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Chief Credentialing Officer

Sally Pelletier is Chief Credentialing Officer with Greeley. She brings over three decades of credentialing and privileging experience to her work with healthcare organizations nationwide.



**Frances Ponsioen, CPMSM, CPCS**  
Associate Partner

Frances Ponsioen is an Associate Partner with Greeley. She brings more than 25 years of healthcare experience to the firm, particularly in the areas of accreditation, regulatory compliance, credentialing, privileging, medical staff services operations, and centralized credentialing operations.

Greeley has confirmed that none of the faculty/presenters or contributors has any relevant financial relationships to disclose related to the content of this educational activity.

### COURSE DESCRIPTION

Manage Today's Most Difficult Credentialing and Privileging Issues. This education will provide credentials committee members, medical staff leaders, and medical services professionals with the skills and knowledge necessary to design a credentialing and privileging program that protects patients, is fair to physicians and clinicians, and complies with accreditation and regulatory requirements.

### PROGRAM GOAL

Provide essential knowledge and skill sets to enhance medical staff leaders and medical services professionals' ability to effectively fulfill their credentialing- and privileging-related responsibilities.

### LEARNING OBJECTIVES

*Upon completion of this program, participants should be able to:*

- Explain the implications of recent legal cases and landmark cases on credentialing practices today
- Set up effective strategies for minimizing the risk of negligent credentialing lawsuits
- Formulate options for how to credential and privilege various types of low- and no-volume practitioners
- Identify best practices for aligning privileges with competency
- Illustrate a practical approach to effective initial focused professional practice evaluation (FPPE)
- Formulate options for managing dual (management, medical staff) responsibilities related to employed physicians
- Identify effective strategies for managing temporary privileges

## AGENDA

The Credentialing Solution | 3 Day National Agenda

San Diego, CA | January 28-30, 2027

### DAY 1 - JANUARY 28, 2027

#### 7:00 – 8:00 AM Breakfast

##### Landmark Cases Establishing Legal Precedent

A face with many names e.g., negligent credentialing, corporate negligence, negligent selection – Doctrine of charitable immunity professional reference requests –Duty to exercise due care – Protection from immunity – Grandfathering – friend or foe? – Responding to professional reference requests

#### 8:00 – 10:30 AM Principles of Effective Credentialing & Privileging

Controlling pressure to quickly credential from influential groups or individuals – Balancing patient care, physician success, hospital success – Deciding who must be credentialed and privileged – Dealing with superb clinicians with suboptimal citizenship – Going beyond the traditional steps of credentialing – Managing unusual privileging requests – Matching competency with clinical privileges

#### 10:30 – 10:45 AM Break

### Roles and Responsibilities in Credentialing

Who owns credentialing and quality? – What is the Department Chair’s role? – What is the credentialing committee’s role? – What is the medical services professional’s role? – Recognizing the untapped value of the MSSD as a strategic asset

### 10:45 – 12:15 PM The Greely Pyramid

Keys to achieving great physician performance – Accountability of the medical staff

### If You Don't Ask, They Don't Have to Tell

Obtaining the most value from verifications – leading practices – What to ask the applicant? – The who and the what for peer references – Removing invasive mental health questions from applications

### 12:15 – 1:15 PM Lunch

## DAY 2 - JANUARY 29, 2027

### 7:00 – 8:00 AM Breakfast

### How do you know what to look for when Analyzing a Credentials File?

Identifying red flags – Resolving red flags to avoid legal risk

### 8:00 – 10:00 AM Performance Monitoring for Credentialing and Privileging

Ongoing Professional Practice Evaluation – What is the role or OPPE in credentialing and privileging?  
Focused Professional Practice Evaluation – What is it? – Why do it? – Does one size fit all? – Lessons learned

### 10:00 – 10:15 AM Break

### Practicing but Not Perfect

10:15 – 12:15 PM National Landscape – Case Studies: – The increasingly narrow practice – No current clinical activity – Returning from leave – Practitioner Re-entry – Not board certified

### Dealing with the Evolving Landscape of Employed Practitioners

Case Studies

### 12:15 – 1:15 PM Lunch

## DAY 3 - JANUARY 30, 2027

### 6:00 – 7:00 AM Breakfast

### How to Run a Meeting

Meeting Preparation – Agenda Management – Chair Tips – Documenting to Mitigate Risk

### 7:00 – 9:00 AM How to Create Privileging Criteria from A to Z (new privileges, technology, services, specialties, expanding scopes of practice)

Case Studies – Five steps to successfully managing requests for new services and new technology – How to manage privileging turf battles

### 9:00 – 9:15 AM Break

### Potpourri of competency assessment challenges for low and no volume practitioners

Defining patient, community, and hospital need – What can be done to reduce risk and protect patients – Where do locum tenens fit in this picture?

### 9:15 – 11:00 AM How to manage the expanding clinical role of APPs

Addressing ‘training up’ in a non-traditional training environment – Determining organizational culture – Liability carrier considerations – Policy considerations – Privileging – Which comes first, the chicken or the egg?