| **Time** | **Activity** | **Organization Participants** |
| --- | --- | --- |
| 45 minutes starting at 8:00 a.m. | **Opening Conference** * Introductions
* Joint Commission & Certification overview
* Slide presentation
* President’s video
* Agenda review
* Site selection

**Multi-Site Staffing Firm Overview** * Organizational structure
* Customer base
* Review and discuss information provided on certification application
 | Certification review coordinatorLeader(s) Others at the discretion of the organization  |
| 30 minutes | **Reviewer Planning Session**The firm is asked to have available:1. A roster of clinical staff that is currently on assignment or available for assignment, sorted by discipline for each of its sites.
2. A list of customers where clinical staff is currently working or has worked in the past 12 months. **NOTE:** If each site works with a separate and unique group of customers, the firm is asked to have a customer list available for each of its sites.
 | Certification review coordinatorStaff familiar with sites and that can orient the reviewer to the roster or list(s)Staff familiar with customers and contracts that can orient the reviewer to the list(s) |
| 60 minutes | **Orientation to Staffing Firm and Data Use**Business Functions* Management and operations
* Centralized and decentralized systems and processes
* On-call structure, if applicable
* Marketing activities
* Emergency management
* Information management
* Cyber security and protection systems
* Code of business ethics

Customer/Client Functions* Contracting/formal agreement processes
* MSPs and vendor management
* Subcontracting
* Conflict of interest policies
* Customer reassignment of clinical staff (floating)
* Tracking and fulfillment of customer/client staff requirements

Staffing Functions* Performance of recruitment, retention, and competency evaluation processes
* Clinical staff performance evaluation processes
* Setting clinical staff health requirements
* Expectations regarding National Patient Safety Goals

Data Use* Approach to performance improvement
* Centralized or decentralized
* Data collection processes
* Data quality and maintaining integrity
* Data analysis processes
* Priorities for improvement
* Organization-wide and/or site-specific
* Certification standardized performance measures
* Customer satisfaction data
* Clinical staff satisfaction data
* Customer complaint reporting
* Clinical staff complaints, exit interview data
 | Leader(s) Staff responsible for these functionsOthers at the discretion of the organization |
| 45 minutes | **Multi-Site Monitoring and Oversight System Tracer**Review systems for monitoring and oversight including:* Frequency of monitoring and oversight
* Criteria and performance expectations for sites
* Individuals responsible for monitoring and oversight
* Data gathered and used to monitor site performance
* Procedures and tools for overseeing sites
* Procedures for providing performance feedback to sites
* Requirements and timeframes for site corrective action
 | Staff responsible for site monitoring and oversightLeader(s) Others at the discretion of the organization |
| 30 minutes | **Review of Firm’s Uploaded Documents** |
| 30 minutes | **Reviewer Lunch** |
| 60 minutes | **Contract/Formal Agreement Process*** Centralized or decentralized
* Review of contracting or formal agreement process
* Facilitated review of a select sample of contracts and formal agreements
 | Individual(s) familiar with content and responsible for formal agreements/ contracts |
| 60 minutes | **Competence Assessment & Credentialing Process** * Centralized or decentralized processes
* Recruitment
* Application process
* Employment history checks
* Credentials verification process
* Hiring criteria/decision
* Orientation/assignment availability
* Health status requirements
* Placement criteria
* Clinical staff to customer matching process
* Clinical staff supervision
* Customer reassignment of clinical staff (floating)
* Clinical staff performance evaluation, including customer feedback
* Maintaining competency of clinical staff
 | Individuals responsible for designing, managing, and overseeing the performance of these processes at sites |
| 60 minutes | **Issue Resolution and Reviewer Report Preparation** | Individual coordinating review activity |
| 30 minutes | **Reviewer Planning for Site Review Activity** | Individual coordinating review activity |
| 30 minutes, ending at approximately 4:30 p.m. | **Multi-Site Review Interim Exit Conference** | Leader(s)and others at the discretion of the organization |

**Agenda for Multi-Site (Corporate) Review Days beyond Day 1**

| **Time** | **Activity** | **Organization Participants** |
| --- | --- | --- |
| 180 minutes (3 hours) starting at 8:00 a.m. | **Site (Branch Office) Review** (times are approximate)Video meeting with site staff (45-60 minutes) includes:*Clinical Staff Tracer** First contact (recruitment)
* Data gathering (application process)
* Discussion related to file review
	+ Licensure
	+ Credentials
	+ Competency
	+ Continuing education
	+ Orientation
	+ Health status
* Hiring decision
* Orientation/assignment availability
* First placement
	+ How data is provided to customer
	+ Clinical staff to customer matching process
	+ Customer reassignment of clinical staff (floating)
	+ Registering concerns/complaints
	+ Performance evaluation process

 *Site Support System Tracer** Site leadership structure
* Site placement within multi-site organization structure
* Systems to support sites
* Site responsibilities and accountabilities
* Centralized and decentralized processes
* Communication between corporate organization and site
* Data reporting between corporate organization and site
* Organization-wide performance improvement

*Clinical staff personnel file review* (90-120 minutes) | Site staff including:* Site manager
* Staffing coordinator(s)
* Supervisory staff
* Staff responsible for collecting and verifying application data
* Others at the discretion of the site manager
 |
| 30 minutes | **Reviewer Lunch** |
| 180 minutes (3 hours)starting at mutually agreed upon time | **Site (Branch Office) Review** (times are approximate)Repeat of above activity with another office |  |
| 30 minutes | **Issue Resolution** | Certification review coordinator, if requested by reviewer |
| 60 minutes | **Reviewer Report Preparation** |  |
| 30 minutes ending at approximately 4:30 | **Reviewer Planning, or Interim Exit, or Multi-Site Review Exit Conference** | Per reviewer recommendation |