



Syllabus

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Technical Issues and Course Assistance

For assistance or questions about this course, please contact AMDA's Education Department:

- Phone: 410-740-9743
- Email: education@paltc.org



THE SOCIETY
FOR POST-ACUTE AND
LONG-TERM
CARE MEDICINE

Course Overview

Welcome to AMDA - The Society for Post-Acute and Long-Term Care Medicine's Online Core Curriculum on Medical Direction. The Online Core is the first part of the Core Curriculum on Medical Direction in Post-Acute and Long-Term Care (PALTC), the only program of its kind that provides the knowledge and training to serve as an effective medical director, while satisfying the educational requirement to apply to become a Certified Medical Director (CMD).

The Core Curriculum is Divided into Two Parts:

- Online Core Curriculum: On-demand presentations and assessments that participants can view online, covering the 22 critical areas impacting PALTC leadership and management. The Online Core also includes a live, one-hour long, virtual opportunity to discuss the course material in real time with course faculty.
- Core Synthesis: A weekend program comprised of dynamic lectures, interactive role plays, case-based discussion, and small group breakouts. Core Synthesis is offered multiple times per year in both in-person and virtual formats. *For more information of the Core Synthesis, including course dates and registration, please go to: <https://apex.paltc.org/page/core-curriculum-on-medical-direction>.*

Online Core Access Instructions:

You can access the entire Online Core Curriculum through APEX, AMDA's Learning Management System, under "My Courses." The link to APEX is: <https://apex.paltc.org/>.

- You should log in using your existing AMDA credentials, the same ones used to register for the course.
- **You will have access to the online core for six months from the date of your initial registration.**
- For any technical, login, or password issues, please email the AMDA Education team at education@paltc.org.

Online Core Modules

There will be a pre-course assessment to complete prior to accessing the modules. There are 22 modules for completion in the Online Core, each module focusing on a different topic. Each module must be completed in sequential order and includes three required elements:

- Completion of the video lecture
- A quiz to test knowledge of the module's contents (you must score 80% to pass the quiz)
- A brief evaluation for you to provide feedback on the module

Each module also includes a link to download a PDF of the presentation. There will be an overall course evaluation after module 22, which must be completed in order to receive your course credit and certificate.

To assist with your course completion, we have provided a recommended 12-week module completion schedule below based on spending an average of 2-3 hours per week on the course. Using this schedule is not required, but a suggested guide to help you stay on track to complete the course within the 6-month enrollment period.

Module Outline

01 Course Introduction	
Estimated Module Time: 25 minutes	Completion Timeline Guide: Week 1
Module Sections:	
<ul style="list-style-type: none">• Section 1.1: Welcome and Introduction (6 minutes)• Section 1.2: Role, Functions, and Tasks of the Medical Director (14 minutes)	
02 Overview of Long-Term Care	
Estimated Module Time: 45 minutes	Completion Timeline Guide: Week 1
Module Sections:	
<ul style="list-style-type: none">• Section 2.1: Demographics and Why Long-Term Care (20 minutes)• Section 2.2: Payors and Industry Trends (9 minutes)• Section 2.3: Diagnosing and Treating Your Nursing Facility (11 minutes)	
03 Regulatory Environment	
Estimated Module Time: 150 minutes	Completion Timeline Guide: Week 2
Module Sections:	
<ul style="list-style-type: none">• Section 3.1: Laws and Regulations (29 minutes)• Section 3.2: Using Interpretive Guidance to Review and Write Policies (34 minutes)• Section 3.3: Surveys (32 minutes)• Section 3.4: Plan of Correction (7 minutes)• Section 3.5: Case Scenarios: Applying Concepts to Everyday Situations (43 minutes)	
04 Health Information Management	
Estimated Module Time: 210 minutes	Completion Timeline Guide: Week 3-4
Module Sections:	
<ul style="list-style-type: none">• Section 4.1: Provider Documentation (37 minutes)• Section 4.2: Provider Visits and Documentation: Best Practices (41 minutes)• Section 4.3: Audits (18 minutes)• Section 4.4: Privacy and Resident Rights (38 minutes)	

