Edge-U-Cate, LLC
Speakers' Bureau Presents

Educational Choices for Medical Services
&
Credentialing Professionals

www.edge-u-cate.com

2026

Edge-U-Cate
educational resources on the cutting edge

Edge-U-Cate speakers are available to present all the topics included below for your organization's educational program needs or **we can build a customized program** to meet your members' education needs.

Featured Programs

These programs can be presented as "Bonus Days" before or after your State Conferences or at other times throughout the year.

-CPCS® and CPMSM® Certification Focused Study Program for NAMSS® Certification (1 or 1.5 day program – virtual or onsite)

-"Quick Start – Fundamentals of Credentialing" (1 day program – virtual or onsite)

Current Popular Topics
<u>Speakers listed are Primary Faculty for most topics, substitutions may be made</u>

PROGRAM TITLE	PROGRAM SUMMARY
"Quick Start – Credentialing Fundamentals" 8 hours Presenter: Cris Mobley &/or Chris Giles	This is a condensed version of Edge-U-Cate's full 32 hour course offered nationally but can be added before or after a state's conference or other time. It will cover what is credentialing, why we credential, who credentials, accreditation bodies, confidentiality, and the principles of initial appointment, reappointment, privileging and performance evaluation, and include how and where to primary source verify the information needed to make recommendations to the Board. An excellent primer for beginners or good review for others.
EDGE-U-CATE CPCS®/CPMSM® <u>Certification</u> <u>Focused Study Program</u> 1 day CPCS® only program (onsite or virtual) 1.5 day CPCS/CPMSM® program (onsite or virtual) 1 day CPCS/CPMSM® (onsite or virtual) with additional 3 hours prerecorded CPMSM material provided) Presenter: Janet Wilson All study resources are provided along with a guide for studying and study questions.	Edge-U-Cate offers a very comprehensive <u>onsite</u> or <u>virtual</u> CPCS/CPMSM® **<u>Certification</u> <u>Focused Study Program</u>** designed to help MSPs study for the NAMSS CPCS/CPMSM® certification exams. We have taught this very successful program for 16 years and have received many testimonials of success from MSPs in the industry. The courses we offer are formatted for a 1 day or 1.5 day program and includes a very focused study environment for those studying for either the CPCS® or CPMSM® NAMSS certification exam. All study resources are provided along with sample study questions and tools and tips for studying for the exam plus one-on-one time with the instructor during and after the study program.

PROGRAM TITLE	PROGRAM SUMMARY
Beyond Hospitals – Where else do credentialing and privileging matter? (1 hour) Presenter: Cris Mobley	Credentialing/Privileging has become an expansive industry as we know. Opportunities for MSPs have greatly expanded, not only in multiple types of hospitals and non-hospitals, but the virtual world has opened up opportunities as well. This session will describe additional environments such as FQHCs/look alikes, community health centers, ASCs, tribal clinics, and student health centers to name a few as well as who accredits them; e.g., HRSA, IHS, AAAHC, and more.
Move To A Three Year Reappointment Cycle: To Change Or Not To Change, That Is The Question?? (1 hour) Presenter: Janet Wilson	The Joint Commission recently revised their medical staff standards to allow for a three year schedule While many in the industry review this change as favorable, there are a multitude of decisions that must be made before this change should occur. In this program, we will discuss the pros and cons of transitioning to a reappointment period of three years, and discuss the regulatory, accreditation and governance document factors that will need to be evaluated and considered.
Are you Up to Date?? Accreditation Standards Updates for 2026 (1 hour)) Presenter: Janet Wilson	There have been some updates to Accreditations Standards that affect our industry. During this session we will highlight and discuss the recent updates and compliance requirements.
Meet your new Co-Worker: AI in the MSO (1 hour) Chris Giles or Cris Mobley (or can co-present)	This is new territory for all of us. This session will explore AI use in the credentialing/privileging, and Medical Staff Services role looking at the possibilities and the risks of its use. Discussion will include some of the legal considerations that need to be determined as well as the cultural considerations and how to work towards acceptance of its use.
Silence is Risk: Recognizing and Responding to Red Flags (1-1.5 hours) Presenter: Cris Mobley	It's one thing to collect data related to an application or reapplication. It's another to be able to identify some of the "flags" raised when assessing that information once received. The more you experience you have processing files, the more you develop a "sixth sense" to know there's something not quite right. This session will identify common and uncommon red flags that should be addressed and steps to take depending upon the nature of the information received.

