# Maternal Levels of Care Verification

## Verification Process    Guide

## 2025

Maternal Levels of Care Verification Process
What's New in 202 5

New or revised content for 2025 is identified by <u>underlined</u> text in the activities noted below.


<u>Changes effective January 1, 2025</u>

No changes for January 2025.

Maternal Levels of Care Ver

x   Your onsite verification visit agenda template, similar to the one presented later in this guide, will be posted to your

*ƒ* Patient discharge or transfer procedures and procedures guiding communication of health information,

# Verification Visit   Notification and Postponement Policies

### Notice of Initial   Verification On -site  Visit
If this is your program's first time through the verification process you will receive a thirty (30) day advance notice of your on-site visit date(s).  Notice will be provided via e-mail to the individuals identified on your account as the Primary Certification Contact and CEO.  Also thirty (30) days prior to your visit, the Notification of Scheduled Events section on your organization's extranet site, The Joint Commission Connect, is populated with the event along with a link to the reviewer's name, biographical sketch and photograph.

### Notice of Re -Verifica tion On -site  Visit
Your organization will receive notice from The Joint Commission seven (7) business days prior to the first day of the scheduled visit date(s) for Maternal Levels of Care re-verification. The notice will be emailed to the individuals identified on your account as the Primary Verification Contact and CEO and will include the specific verification visit date(s) and the program being assessed. Additionally, <u>once the reviewer arrives onsite</u> the Notification of Scheduled Events section on your organization's extranet site, The Joint Commission Connect, is populated with the event including a link to the reviewer's name, biographical sketch and photograph.

### Verification   Visit  Postponement Policy
The Joint Commission may not verify a program if the Organization does not allow The Joint Commission to conduct a verification visit.  In rare circumstances, it may be appropriate to request a review postponement.  An organization should direct a request for postponement to its Account Executive.  A request to postpone a verification visit may be granted if a major, unforeseen event has occurred that has totally or substantially disrupted operations, such as the following:

- x   A natural disaster or major disruption of service due to a facility failure
- x   The organization's involvement in an employment strike
- x   The organization's cessation of admitting or treating patients
- x   The organization's inability to treat and care for patients and its transference of patients to other facilities

The Joint Commission may, at its discretion, approve a request to postpone a review for an organization not meeting any of the criteria listed above.

Your organization's Verification Account Executive can answer questions about these policies, or put you in contact with other Joint Commission staff that can assist you.

Maternal Levels of Care Verification
# Orientation to the Program

Organization Participants
Program administrative and clinical leaders, perinatal program team members, others at the discretion of the program/organization

Materials Needed for Activities
- x  Organization chart, if available
- x  Perinatal care program organizational chart, if available
- x  Roster or sign-in sheet

Orientation to the Program    Description
This 60-minute activity is an exchange between the organization and reviewer about the perinatal (maternal) care program structure and scope of care, treatment, and services.  The reviewer will facilitate the discussion and use the information as a base to build on while continuing their program review in other activities.

Program representatives participating in this session should be able to discuss topics such as:
- x  Program philosophy (if aligned to organization's mission)
- x  Patient population and community demographics (e.g. age, ethnicity, primary languages spoken)
- x  Program framework for the clinically uncomplicated patient
- x  Program scope of care, treatment, and services
- x  Program leadership
- x  Community resources-availability, utilization, integration into the program, and assistance provided to patients; program role in perinatal education programs at the community level
- x  Use of clinical practice guidelines, evidence-based national guidelines, or up-to-date systematic review of existing evidence
- x  Safety and security risks associated with the environment of care
- x  Program-specific medication management processes
- x  Program-specific prevention and control of infections (e.g. reducing hospital-acquired infections, standardized post cesarean wound care protocol )
- x  Interdisciplinary team composition and responsibilities
- x  Other personnel and support services available to the interdisciplinary program team
- x  Backup systems and plans (e.g. to perform an emergency cesarean delivery, perform maternal resuscitation, and provide continuous labor support)
- x  Process for evaluating the program performance (e.g. identify what is being evaluated, who receives the evaluation data, who is identifying the need for improvement, what improvements have been made and why, who determines and sets the priorities for 1.663 0 T.04 1085.9

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f.　Patient transition from prenatal outpatient to inpatient, or from inpatient to home/discharge

3.　Reviewers will prioritize patients for tracer activity with the program team's assistance

x Speak with organization staff

Maternal Levels of Care Verification
# Education & Competence Assessment Process

The purpose of this activity is to discuss how the program meets the need for qualified and competent practitioners.