- Section 4.5: New Horizons of Privacy (11 minutes)
- Section 4.6: HITECH (8 minutes)
- Section 4.7: The Medical Director Role: Problem Solver (24 minutes)
- Section 4.8: In-depth Review of a Problem: Complaints About Laboratory Reporting (26 minutes)

05 Employee Health and Safety

Estimated Module Time: 75 minutes | Completion Timeline Guide: Week 5

Module Sections:

- Section 5.1: Why Should You Know About Employee Health? (11 minutes)
- Section 5.2: Occupational Illnesses (13 minutes)
- Section 5.3: Occupational Injuries (17 minutes)
- Section 5.4: Employee Stress and Environmental Risks (22 minutes)
- Section 5.5: Employee Health Programs (8 minutes)

06 Infection Control

Estimated Module Time: 125 minutes | Completion Timeline Guide: Week 6

Module Sections:

- Section 6.1: Infection Prevention and Control Program (IPC): Introduction (22 minutes)
- Section 6.2: Integrating IPC into the QAPI Program (14 minutes)
- Section 6.3: Essential Functions of an IPC Program (30 minutes)
- Section 6.4: Antibiotic Stewardship (38 minutes)
- Section 6.5: Care Transitions and IPC (17 minutes)

07 Resident Rights

Estimated Module Time: 45 minutes | Completion Timeline Guide: Week 6

Module Sections:

- Section 7.1: Introduction and Rules for Admission and Notifications (10 minutes)
- Section 7.2: Re-admission, Transfer and Discharge Rights (10 minutes)
- Section 7.3: Person-Centered Care (9 minutes)
- Section 7.4: Facility Responsibilities, Abuse and Neglect, and Promoting Resident Rights in Your Facility (14 minutes)

08 Financial Issues

Estimated Module Time: 90 minutes | Completion Timeline Guide: Week 7

Module Sections:

- Section 8.1: Medicare and Medicaid 101 (29 minutes)
- Section 8.2: Basic Accounting and Finance (18 minutes)
- Section 8.3: SNF Payment and Delivery Models (15 minutes)
- Section 8.4: Volume Enhancement (9 minutes)
- Section 8.5: Shifting Risk (13 minutes)

09 Governance

Estimated Module Time: 18 minutes | Completion Timeline Guide: Week 7

Module Sections:

- Section 9.1: Governance (18 minutes)

10 Committees

Estimated Module Time: 45 minutes | Completion Timeline Guide: Week 7

Module Sections:

- Section 10.1: Overview: Role and Value of Committees (19 minutes)
- Section 10.2: Important Committees within a Facility (9 minutes)
- Section 10.3: Efficient and Effective Committee Meetings (15 minutes)

11 Resident Assessment and Management

Estimated Module Time: 115 minutes | Completion Timeline Guide: Week 8

Module Sections:

- Section 11.1: Resident Assessment Instrument (RAI) and Minimum Data Set (MDS) (32 minutes)
- Section 11.2: RAI and Care Planning Section (20 minutes)
- Section 11.3: MDS and Reimbursement Section (24 minutes)
- Section 11.4: Quality (33 minutes)

12 Influencing Employee Behavior

Estimated Module Time: 50 minutes | Completion Timeline Guide: Week 8

Module Sections:

- Section 12.1: Employee Non-Performance: A Differential Diagnosis (39 minutes)
- Section 12.2: Managing the Medical Staff (10 minutes)

13 Health Care Delivery Systems

Estimated Module Time: 30 minutes | Completion Timeline Guide: Week 9

Module Sections:

- Section 13.1: Basic Concepts of Systems Theory (15 minutes)
- Section 13.2: Systems Theory and Care Delivery Processes in PALTC (13 minutes)

14 Transitions of Care

Estimated Module Time: 60 minutes | Completion Timeline Guide: Week 9

Module Sections:

