

Development of an Advanced Practice Clinician (APC) Onboarding and Credentialing Process for the Department of Surgery and Perioperative Services

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Introduction

This quality improvement project focuses on the development of an orientation and evaluation process for new Advanced Practice Clinicians (APCs) in the Department of Surgery. Through the creation of a structured onboarding/credentialing process and systematic evaluation plan for APCs, it is hoped that all mid-level providers will better understand their roles and responsibilities as well as the expectations as set forth by the Department of Surgery. Further this process will promote the maintenance of core competencies.

Credentialing and onboarding are extremely important processes for the retention and success of APCs. APCs are often assimilated onto the staff of health care organizations in a disorganized manner due to the lack of a structured process for onboarding and credentialing. This can result in provider dissatisfaction and a high rate of turnover as well as decreased patient satisfaction. Having an established, structured onboarding process for surgical APCs can help to increase provider and patient satisfaction and promote retention. The clarification of expectations allows providers to opportunity to better understand the Lehigh Valley Health Network's (LVHN) Department of Surgery practices. After the APC is oriented and appropriately credentialed, there is an ongoing professional practice evaluation (OPPE) that needs to be completed to ensure the APC remains clinically competent and adheres to the policies and procedures outlined by the Network. The provider and supervising physician will complete this evaluation twice a year. As part of the OPPE, the APC is responsible for reporting their continuing medical education (CME) credits to LVHN.

Methods

The initial step in creating an onboarding and credentialing process was to develop a Focused Professional Practice Evaluation (FPPE) for surgical APCs. The FPPE is divided into two parts, orientation and credentialing. The orientation helps to familiarize the APC to the network and Department of Surgery. Credentialing is necessary to secure privileges in the operating room and other units. At the outset, there was no set orientation program for mid-level providers in the Department of Surgery at LVHN. Therefore, information regarding APC training in other departments within LVHN was gathered and reviewed. Additional research was performed to seek out evidence pertaining to surgical APC credentialing and a draft FPPE was completed. To assist with the orientation process, a module on The Learning Curve (TLC) was created that focuses on policies and procedures to ensure that all of the providers are knowledgeable with respect to OR policies and procedures. Additional education sessions offered through the Surgical Education Center are also recommended to ensure clinical competency for surgical APCs. These sessions need to be completed before the surgical APC goes to the Operating Room (OR).

The OPPE was developed through a review and compilation of existing evaluation processes for APCs from different units at LVHN as well as research of existing publications and online resources. Based on this information, the six core competencies named by the Joint Commission of Health were utilized to create the basis of the OPPE for the surgical APCs. These competencies evaluate effective and appropriate application of medical knowledge, interpersonal and communication skills, patient care/ professionalism, practice-based learning, and systems-based practice. Based on the available research, several questions were developed for each competency that is to be evaluated. These competencies should be evaluated twice a year and the results shared with the APCs. This allows for appropriate feedback and early intervention if there are issues that arise.

Additionally, the APC is afforded the opportunity to voice any concerns that he or she may have regarding their role.

Results and Discussion

To grant medical privileges, The Joint Commission of Health requires a FPPE to be completed by administration in the respective department during the orientation process. An onboarding checklist was created to offer guidance and provide sequential flow to the orientation process. The first part of this checklist is a 3 day orientation; Connections at LVHN, Lehigh Valley Physician Group Orientation, and Department of Surgery Orientation. At the DOS orientation, the APC receives their scrubs, pager, locker assignment, etc. The provider will complete Electronic Privacy Information Center (EPIC) and email training, as well as direction to complete all modules on TLC. Some of the modules include the new employee bundle and quarter core competencies (both network wide). All surgical APCs will then complete a module created for policy review. These policies must be read and signed. The credentialing process includes a tour of the OR, familiarization of the tracker system (at Cedar Crest), and further review of OR policies. All surgical APCs will then complete a scrubbing/gowning session and suture session in the Surgical Education Center. After this has been completed, the supervising physician will complete the proctoring form. At this time, appropriate privileges will be granted to the APC. The orientation and FPPE checklist are shown in Table 1.

The Joint Commission of Health requires ongoing evaluations to be collected to review and improve provider-patient care. These evaluations will be used to determine the status of the provider's privileges (maintain, limit, and revoke). The new OPPE form will be collected electronically bi-annually. One set of evaluations, in January, will be completed by the APC's supervising physician in regards to the six core competencies stated above. There will be three choices for each competency: 1) Acceptable, 2) Needs Improvement, and 3) Unacceptable. The reports are then gathered and reviewed by administration in the Department of Surgery. The competencies and questions are shown in Table 2.