Organization Participants
- x Staff responsible for:
  - o Aspects of the organization's human resources processes, that support the program
  - o Orientation and education of perinatal staff
  - o Assessing perinatal staff competency
  - o Assessing perinatal licensed independent practitioner and other credentialed practitioner competency, when applicable

- x Individual(s) with authority to access information contained in personnel and, when applicable, credentials files

Materials Needed for this Activity
Personnel or credentials files for individuals identified by the reviewer
- x A minimum of five (5) files will be selected
- x At least one file per discipline (nurse, social work, dietician, therapist, etc.) represented on the perinatal care interdisciplinary team will be reviewed
- x Perinatal program nursing director

Note:  The reviewer will select these files based on the individuals encountered during tracer activity, that is, those caring for or who cared for the patient being traced.  Please let the reviewer know if there could be a delay in getting files for review.

Education and Competence Assessment Process Activity Description
During the session, the reviewer and organization representatives will:
- x Participate in a facilitated review of selected files for:
  - ƒ Relevant education, experience and training or certification
  - ƒ Current licensure
  - ƒ Orientation
  - ƒ Competence
  - ƒ Evidence reflecting completion of any required continuing education

- x Discuss the following competence assessment topics as related to verification of the maternal level of care designation:
  - ƒ How the program fits into any organization-wide competence assessment processes, if applicable
  - ƒ Hiring criteria unique to the program
  - ƒ Selection of perinatal care team members
  - ƒ Program-specific competence requirements
  - ƒ Processes for obtaining team member credentials information
  - ƒ Program-specific credentials evaluation criteria
  - ƒ Orientation content and training process for perinatal care program team

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# Medical Staff Credentialing and Privileging Process

The purpose of this activity is to learn how the perinatal (maternal) care program meets the needs for qualified and competent licensed independent practitioners.  Focus will be on program processes for defining credentialing and privileging criteria and applying the criteria in appointment and reappointment decisions and granting privileges, as well as ongoing monitoring of practitioner performance.

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Organization Participants
Individuals able to address issues related to credentials and competence requirements for perinatal care program licensed independent practitioners, for example:

- x   Medical director of the perinatal (matertivi,cn147 (l)2.5 .0 Tw ( )oTc 0 Tw 5.924 0 Td ( )Tj -0.002 .739 0 T

- ƒ On-going education, training and in-service requirements for the perinatal care program
- ƒ The program's process for monitoring the performance of all perinatal care licensed independent practitioners
- ƒ The program's process for evaluating performance of perinatal licensed independent practitioners who do not have current performance documentation at the organization

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# Issue Resolution

Issue resolution time is an opportunity for the reviewer to follow-up on potential findings that could not be resolved in other onsite activities.  If no issues need to be resolved, this session will be cancelled or used for another purpose.

Organization Participants
Will vary depending upon the issue

Materials Needed for this Activity
Will vary depending upon the issue

Preparation for Issue Resolution
None required

Issue Resolution   Description
The reviewer may have identified issues during individual tracer activity or other sessions that require further exploration or follow-up with staff.  This follow-up may include a variety of activities such as:

- x   Review of policies and procedures
- x   Review of human resources or credentials files
- x   Review of performance improvement data
- x   Discussions with selected staff

The reviewer will work with the program's verification review coordinator to organize and conduct all issue resolution activity.

# Reviewer Planning

The reviewer uses this time on a multi-day verification visit to review the day's observations and plan for upcoming activities.