- Section 14.1: Overview and Barriers to Effective Care Transitions (27 minutes)
- Section 14.2: Components of Better Care Transitions (21 minutes)
- Section 14.3: Recommendations and Available Tools (11 minutes)

15 Quality Management

Estimated Module Time: 70 minutes | Completion Timeline Guide: Week 9

Module Sections:

- Section 15.1: Introduction and Definitions (12 minutes)
- Section 15.2: Quality Assurance and Performance Improvement (QAPI) (11 minutes)
- Section 15.3: Data Analysis: Processes and Variation (17 minutes)
- Section 15.4: The Right Tool for the Right Job (16 minutes)
- Section 15.5: Putting it All Together (10 minutes)

16 Medical Director's Contract and Reporting Responsibilities

Estimated Module Time: 40 minutes | Completion Timeline Guide: Week 10

Module Sections:

- Section 16.1: The Medical Director's Report: Role and Purpose (16 minutes)
- Section 16.2: Essential Elements of The Medical Director's Contract (20 minutes)

17 Health Care Ethics

Estimated Module Time: 25 minutes | Completion Timeline Guide: Week 10

Module Sections:

- Section 17.1 Health Care Ethics (24 minutes)

18 Integration of Problem Solving and Systems Theory

Estimated Module Time: 55 minutes | Completion Timeline Guide: Week 10

Module Sections:

- Section 18.1: Key Systems and Stakeholders (30 minutes)
- Section 18.2: Identifying Problems: A Root Cause Analysis (22 minutes)

19 Risk Management

Estimated Module Time: 120 minutes | Completion Timeline Guide: Week 11

Module Sections:

- Section 19.1: Why Risk Management? (31 minutes)
- Section 19.2: Mitigating Risk (21 minutes)
- Section 19.3: Corporate Compliance (23 minutes)
- Section 19.4: Disaster Preparedness (14 minutes)
- Section 19.5: Employee Risk Management and Medical Director Liability (29 minutes)

20 Working with Families

Estimated Module Time: 40 minutes | Completion Timeline Guide: Week 12

Module Sections:

- Section 20.1: Family Systems and Behaviors (23 minutes)
- Section 20.2: The Family Meeting and Communicating Bad News (13 minutes)

21 Hospice/PACE/ACO

Estimated Module Time: 50 minutes | Completion Timeline Guide: Week 12

Module Sections:

- Section 21.1: Hospice (14 minutes)
- Section 21.2: Program of All-Inclusive Care for the Elderly (PACE) (7 minutes)
- Section 21.3: Accountable Care Organizations (ACOs) (26 minutes)

22 Medical Staff Oversight

Estimated Module Time: 40 minutes | Completion Timeline Guide: Week 12

Module Sections:

- Section 22.1: Medical Director's Oversight Responsibilities (F Tag 841) (14 minutes)
- Section 22.2: Medical Staff Models and Organizing the Medical Staff (23 minutes)

Course Learning Objectives

Goal

The goal of this comprehensive course is to create a framework for the leadership role of the medical director and to provide opportunities to hone skills and interact with peers.

Overall Learning Objectives

- Develop practical skills needed to fulfill the role and responsibilities of the medical director.
- Identify the unique aspects of the PALTC environment that impact the medical director's job.
- Describe the organizational responsibilities and dynamics of the medical director and the interdisciplinary team.
- Develop communication skills to deal with responsibilities for the interdisciplinary team, residents, and their families.
- Explain the resident care responsibilities of the medical director, including emergency care, quality management, family systems, and ethical considerations.
- Enhance leadership skills and team building towards a stronger role for the medical director with the interdisciplinary team.
- Develop human resource skills to deal with difficult situations and improve personal effectiveness in this area.
- Improve the medical director's ability to learn and practice in the evolving environment of health care delivery.
- Apply newly acquired knowledge to daily facility and practice activities.

Module Learning Objectives

01 Course Introduction

- Delineate the content, format and rationale of the Core Curriculum.
- Define roles, functions and tasks as they apply to medical direction.

