VRC Director Work Flow

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Logging in

To begin work flow, login using your username and password. The application is located at https://client.providersource.com/portal.
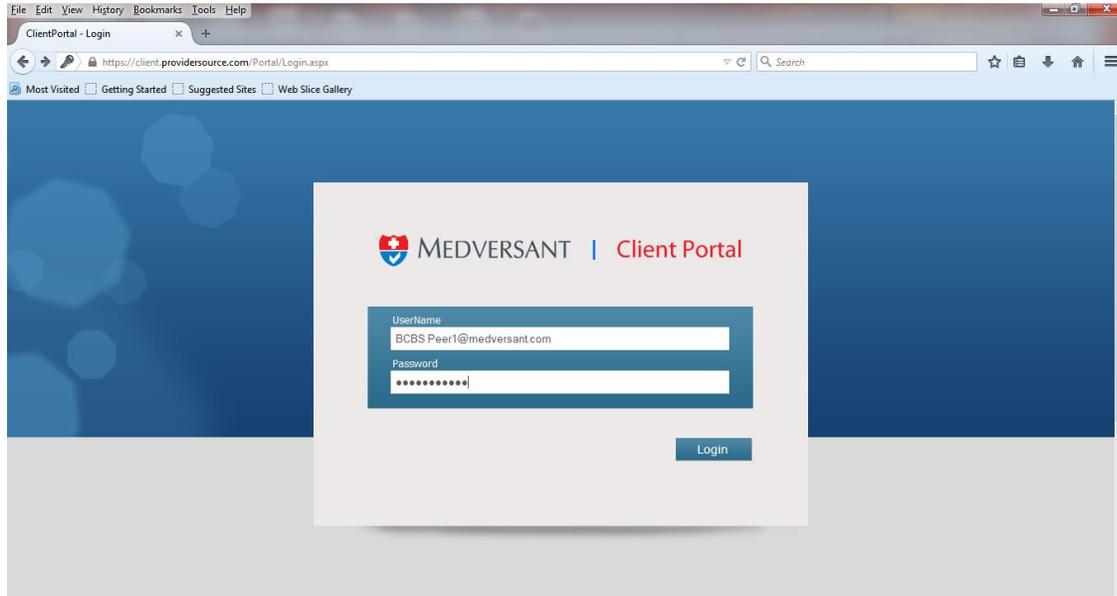
Director Role

The director role has the responsibility of submitting final recommendations on all providers in VRC. The director role has as well all the privileges of both the Scheduler and Peer roles and can perform the same tasks, except any approval or denial is final. Login for the Director is the same as for Peer or Scheduler roles with landing screen after login being the "Work Tickler".

Using the Interface

The Director will select the "Work Tickler" item from the menu bar to vote on records as shown below.
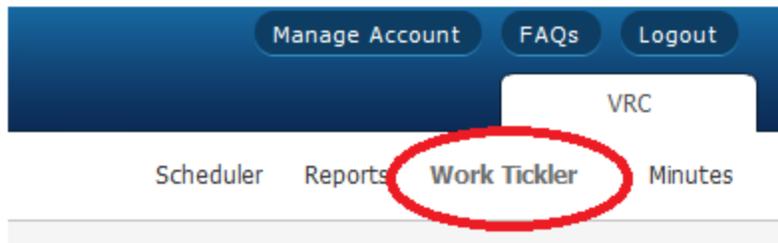
Next, the user will select the tab for that day's committee. In the screenshot below (item 1), the Scheduler has already set up records for both the 11/28/2018 and the 11/30/2018 committee. To filter down the records to just a single day, the user should select that day's committee. Clicking on the 11/28/2018 tab will automatically filter out any records from any other committee.

In the case of a Director, who may have both an Exceptions and a Review and Discuss committee on the same day, after clicking the 11/28/2018 tab, they should select the proper level from the "Review Level" tab as shown in item 2 (Qualifies, Review and Discuss, or Exceptions) and then select "Search" (item 3). This will filter the committee down to just the necessary records for that committee.
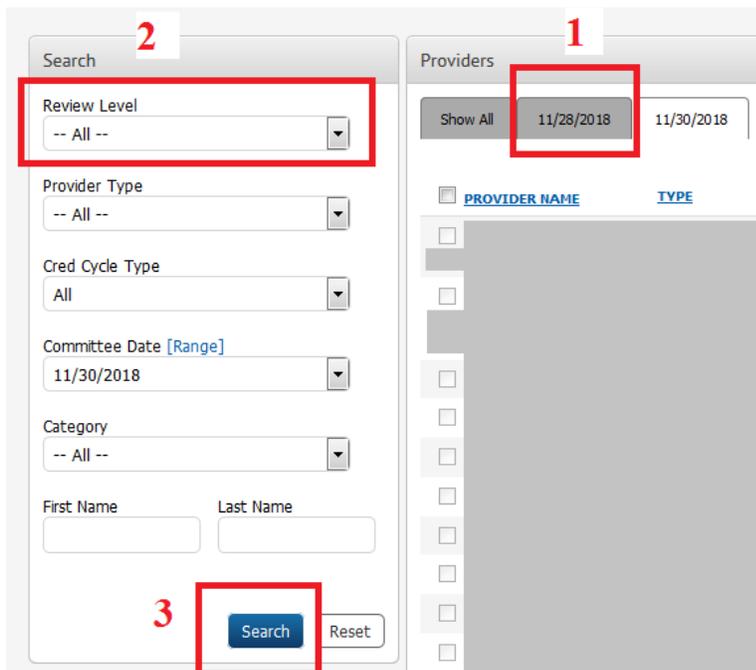
The work flow for the director role is defined by three different paths:

1. The director will approve all providers with a status "Qualifies" without peer review prior to assigning "Final Approval". The director should review each provider profile prior to approval to ensure the appropriate assignation has been applied. Provider profile review would follow the same flow as for Peers, except to save time, the Director should click the "Back to Search" button after review is complete rather than submit a recommendation on each individual provider. The Director can approve on mass all providers by clicking on each check box next to a provider (highlighted in red below) to be approved, then clicking the "Submit" button (highlighted in green).