During the second cycle of OPPE collection in July, the APC will be responsible for submitting their OPPE self-report which will then be collected and reviewed. The APC is also responsible for updating their ongoing continuing medical education (CME) credits and renewal of their license to practice in a timely manner. By collecting the evaluations in addition to the CME report, LVHN will be able to show the Joint Commission of Health that the surgical APCs remain clinically competent and certified to practice medicine. Additionally, this information can be used in determining whether to maintain, limit or revoke certain privileges.

Conclusion

This quality improvement project focused on the onboarding, credentialing, and ongoing evaluation of surgical APCs at LVHN. With the creation of an onboarding checklist and OPPE form, the Department of Surgery can ensure that all of their mid-level providers are meeting all core competencies, staying up to date within their chosen field of practice and providing quality care for the patients in our community. Additionally, these processes are in alignment with the guidelines set up by the Joint Commission of Health.

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References

The Joint Commission. (2013, March). *Standards boosterpack for focused professional practice evaluation/ ongoing professional practice evaluation (FPPE/OPPE)*. Retrieved June 2014 from LVH intranet.

**DEPARTMENT OF SURGERY
APC ONBOARDING CHECKLIST**

EMPLOYEE INFORMATION	
Name:	Start date:
Position:	Completion date:
Site Mentor:	
SIGNING TO START DATE	
<input type="checkbox"/> Ensure APC is credentialed with Hospital medical staff prior to start date. <input type="checkbox"/> Schedule appointment to get photo taken with Janet Seifert @ 610-402-8590. <input type="checkbox"/> Ensure provider has access to the X-Drive.	
FOCUSED PROFESSIONAL PRACTICE EVALUATION- Orientation Process	
<input type="checkbox"/> LVHN Orientation (Connections) <input type="checkbox"/> LVPG Orientation (if needed) <input type="checkbox"/> Department of Surgery Orientation <ul style="list-style-type: none"> • Pick up lab coat, scrubs, pager, and OR locker assignment. <input type="checkbox"/> Medical Record Training <input type="checkbox"/> Coding Compliance <input type="checkbox"/> Computer Training: <ul style="list-style-type: none"> • EPIC • E-mail communication <input type="checkbox"/> TLC Core Bundles <ul style="list-style-type: none"> • Quarter Core Competencies • Policy Review • Radiation Course & Badge Form Completion (as needed) 	<input type="checkbox"/> Presentation from APC Executive Council <input type="checkbox"/> Campus Maps & Tour of OR <ul style="list-style-type: none"> • OR Tracker System (Cedar Crest only) <input type="checkbox"/> Surgical Education Center <ul style="list-style-type: none"> • Scrubbing/Gowning Session • Suture Session <input type="checkbox"/> Proctoring form completed during first 12 months of employment

CLINICAL POLICIES AND PROTOCOLS

Review Key Policies on TLC

- Operation Room Rules and Regulations
- Dress Code
- Surgical Attire
- Gowning and Gloving
- Surgical Scrub
- Physician Ticket to the OR
- Identification of Patient and Site
- Positioning of the Surgical Patient
- Standard Precautions
- Preinduction Briefing/Debriefing Process
- Sharps Disposal
- Fire in Operating Room (Code Yellow)
- Malignant Hypothermia Crisis
- Interpreters/Communication Assistance
- Telephone and Verbal Orders

I have received New employee orientation and understand each of the policies and procedures. I understand the importance of following these procedures in order to participate as a successful member of the Department of Surgery.

Physician Assistant Signature _____ **Date** _____

Supervising Physician Signature _____ **Date** _____

Please return to the Department of Surgery when completed.

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Table 2. Competencies for OPPE

Patient Care

- Competently and appropriately participates in surgical procedures including:
 - o The use of sterile technique
 - o Assistance with patient positioning and draping
 - o Assistance with tissue retraction
 - o Assistance with wound closure

Medical Clinical Knowledge

- Follows operating room policy and procedure
- Interacts appropriately and knowledgeably with all surgical patients
- Demonstrates knowledge of surgical procedures

Practice Based Learning and Improvement

- Mindful of improvement measures
- Adapts to changing clinical situations
- Demonstrates self-learning
- Facilitates student learning when appropriate

Systems Based Practice

- Uses medical information and understanding to provide patient care efficiently

Interpersonal Communication Skills

- Communicates with patients and families using AIDET
- Interacts appropriately with colleagues

Professionalism

- Provides assistance to the physician while maintaining ethical practices
- Is sensitive to the patient and their needs
- Demonstrates PRIDE behaviors