02 Overview of Long-Term Care

- Discuss the history and evolution of systems of long-term care.
- Describe the concept of the continuum of care and identify key organizations that provide that care.
- Identify the levels of care provided and the differences between delivery sites.
- Match the needs of long-term patients with the appropriate level of care.
- Describe the influence of other factors in the LTC environment.
- Explain the effect of emerging trends and patterns on the roles and responsibilities of LTC professionals.
- Use your CMD skills to diagnose and treat your nursing facility.

03 Regulatory Environment

- Identify the areas of risk and search out federal and state regulations relevant to that risk when presented with a situation in LTC.
- Name the hierarchy of laws and regulations.
- Apply a regulation to a situation, taking into account its intent and interpretation.
- Use interpretive guidance to review facility policy and procedure and analyze whether the procedures are in compliance.
- Delineate the ways in which the medical director may assist the facility in complying with local, state, and federal regulations.

04 Health Information Management

- Analyze key processes in provider documentation
- Discuss elements of a medical record and how they are used.
- Analyze a system to identify if critical information is accessible and accurate based on primary source.
- Design a data indicator important to quality extracted from the medical record.
- Describe processes to extract data from the medical record.
- Describe legal and regulatory requirements, including HIPAA, that impact clinical documentation.
- Differentiate regulations around privacy versus security.
- Analyze a privacy concern in light of regulatory requirements and propose a solution.
- Explore data collection and analysis as components of problem solving.
- Develop a preliminary awareness of systems theory and its use in problem solving.
- Apply regulations promulgated under the HIPAA Privacy Rule to the use and disclosure of Protected Health Information.

05 Employee Health and Safety

- Manage the potential ethical and legal conflicts resulting from establishing a physician-patient relationship with an employee while having a fiduciary relationship with the facility.
- List important occupational illnesses and injuries seen in the LTC setting.
- Describe components and processes of an effective employee health program.
- Define the medical director's responsibilities in developing a successful facility employee health program.
- Assess the adequacy of the employee health and safety program at the participant's facility.

06 Infection Control

- Expand your role in the infection prevention and control program at your facility to assure compliance with current regulations.
- Work with teams and the leadership triad within the PALTC facility to develop, promote, and implement facility-wide systems.

07 Resident Rights

- Review basic categories of resident rights.
- Identify factors that may jeopardize the ability of residents to exercise their rights.
- Analyze resident scenarios that can violate resident rights.
- Discuss the prevention of and response to, resident abuse and neglect.
- Compare and contrast the role and tasks of the medical director to that of attending physicians in ensuring respect for resident rights.

08 Financial Issues

- Explain the differences between the sources of LTC funding.
- Communicate effectively with the administrator concerning the expense and revenue aspects of the facility budget.
- Define the nature of the medical director's functions and tasks relative to financial issues in LTC facilities.

09 Governance

- Describe relationships between medical directors and governing body, administrators and staff.
- Illustrate basic organizational arrangements.

10 Committees

- Define the role and functions of effective committees and committee members.
- Review committees that are likely to exist in the PALTC setting
- Define specific functions and tasks that the medical director can execute to enhance committee processes and outcomes.

11 Resident Assessment and Management

- Describe how RAI uses MDS data to guide care planning.
- Describe how the MDS is utilized as a reimbursement tool.
- Demonstrate how the MDS is utilized by CMS for monitoring quality.
- Recognize potential uses of MDS data for outcomes evaluations, research, and quality management.
- Describe how RAI uses MDS data to guide care planning.
- Describe how the MDS is utilized as a reimbursement tool.
- Demonstrate how the MDS is utilized by CMS for monitoring quality.

12 Influencing Employee Behavior

- Describe situations in which employees may not know why or what they should be doing.
- Explain why no positive consequences for the right thing could negatively influence employees' behaviors.
- Apply concept of Fournier's differential diagnosis to help correct negative behaviors.
- Discuss management in PALTC.

