| **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 coordinator  Leader(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 coordinator  Staff 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 functions  Others 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 oversight  Leader(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 |