

Purpose:

To clarify the Pennsylvania Trauma Systems Foundation's (PTSF) expectation regarding communications between a trauma program clinical consultant and PTSF staff. This policy precludes legal counsel involvement during the survey process.

Process:

1. **Notification of Use**
 - A. If an institution intends on having a consultant act on behalf of the institution related to interaction with the PTSF staff the institution must:
 - i. Provide notification to the PTSF that a consultant is being used, including the expected duration of use, prior to first communication with the PTSF by the consultant.
 - ii. Provide electronic notification to the PTSF at the time the consultant ends employment with the facility.
 - B. If a consultant is being used but will not be interacting with PTSF staff, notification is not necessary.
2. **Consultant communication with the PTSF staff**
 - A. All email communications should include a representative from the institution.
 - B. All other communications, such as telephone calls or virtual meetings, will be documented by PTSF staff with notification of the discussion sent to the trauma program contact.
3. **Role during site visit**
 - A. Depending on the purpose of the consultant at the institution, involvement may vary.
 - i. The PTSF staff must be notified prior to the survey as to the extent of involvement that a consultant will have on survey day. This will aid PTSF staff in preparing the survey team for this involvement.
 - ii. Involvement may include but is not limited to:
 - a. Preparation for survey
 - b. Assistance on the day of survey
 - c. Presence at Opening Conference, Physician and Nurse Meetings, Tours, Significant Issues and Performance Improvement Presentations, Medical Record Review, and Closing Leadership Meeting
 - d. Interaction with survey team/PTSF staff during survey
 - iii. If a consultant is used on the day of the survey, the consultant must always be identifiable.
 - B. Institutions are discouraged from having consultants take a primary role in interaction with the survey team or PTSF staff during survey as the survey team will wish to assess the abilities of the institution staff and not of the consultant.

Approved by PTSF Board of Directors and/or Executive Committee:

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