



COLLEGE of AMERICAN  
PATHOLOGISTS

## *Admin-Related Work That Colleagues Assumed I Would Know*

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Practice Management Community of Practice

Moderator: Richard Owings MD, FCAP

Subject Matter Experts: Patrick Wilson MD, FCAP and Juanita J Evans MD, FCAP

October 22, 2019

1:00 PM CDT

# Introduction



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Richard Owings, MD

# Agenda

- Objectives
- Overview and Summary
- Group Discussion
- Wrap Up: Conclusion & Next Steps

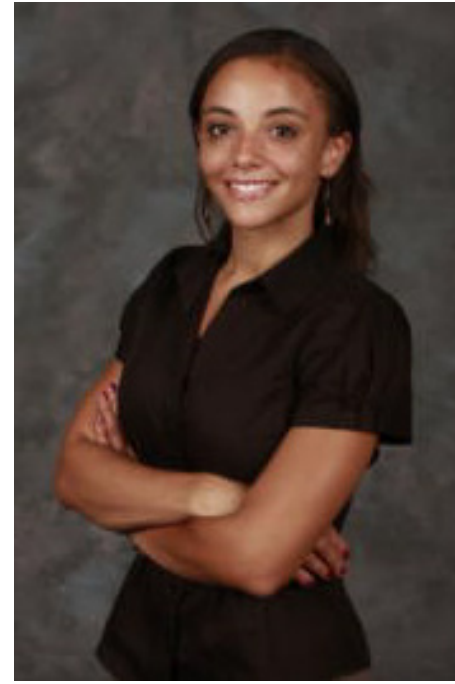
# Disclaimer

Nothing in this discussion should be construed as legal, billing or accounting advice. Such advice should only come from your legal and financial professionals.

# Presenters



Patrick Wilson, MD



Juanita Evans, MD

# Overview

- Most Pathology training programs place great emphasis on “hands-on” Anatomic Pathology skill development
- Postgraduate training rarely includes more than just a cursory overview of laboratory administration
- For many new in practice pathologists, direct oversight of at least some laboratory operations will be assigned before the first photon passes through the microscope lens
- Defining responsibilities, acquiring the necessary skill sets and forging administrative relationships is daunting, to say the least
- This discussion provides a brief overview of the initial steps on a journey to effective leadership

# Objectives

- Discuss ways on how to get to know the key players in the laboratory space
- The importance of taking on a team approach to problems
- Tips on how to be proactive in gaining the particular administrative skillsets you may need

# Congratulations!

- You have been assigned medical oversight of a specific area of laboratory operations. Now what?
  - I never did this in training...
  - Am I qualified????
  - Where do I begin????



# CLIA Shock and Awe

- “As the laboratory Director, you are responsible for the overall operation and administration of the laboratory, including the employment of competent qualified personnel. Even though you have the option to delegate some of your responsibilities, you remain ultimately responsible and must ensure that all duties are properly performed and all applicable CLIA regulations are met.”

# Laboratory Director Responsibilities

- Testing systems provide quality services to include preanalytic, analytic and post analytic phases of testing
- Physical and environmental conditions are adequate and appropriate
- Employees are safe from physical, chemical and biological hazards
- A general supervisor is available to provide day-to-day supervision of all testing personnel and reporting of test results
- Sufficient personnel with appropriate education and training employed by the laboratory
- Review of all test procedures
- Each employee's duties are specified in writing

# Laboratory Medical Director Responsibilities

- Appropriate test method selection and validation
- Enrollment in a proficiency testing program to be performed in accordance with CLIA guidelines
- Establish a quality assessment and quality control program
- Personnel competency (policies, procedures, documentation)
- Ensure procedure manual is readily available to all personnel

# First Steps

- Review applicable policies and procedures
- Review CAP Checklist Activity Menu
- Review quality assessment procedures
- Engage Laboratory Staff
- Engage key providers
- Become identified as the “go to” person for your section
- Embrace the role

# First Steps - The How To

- Review
  - Ask questions of your lead staff
    - Know the make up of your lab or section of responsibility
      - Volumes of testing, instrumentation in the lab, # of employees, etc.
      - Understand what you have delegated
  - Give yourself a reasonable timeline with digestible mini-goals to look over the likely 100s of policies and procedures
- Engage
  - Meet and greet with EVERYONE in the lab on as many shifts as you can
  - Get familiar with the administrative structure of your lab and the hospital
  - Attend monthly meetings or make your own with hospital admin

# Ongoing Engagement

- Regularly review quality control PT
  - Ensure that problems are corrected in a timely fashion and that corrective action taken is monitored for ongoing effectiveness.
- Learn about equipment and test systems in use in your laboratory.
- Engage techs to teach you about the instrumentation they use and perceived benefits and issues
  - Be aware of issues regarding IT, maintenance, downtime etc.
  - Ensure applicability to your patient population
- Engage providers outside of the laboratory.
- Be customer focused
  - With each small problem that arises, look for ways to improve the system

# Summary

## Embrace the Role:

- Remember your goals: “To be known as a helpful advocate for quality testing and employee and patient safety” - Dr. Rothrock
  - Be available
  - Have a team approach mindset to quality activities
  - Be proactive
  - Consider keeping a log of issues with solutions, lab accomplishments
- If you know this type of leadership role is coming up soon
  - Volunteer for hospital committees
  - Volunteer for CAP inspections
  - Participate in educational activities like compliance webinars, AP3s, etc.

# Group Discussion

- Time for your thoughts, questions, and suggestions
- Type in the Q&A area at right



# Conclusion and Next Steps

- Please provide feedback on our survey
  - What other topics are of interest?
  - Would you be interested in being a moderator or subject matter expert? Contact Jackie Glanton at [jglanto@cap.org](mailto:jglanto@cap.org)
- Follow-up email after this roundtable to the entire community that will include links to related resources, content, and this recording

## Practice Management Community of Practice

### Next Session

**SAVE THE DATE: December 12, 2019, 11:00 AM (CDT)**

**Topic: Financial Refresher**

# Practice Management Programs

- Practice Managers Forum –  
[Click here to apply](#)
- Practice Management Workshop –  
[Click here to register](#) or  
contact Jackie Glanton at [jglanto@cap.org](mailto:jglanto@cap.org)
- 10-Hour Practice Assessments –  
contact Anthony Battistone at [abattis@cap.org](mailto:abattis@cap.org)



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