PROGRAM TITLE	PROGRAM SUMMARY
How are you doing? Is it Time for an MSP Happy Hour?? (1 hour) Presenter: Janet Wilson	This has been an exhausting year in our industry. Our workload has increased and we have had to learn new ways to do our jobs and support our leaders. Our stress is at levels some of you may have never experienced. Question…..how are you managing your stress? Have you found ways to balance your life in this new environment? Let's discuss and share ideas on how to get through these times together and celebrate our achievements.
The Many Faces of Non-Routine Privileges 1-1.5 hours Presenter: Cris Mobley	Presentation of those "other" types of privileges, temporary x2, locum tenens, provisional (NCQA), telehealth, &expedited – when should you use them and what do the standards allow or not mention. Are your processes for what you utilize documented in the bylaws and/or policy?
Ignore, Manage, Report?? How do you address physicians who resign with red flags? (1 hour) Presenter: Janet Wilson	Do you have physicians who resign with red flags in their file you are tracking/trending? Do you have a policy that requires you review/address red flags before allowing the physician to resign? Is there language in policy or bylaws that will not allow a practitioner to reapply for membership/privileges if they resigned with outstanding red flags in their file? Lets discuss best practices to consider.
Need to Know v. Good to Know – What *must* **be verified and what should/could be verified in the credentialing process** (1 hour) Presenter: Cris Mobley	Between accreditation standards, industry practice, state statutes and company policy, it's often confusing to know what *has to be verified* and where everything else comes from. Frequently, when asking people why they do something, it's either "because Joint Commission says so" or "because we've always done it that way." Both can be true OR maybe not. This session will discuss what the standards and regulations *require* in the credentialing process, with very few outliers, and what may be optional as well as make sense as our industry strives to check every nook and cranny to find out as much as possible about a new applicant.
VERIFY AND COMPLY: Credentialing across the Spectrum of Hospitals, Surgery Centers and Managed Care (3 hours) Presenter: Janet Wilson	As a former co-author of HCPro's Verify & Comply: Credentialing, Medical Staff, and Ambulatory Care Standards, Janet will share a comprehensive comparative review of all regulatory and accreditation standards. This program also helps support those MSPs currently seeking NAMSS certification and supports professional development for those experienced in the industry seeking updates to their resources and knowledge base.

PROGRAM TITLE	PROGRAM SUMMARY
Invisible Work, Real Stress: The MSP Experience 1.25 hour Presenter: Cris Mobley	Stress – it comes with the job! It can lead to burnout which is worse. Don't go there, please. We'll define causes of stress in the workplace, define the symptoms of stress and burnout, and some innovative ways to avoid or at least lessen the load. Deep breaths and a little chair yoga.
Accreditation Standards and Industry Standards are NOT the Same – Know the Difference (1 - 1.25 hours) Presenter: Cris Mobley	Many people believe that because policies dictate how to process an application or reapplication, it is required by the accreditor and/or CMS. Not necessarily true. Much of what MSPs verify and/or collect during this process is due to "industry" standards because it makes sense. There is often confusion as to what's required and what is done to supplement the requirements. In this session, we will differentiate between the two, addressing "myths" about the origin of the processes we follow. You may be surprised!
Find Your Voice – Crucial Credentialing Discussions (1 hour) Presenter: Janet Wilson	In our role as medical services professionals, we are sometimes faced with the responsibility of initiating a crucial conversation with hospital leaders and medical staff leaders regarding problematic findings identified during the credentialing or peer review process. In this program we will share scenarios on how to prepare for crucial conversations, how to relay important information necessary to support an educated, not emotional decision by the hospital or medical staff leader and also how to be persuasive and provide influence, if necessary, to succeed in conversations with leaders.
From chaos to Clarity: Mastering Modern Meeting Techniques (1-1.5 hours) Presenter: Chris Giles	Explore the current tools available for ensuring that useful minutes are maintained for all relevant meetings. Communication skills are key – identifying what those skills are and how to utilize them when administering meetings. Meeting management is a skill – identify what additional abilities/techniques you need to become an experienced professional in meeting management.
Clinical Privileging and Competence Assessment in the Ambulatory Setting (1 hour) Presenters: Cris Mobley or Chris Giles	Many healthcare systems include ambulatory settings. If those settings are under your corporate umbrella – you need to ensure that privileging and assessment of competency is taking place and is meaningful. And if they are independent of a health system, competency assessment is still necessary.
From Outdated to Optimization: **What it takes to Modernize Privilege Forms.** (1 hour) Presenter: Cris Mobley or Chris Giles	New technology breeds new privileges resulting in revisions to maintain current forms/criteria. What should good privilege forms include and not include and what's the MSP's role in review/revision maintenance.

