

### 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 council involvement during the site 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 PTSF staff:
  - i) The institution must provide written notification to the PTSF that a consultant is being used and the duration of that use.
  - ii) At the time the consultant ends employment with the facility the PTSF again should be notified.
- b) If a consultant is being used but will not be interacting with PTSF staff, written notification is not necessary.

#### 2. Consultant communication with PTSF staff

- a) All written and electronic communications between consultants and the PTSF should:
  - i) Include the institution as a courtesy copy recipient of the communications.
  - ii) Be answered by the PTSF in writing with courtesy copies sent to trauma program contacts designated by the institution.
- b) All verbal communications between consultants and PTSF will be documented by PTSF staff in written or electronic format and sent to the consultant and a courtesy copy will be forwarded to the trauma program contacts designated by the facility.

#### 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 site survey as to the extent of involvement that a consultant will have on site survey day. This will aid PTSF staff in preparing the survey team for this involvement.

- ii) Involvement may include but is not limited to:
  - (1) Preparation for site survey
  - (2) Assistance on the day of site survey
  - (3) Presence at Opening Conference, Physician and Nurse Meetings, Tours, Significant Issues Presentations, Medical Record Review, and Leadership Meeting
  - (4) Interaction with survey team/ PTSF staff during site survey
- iii) If a consultant is used on the day of the site visit, 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 site survey as the survey team will wish to assess the abilities of the institution staff and not of the consultant.

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Approved by PTSF Board of Directors:

Original Date: 09/06/2006

Revise Date: 12/06/2006

Review Date: 04/01/2016; 07/01/2019; 09/16/2021

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