13 Health Care Delivery Systems

- Apply the basic concepts of systems theory to the medical care delivery processes in PALTC.
- Describe the training, typical roles and functions of IDT members.
- Optimize the contributions of the different members of the IDT care team.

14 Transitions of Care

- List key issues in individual transfers between sites of care.
- Discuss interventions and tools being developed to address key issues.
- Discuss the processes of care specific to the skilled facility interface in transitions of care.

15 Quality Management

- Describe the basic tenets of a quality improvement program in nursing homes.
- Explain the differences between quality assurance and quality improvement.
- Demonstrate various QAPI tools.
- Apply PDSA principles for quality improvement process.
- Recognize national initiatives for quality improvement in the nursing home, i.e. 5-star nursing home ratings.

16 Medical Director's Contract and Reporting Responsibilities

- Define the content and purpose of the medical director's report.
- Describe the elements and content of the medical director's contract.
- Ensure that all of the essential elements are in the medical director's contract.
- Discuss elements of risk management including liability insurance and anti-kickback provisions.

17 Health Care Ethics

- Review basic principles and concepts relevant to health care ethics.
- Identify and apply five key ethical principles to case studies.
- Delineate medical director role and responsibilities that impact facility-wide ethical/clinical decision-making.
- Define the medical director role on ethics committee.
- Discuss ethical considerations of research in vulnerable subjects/patients.

18 Integration of Problem Solving and Systems Theory

- Describe the process of problem solving.
- Apply systems theory and medical direction tools and skills to problem solving in PALTC settings.

19 Risk Management

- Identify key elements for an effective facility risk management program.
- Clarify the role of the medical director in prevention and response to high risk events.
- Define the key elements of a comprehensive corporate compliance program.
- Review the basic principles of disaster preparedness.

20 Working with Families

- Define basic concepts of family systems, including boundary, structure and culture.
- Relate chronic disease to patient, and family relationships and interactions.
- Identify common patterns of family behavior that arise in the PALTC setting.
- Discuss effective strategies to enhance physician communication with families.
- Employ appropriate strategies to deal with complex family situations.

21 Hospice/PACE/ACO

- Explain hospice eligibility.
- Describe hospice's role in care planning for nursing home residents enrolled in hospice.
- Delineate the different roles between the nursing home and hospice medical director for patients enrolled in hospice.
- Explain optimum elements in a hospice-nursing home contract.
- Explain how PACE fits into the continuum of LTC.
- Define the basic role of the PACE medical director.
- Review the governance of ACOs.
- Describe how ACOs can have a major financial impact upon nursing homes.
- Discuss the medical director's role in assisting nursing homes to market their product to hospital systems and/or to independent provider organizations.

22 Medical Staff Oversight

- Explain the rationale of why medical directors have oversight responsibilities.
- Discuss the two basic medical director responsibilities for oversight in PALTC facilities.
- Describe models of medical staff organization and oversight, including non-physician staff members.
- Delineate issues and develop strategies to address medical staff issues concerning roles, functions and tasks, including non-physician staff.
- Define responsibility in credentialing and privileging.

Online Core Credit Information

Credit Statements

Physician CME

AMDA – The Society for Post-Acute and Long-Term Care Medicine is accredited by the Accreditation Council for Continuing Medical Education (ACCME) to provide continuing medical education for physicians.

AMDA – The Society for Post-Acute and Long-Term Care Medicine designates this other activity (live webinar and eLearning) for a maximum of **29.0 AMA PRA Category 1 Credits™**. Physicians should only claim credit commensurate with the extent of their participation in the activity.

CMD Credit

This self-study activity has been pre-approved by the American Board of Post-Acute and Long-Term Care Medicine (ABPLM) for a total of **29.0 management hours** toward certification as a Certified Medical Director (CMD) in post-acute and long-term care medicine. The CMD program is administered by the ABPLM. Each physician should claim only those hours of credit actually spent on the activity.