PROGRAM TITLE	PROGRAM SUMMARY
Reducing Organizational Exposure through Smarter Credentialing Practices (1 hour) Presenter: Chris Giles	Learn how to avoid legal and risk problems by establishing a risk assessment approach to the credentialing and privileging processes. Credentialing is not just a paper/information chase; it is the basis for reducing exposure of our patients to incompetent or unknowledgeable practitioners. It is necessary to be aware of the loopholes that some practitioners try to take to avoid being denied privileges or access to patients.
HR and Medical Staff Peer Review – Collaboration is Key to Assuring Patient Safety!! (1 hour) Presenter: Janet Wilson	The AMA recently reported, approximately 51% of physicians are employed. Unfortunately, an increasing number of physicians who are terminated by the employer (HR) for behavior or clinical quality problems are allowed to move freely to another practice with no concurrent or subsequent medical staff peer review action. We will discuss ideas, options and regulatory opportunities for a collaborative approach to peer review for employed physicians.
Navigating Physician Aging and Physician Re- Entry – Tricky but Doable 1 hour Presenter: Cris Mobley	There are fewer and older physicians practicing today. Some have retired but coming back. An interesting dilemma in these times. Discussion will include potential associated risks with both, address policies that need to be in place, share valuable resources to assist organizations in assessing competency levels and review some actual case studies. I twill include an overview of national re-entry trends, guidance on re-entry policies, review of approaches to facilitate an effective and safe transition onto the clinical staff and presentation of case studies
Credentialing Committee Vetting of State Medical Board Information: Applying the Right Diligence (60 minutes) Co Presenter: Janet Wilson	This session will highlight the importance and value of querying information from a state medical board in a manner which yields necessary information. In many cases it may not be sufficient to simply confirm whether an applicant has an active license. Attendees will learn that state medical boards are variable in the speed with which they post actions against licensees, the completeness of the information posted, the length of time in which they keep information posted on their websites, and the manner in which they alert those querying that there is additional information in board files.
Avoiding Negligent Credentialing – Strategies that Protect your Organization (1-1.5 hours) Presenter: Cris Mobley	No one wants to read about their organization in the headlines for a negligent credentialing lawsuit. So, how do you avoid credentialing risk in your organization? Understand why a rushed appointment can come back and bite you, differentiate between well written and vague privileging criteria, and other practical tips plus discussion of actual case studies from an expert witness.
Fortifying the Relationship: Provider Enrollment and Credentialing (1 hour) Presenter: Chris Giles	Discussion will include enrollment and credentialing and lack of relationship and explore the affect of automation on both processes. We will identify the shared data items that support both and look at the advantage of streamlining and data sharing.