The Director would then select "Final Approval" from the drop down menu (highlighted in green below), input a note if desired in the text box (highlighted in blue), attach a .jpg picture of their signature if one is not already saved in the application (if a button labeled "Browse" is available in the highlighted area in yellow, a signature .jpg needs to be uploaded otherwise one is already available), then click the "Save" button (highlighted in red).
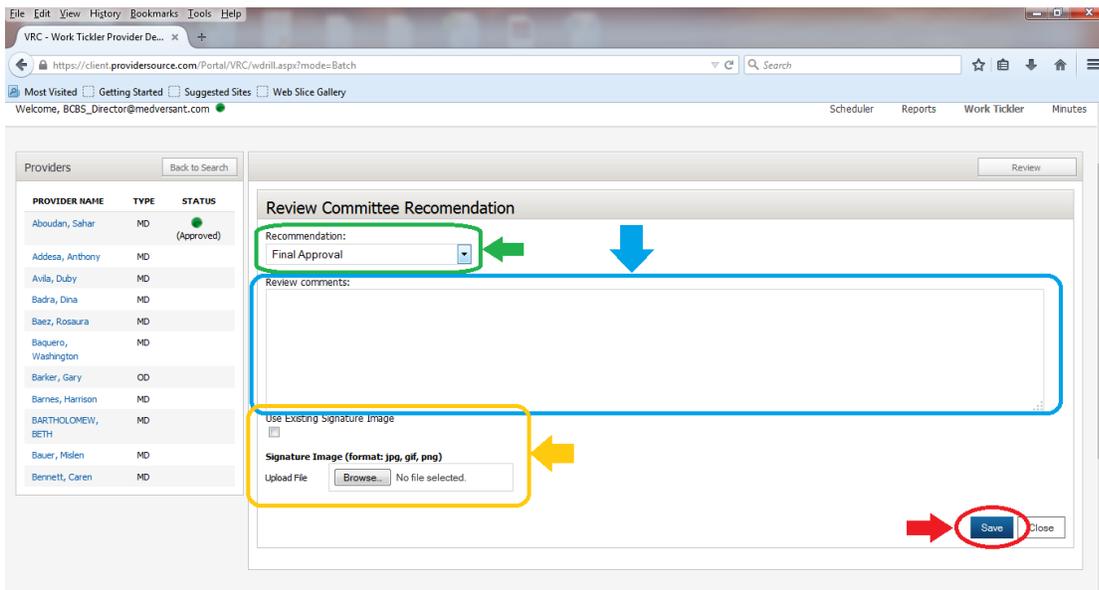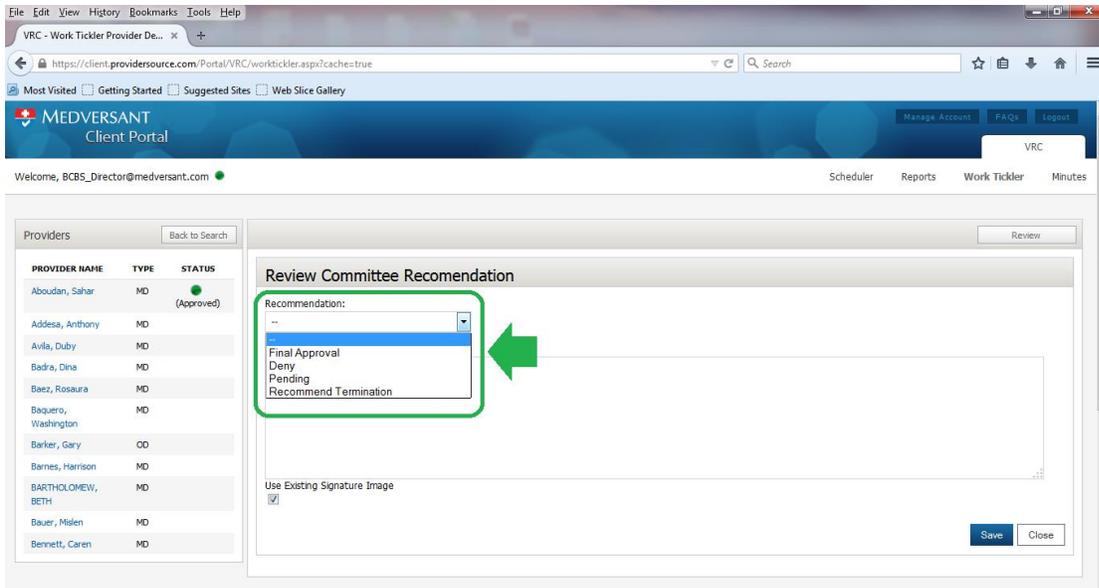
2. The Director is also responsible for reviewing and potentially denying all providers with a status of "Exception". The director would follow the same flow as for approvals on providers with "Qualifies" status, except they would select the "Deny" option for Credentialing applications or "Recommend Termination" for Recredentialing in the "Recommendation" drop down in the "Review Committee Recommendation" window.

3. The director has final say on all Peer recommendations. The Director would follow the provider profile review process as documented in the VRC Peer Work Flow document and make their recommendation which can include overriding any Peer recommendations.