ABPLM CMD Program

The Core Curriculum on Medical Direction in Long-Term Care, or its equivalent on long-term care management, is required for all Certified Medical Director (CMD) candidates. This course is the foundation for certification as an ABPLM CMD. Taking the course does not make you a CMD. There are other requirements to complete. For more information, follow this link or contact the American Board of Post-Acute and Long-Term Care Medicine (ABPLM) at 410-992-3117.

ABIM Maintenance of Certification (MOC)

Successful completion of this CME activity, which includes participation in the evaluation component, enables the participant to earn up to **29.0 Medical Knowledge MOC points and patient safety MOC credit** in the American Board of Internal Medicine's (ABIM) Maintenance of Certification (MOC) program. Participants will earn MOC points equivalent to the amount of CME credits claimed for the activity. It is the CME activity provider's responsibility to submit participant completion information to ACCME for the purpose of granting ABIM MOC credit.

ABFM Family Medicine Certification (formerly MC-FP)

This activity may be eligible to help meet ABFM Family Medicine Certification (formerly MC-FP) Requirements. Participants may self-report *AMA PRA Category 1 Credit(s)™* to meet Certification requirements via the Physician Portfolio on the ABFM website. All CME credits are subject to final approval by the ABFM.

Requirement for Author Disclosure

ACCME and the Society's policy requires everyone in a position to control the content of this educational activity to provide full disclosure of any affiliation or financial interest that is directly relevant to speaker's presentation(s). In addition, speakers are required to disclose when references to pharmaceuticals, medical devices, or other therapeutic products used in treatments are "off-label" (not approved by FDA for the use described). All relevant financial relationships have been identified, mitigated, and resolved.

The following AMDA Education Committee members have financial relationships to report:

- John Loome – Genesis HealthCare: Full Time Employee; Diane Sanders-Cepeda, DO, CMD – United Health Care: Full Time Employee; All others have no financial relationships to disclose.

The following Core faculty and planning committee members have financial relationships to report:

- Dheeraj Mahajan, MD, CMD – MatrixCare, Inc.: Executive Vice President and Chief Medical Officer; Meenakshi Patel, MD, CMD – Sun, Novartis, Lilly: Consultant; Sun, Lilly, Janssen, AZ: Speaker Bureau; Avanir, TauRX: Grant Research Support; Todd Sobol, MD, CMD – Optum Complex Care Management: Employee; Michael Wasserman, MD, CMD – Merck, Manual, Editorial Board: Honoraria; All others have no relationships to disclose.

AMDA staff have no financial relationships to disclose.

Faculty Forums

To provide an opportunity to interact with other course participants and members of the Core Curriculum Faculty, there will be live, monthly “Faculty Forums” available for participants to attend.

Each forum will be based on a topic area from the online modules, and the speakers will discuss course material and how it applies to situations medical directors face every day. Participants will also have an opportunity to ask questions during the live forum or can submit questions ahead of time.

The Faculty Forum is a required element to complete the Online Core.

2022 Forum Schedule

All forums are Tuesdays from 7-8 PM ET. To RSVP for a faculty forum, go to the “Faculty Forum” page in online course and select the RSVP link.

Regulations	Infection Control	Transitions of Care	Working with Families	Leadership	Ask the Expert
January 18	February 15	March 22	April 26	May 17	June 7
July 19	August 23	September 20	October 18	November 15	December 13

Core Synthesis

This weekend program comprised of dynamic lectures, interactive role plays, case-based discussion, and small group breakouts is the final step in completing the Core Curriculum on Medical Direction in Post-Acute and Long-Term Care course.

Emphasis is placed on the following areas:

- Implement the use of QAPI tools, problem solving concepts, and root cause analysis in monitoring and managing quality indicators and quality management data.
- Incorporate systems theory, systems management, and leadership skills into the daily work of the PALTC medical director.

Core Synthesis is offered multiple times per year in both in-person and virtual formats.

2022 Course Dates:

- July 22-24, 2022, San Antonio, TX
- November 18-20, 2022, Virtual Program

For more information on the Core Synthesis, including travel, lodging, and registration, please go to: <https://apex.paltc.org/page/core-curriculum-on-medical-direction>.