PROGRAM TITLE	PROGRAM SUMMARY
On-Boarding – So Many Ways, So Little Time and the Recruitment Connection (1-1.5 hours) Presenter: Cris Mobley	How many avenues do practitioners have to enter your system – locum tenens, temporary privileges, telemedicine practitioners, community based, contract, employed, etc. What is common thread and what outliers do you need to define. Also, what role does recruitment play and where do you fit in?
Strategies for Developing an Effective FPPE and OPPE process for your Medical Staff (1 hour) Presenter: Janet Wilson	An effective FPPE and OPPE process is necessary for organizations to confirm "current competence" of privileged practitioners. We will share tips and tools for development of effective and compliant programs.
Engaging New Physicians Through Effective Orientation (1 hour) Presenter: Janet Wilson	TJC and other accrediting bodies require organizations orient their new practitioners to bylaws, policies and procedures and other governance processes. This course shares how to establish an effective orientation that supports engagement and is an efficient and comprehensive resource for the organization
Advancing Credentialing Quality: A Performance Enhancement Network: aka Utilizing Project Management (1 hour) Presenter: Chris Giles	Identify key performance improvement methodologies and explore ways to apply PI methodology to the credentialing process. Looking back at our process always leads to the possibility of moving forward, changing for the better, looking to be the best we can be for all of our customers. A PI approach provides you an opportunity to take that backward balance and then move forward in a positive way.
We've Come a Long Way, **Baby!** (1 hour) Presenter: Cris Mobley	Looking back at where we came from, where we are, and where we're going. This profession is ever changing, so how do we not only keep up but also get to where we want to go? (an insight from someone in this profession for more than 40 years)
Credentialing and Provider Enrollment: Two Sides of the Same Coin – Are you Heads or Tails? (1.5 hours) Co-Presenters: Chris Giles Mathieu Gaulin	Are you hearing the word "credentialing" being used differently by people these days? There are many functions coming under the umbrella of credentialing but maybe we need to look at the similarities and differences of the functions. This program will review the functions of traditional credentialing and provider enrollment, compare and contrast the tasks and suggest ways that working together may not only enhance the two processes, but could offer some new job opportunities.
Can You Take a Vacation? (1 hour) Presenter: Janet Wilson	Since everyone needs to take vacations, or just needs a mental or physical break, you can proactively prepare for these breaks. In this course we will share tips on how to successfully delegate responsibilities in your absence and how to establish succession planning.

PROGRAM TITLE	PROGRAM SUMMARY
How to Assure you have an Effective Medical Staff Confidentiality Policy and Process (1 hour) Presenter: Janet Wilson	This program will help attendees understand the importance and need for confidentiality in the medical staff and credentialing industry. We will identify key components of a comprehensive confidentiality policy. We will also demonstrate how to establish internal guidelines and processes based on an effective and accountable confidentiality policy.
Lessons Learned – What I would tell my younger MSP Self (1 hour) Presenter: Cris Mobley	Having been in this industry for over 45 years, many lessons and truths have surfaced over time. "Had I known then what I know now….." is so true. What would I have done differently? Some things for sure! This session will share these lessons and truths for those who are still rising stars in hopes you can learn from these oversights. And not to leave those out who are in the sunset of their profession, a few pearls of wisdom will be shared as you navigate the waters of slowing down, retirement……..and looking ahead to your new future.
Collaborative Approach to Developing and Maintaining Delineation of Privileges in your Organization (1 or 1.5 hours) Presenter: Janet Wilson	This course will help you develop a collaborative, ongoing, systematic approach to updating/maintaining privilege forms for your organization. We will also share key parties' accountability and responsibilities in this important process
Transitioning to a Paperless Environment (1 hour) Presenter: Janet Wilson	Learn how to get rid of the paper and transition to a paperless or paper-light office. We will review how to strategically plan for and successfully transition to your new environment.
Is a System CVO the Right Answer for your Organization?? (1 hour) Presenter: Janet Wilson	How to evaluate your hospital's credentialing processes to determine if a CVO approach would be right for your organization. If a CVO is the answer, how to establish an effective step by step process for a successful transition.
Aspire Higher – Stepping up to Leadership (1 hour) Presenter: Cris Mobley	Want to be a leader? Intimidated by leadership? We'll explore leadership positions that are within reach and how to get there. What are the fears associated with leadership roles? You too can learn to speak in front of others. We'll discuss the plan for leadership roles internally and externally (e.g., state associations or other)