Before leaving the organization, reviewers will return organization documents to the program's verification coordinator or liaison. If reviewers have not returned documentation, your organization is encouraged to ask the reviewer for the documents prior to their leaving for the day.

Organization Participants
None

Logistical Needs
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# Maternal Levels of Care Verification     - Information Request

Following is a list of items that reviewers

# Template Agenda  s

The Joint Commission
Maternal Levels of Care Verification Visit     Agenda
One Reviewer for One Day
Day 1

| Time | Activity & Topics | Suggested Organization Participants |
|---|---|---|
| 8:00-8:30 a.m. | **Opening Conference**<br>- Introductions<br>- Brief review of agenda | - Program's Joint Commission contact<br>- Program clinical and administrative leadership<br>- Others at program's discretion |
| 8:30-9:30 a.m. | **Orientation to Program**<br>Topics to be covered include:<br>- Program scope of  care, treatment, and services<br>- Program philosophy<br>- Patient population and community demographics<br>- Program leadership, responsibilities, and accountabilities<br>- Interdisciplinary team composition and responsibilities<br>- Other personnel and support services<br>- Backup systems and plans in place<br>- Program and organization integration, interaction and collaboration<br>- Communication and collaboration within the program, and with patients and families<br>- Program team member selection qualifications, orientation, training, ongoing education and support<br>- Clinical practices (evidence-based national guidelines or up-to-date systematic review of existing evidence) being followed by the program<br>- Early risk identification and managing the risk corresponding to the program's capabilities<br><br>Q & A Discussion | |
| 9:30-10:00 a.m. | **Reviewer  Planning & Protocol Review Session**<br>Please have the following information available for the Reviewer Planning Session:<br>x   A current list of patients in the program<br>x   Performance improvement action plans<br>x   Order sets, care plans, as applicable<br>x   Program's schedule for interdisciplinary team meetings or program rounds on patients<br>x   Program's back-up schedule for perinatal services needed to meet the needs of the mother | Program representative(s) who can facilitate patient selection and tracer activity |
| 10:00 -12:00 p.m. | **Individual Tracer Activity**<br>Tracer activity begins where the patient is currently receiving care, treatment and services<br><br>x   Begins with interactive review of patient record(s) with staff actively working with the patient—the patient's course of care, treatment and services from prenatal up to the present and anticipated for the future (postpartum care) will be mapped<br>x   Continues with tracing the patient's path, visiting different areas, speaking with program team members and other organization staff caring for or encountered by the patient. | - Program team members and other staff who have been involved in the patient's care, treatment or services<br><br>- Program team members who can facilitate tracer activity including escorting the reviewers through the clinical setting following the |

Maternal Levels of Care Verification Visit     Agenda
One Reviewer for Two Days
Day 1

| Time | Activity & Topics | Suggested Organization Participants |
|---|---|---|
| 8:00-8:30 a.m. | **Opening Conference**<br>- Introductions<br>- Brief review of agenda | - Program's Joint Commission contact<br>- Program clinical and administrative leadership<br>- Others at program's discretion |
| 8:30-9:30 a.m. | **Orientation to Program**<br>Topics to be covered include:<br>- Program scope of care, treatment, and services<br>- Program philosophy<br>- Patient population and community demographics<br>- Program leadership, responsibilities, and accountabilities<br>- Interdisciplinary team composition and responsibilities<br>- Other personnel and support services<br>- Backup systems and plans in place<br>- Program and organization integration, interaction and collaboration<br>- Communication and collaboration within the program, and with patients and families<br>- Program team member selection qualifications, orientation, training, ongoing education and support<br>- Clinical practices (evidence-based national guidelines or up-to-date systematic review of existing evidence) being followed by the program<br>- Early risk identification and managing the risk corresponding to the program's capabilities<br><br>Q & A Discussion | |
| 9:30-10:00 a.m. | **Reviewer Planning & Protocol Review Session**<br>Please have the following information available for the Reviewer Planning Session:<br>x A current list of patients in the program<br>x Performance improvement action plans<br>x Oa o 1 2 . 7 ( o n ) ] T | |

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