovered pertained to the behavioral health crisis team and the medical record. The crisis team's patient assessment must be included in the medical record, as it is critical information that the physician uses to complete the medical screening exam (MSE) and determine if an emergency condition exists—just like lab and radiology tests are used by qualified medical persons (QMPs) to make care decisions.

If the patient assessment was completed prior to the patient presenting to the hospital, that information should be provided as any medical record from an outside source would be. If the assessment information was not included in the patient's record, then another assessment should be completed. Either way, the assessment information must be in the medical record.

Greeley advisors found that while the medical record must contain the full patient assessment that the crisis team performed, this information was not always present. They note that even in cases where the behavioral crisis team was provided by the state/county, it is the responsibility of the hospital to assure that the staff is competent to perform the service. To that end, the provider group staffing the crisis team should be considered a contracting service.

Greeley's recommendation to the hospital was to discuss the crisis team provider group's responsibility for providing the patient assessment in the medical record as part of the contractual relationship.

### *Emergency Medications, Supplies, and Equipment*

During their assessment in the operating room suite, the Greeley advisors noted that the only malignant hyperthermia cart was located in the main operating room. Although a rare circumstance, malignant hyperthermia is a condition that can occur with the use of general anesthesia and succinylcholine and constitutes a serious crisis in need of immediate treatment. It was unclear to the advisors how the malignant hyperthermia medications and supplies would be immediately available in other areas such as the C-section operating room, emergency department, and interventional radiology.

Greeley's recommendation in this case was to perform a risk assessment of the availability of equipment and supplies in an emergency circumstance and act accordingly.

### *Protocols and Procedures*

During assessment of the physician practices, it appeared to the Greeley advisors that procedures/protocols that the nursing staff performs were not clearly defined and often lacked appropriate orders.

For example, physician orders for urodynamic testing in the bladder clinic were confusing. While each test has several components and each component has separate procedures, not all providers were ordering components separately.

During discussion, the Greeley advisors received explanation that nurses “know” which components the ordering providers want performed. The advisors pointed out to the hospital that this could be viewed as a scope of practice issue, where nurses actually order the tests.

In addition, the advisors found that the nurses often had difficulty accessing the procedures/protocols for the testing process (accessing protocols and procedures was actually a common theme throughout the survey). They noted that the nursing team needs to have the protocols and procedures readily available.

In this instance, Greeley recommended that the hospital examine its processes and ordering practices for similar areas. Where it finds that not all components are performed 100% of the time, then require that each component must be ordered separately. In addition, Greeley advised the hospital to identify where procedures are performed upon the order of a physician and assure that the procedures are readily available and that the procedural steps are clearly defined.

### **Greeley Deliverables**

Similar to Greeley’s project-based engagements, membership clients receive detailed assessment reports and work plans. Additionally, The Greeley Membership Program provides an additional layer of support to supplement the onsite activities, as described below.

#### *Exclusive Document Library*

The membership advisors worked with this client to customize the following tracer tools exclusively available in the membership document library:

- Emergency Department Tracer
- OB Delivery Tracer
- OB C-Section Tracer
- Inpatient Surgical Tracer Review Form
- Inpatient Medical Tracer Review Form
- Infection Control Tracer

#### *Quarterly Members-Only Audio Conferences*

The Greeley Membership Program conducts quarterly members-only webinars that focus on hot and emerging topics within the industry. A membership webinar focused on the recent Joint Commission Executive Briefing meeting in Chicago was particularly timely for this membership client, as the webinar

presented the top findings and citations for 2014, as well as areas of emphasis hospitals can expect during their 2015 surveys. Because the webinars are recorded and archived on the membership website, this client could hear and share the presentation and slides with their staff on-demand.

### *Membership Advisor Services*

As part of the dedicated advisory hours the membership program includes, the advisors reviewed their report with the client and provided coaching and guidance on how to best implement the action plan. The membership advisors will return onsite to reassess the areas identified for improvement in order to document improvement and provide further recommendation, as needed.

### **Conclusion**

As this client prepares for their upcoming Joint Commission survey, The Greeley Membership Program will continue to support them in both preparing for their survey and in responding to survey findings, if needed. The membership document library contains hundreds of policies for this client to compare and customize, and Greeley senior advisors are available via telephone and email to support their efforts in their survey year.

# ABOUT GREELEY

## *The Greeley Company*

Headquartered in the greater Boston area, The Greeley Company serves administrative and clinical teams in more than 500 healthcare organizations nationwide each year—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.