

Health Care Staffing Services Certification Multi-Day – Review Agenda

First Day

| Time | Activity | Organization Participants |
|----------------------------------|---|---|
| 40 minutes starting at 8:00 a.m. | Opening Conference <ul style="list-style-type: none"> - Introductions - Joint Commission & Certification overview <ul style="list-style-type: none"> ▪ Slide presentation ▪ President's video - Agenda review Staffing Firm Overview <ul style="list-style-type: none"> - Organizational structure - Customer base - Review and discuss information provided on certification application | Certification review coordinator Leader(s) Others at the discretion of the organization |
| 20 minutes | Reviewer Planning Session <p><i>Please note: The reviewer needs a list of customers where clinical staff are currently working or have worked.</i></p> <ul style="list-style-type: none"> - Reviewer selection of contracts/agreements for review—A minimum of six contracts/ agreements will be identified per day for review. <ul style="list-style-type: none"> ▪ Selected contracts/agreements need to be available for the Contract/Formal Agreement Review activity <p><i>Please Note: The reviewer needs a roster of clinical staff that are currently placed or available for placement, sorted by discipline.</i></p> <ul style="list-style-type: none"> - Reviewer selection of clinical staff records and tracers--A minimum of 20 clinical staff will be identified per day for review. <ul style="list-style-type: none"> ▪ Files for these individuals need to be available for the Personnel File Review activity | Certification review coordinator (at the reviewer's request) |
| 60 minutes | Orientation to Staffing Firm <u>and Data Use</u> <p><u>Business Functions</u></p> <ul style="list-style-type: none"> - Management and operations - On-call structure, if applicable - Marketing activities - Emergency management - Information management <ul style="list-style-type: none"> ▪ Cyber security and protection systems - <u>Code of business ethics</u> | Leader(s) Individual(s) responsible for these functions |

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| Time | Activity | Organization Participants |
|------------|--|---|
| | <p><u>Customer/Client Functions</u></p> <ul style="list-style-type: none"> - Contracting/formal agreement processes <ul style="list-style-type: none"> ▪ MSPs and vendor management ▪ Subcontracting - Conflict of interest policies - Customer reassignment of clinical staff (floating) - Tracking and fulfillment of customer/client staff requirements <p><u>Staffing Functions</u></p> <ul style="list-style-type: none"> - Performance of recruitment, retention, and competency evaluation processes - Clinical staff performance evaluation processes - Setting clinical staff health requirements - Expectations regarding National Patient Safety Goals <p><u>Data Use</u></p> <ul style="list-style-type: none"> - Approach to performance improvement <ul style="list-style-type: none"> ▪ Data collection processes ▪ Data quality and maintaining integrity ▪ Data analysis processes - Priorities for improvement <ul style="list-style-type: none"> ▪ Certification standardized performance measures ▪ <u>Customer satisfaction data</u> ▪ <u>Clinical staff satisfaction data</u> ▪ <u>Customer complaint reporting</u> ▪ <u>Clinical staff complaints, exit interview data</u> | |
| 30 minutes | <u>Review of Firm's Uploaded Documents</u> | |
| 30 minutes | <p>Contract/Formal Agreement Review</p> <ul style="list-style-type: none"> - Discussion of contracting/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 | <p>Competency Assessment & Credentialing Session</p> <ul style="list-style-type: none"> - 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 | Individuals responsible for managing and performing these processes |

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| | <ul style="list-style-type: none"> - Clinical staff performance evaluation, including customer feedback - Maintaining competency of clinical staff | |
| 30 minutes | Reviewer Lunch | |
| 120 minutes | Personnel File Review <ul style="list-style-type: none"> - Facilitated review of the selected sample of files begins in this activity - Discussion during this activity will focus on the firm's internal credentials quality assurance audit process including <ul style="list-style-type: none"> ▪ Reporting audit results ▪ Compiling and analyzing the audit data for trends ▪ Identifying opportunities to improve the credentialing process ▪ Planned improvements or changes already implemented to the credentialing process ▪ Efforts to maintain and sustain improved performance | <p>Individual(s) with authorized access to files</p> <p>Individual(s) who can facilitate the file review</p> <p>Individual(s) that performs credentials audits for the firm</p> |
| 60 minutes | Individual Clinical Staff Tracers <ul style="list-style-type: none"> - First contact (recruitment) - Data gathering (application process) - Discussion related to file review <ul style="list-style-type: none"> ▪ Licensure ▪ Credentials ▪ Competency ▪ Continuing education ▪ Orientation ▪ Health status - Hiring decision - Orientation/assignment availability - First placement <ul style="list-style-type: none"> ▪ How data is provided to customer ▪ Clinical staff to customer matching process ▪ Customer reassignment of clinical staff (floating) ▪ Registering concerns/complaints - Performance evaluation process | <p>Individual(s) who can step the reviewer through a clinical staff person's experience with the firm from point of first contact through recruitment, hiring, orientation and first placement, through initial performance evaluation</p> <p>Should involve individuals responsible for the day-to-day performance of activities</p> |
| 30 minutes ending at approximately 4:30 p.m. | Reviewer Planning | Certification review coordinator |

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Last Day

| Time | Activity | Organization Participants |
|--|--|--|
| 90 minutes starting at 8:00 a.m. | Personnel File Review ...continued | |
| 60 minutes | Contract/Formal Agreement Review <ul style="list-style-type: none"> - Facilitated review of a select sample of contracts and formal agreements | Individual(s) familiar with content and responsible for formal agreements/contracts |
| 60-120 minutes | Individual Clinical Staff Tracers <ul style="list-style-type: none"> - First contact (recruitment) - Data gathering (application process) - Discussion related to file review <ul style="list-style-type: none"> ▪ Licensure ▪ Credentials ▪ Competency ▪ Continuing education ▪ Orientation ▪ Health status - Hiring decision - Orientation/assignment availability - First placement <ul style="list-style-type: none"> ▪ How data is provided to customer ▪ Clinical staff to customer matching process ▪ Customer reassignment of clinical staff (floating) ▪ Registering concerns/complaints - Performance evaluation process | <p>Individual(s) who can step the reviewer through a clinical staff person's experience with the firm from point of first contact through recruitment, hiring, orientation and first placement, through initial performance evaluation</p> <p>Should involve individuals responsible for the day-to-day performance of activities; if possible, a different group of internal staff should be accessed</p> |
| 30 minutes | Reviewer Lunch | |
| 120 minutes | Personnel File Review ...continued Note: Reviewers may conduct additional Clinical Staff Tracers if time is available. | |
| 60 minutes | Issue Resolution & Reviewer Report Preparation | Certification review coordinator, if requested |
| 30 minutes ending at approximately 4:30 p.m. | Organization Exit Conference | <p>Program and clinical leadership</p> <p>Others at the discretion of the organization</p> |

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Multi-Day Review Agenda for all days between the First and Last

| Time | Activity | Organization Participants |
|---|--|--|
| 150 minutes (2.5 hours) starting at 8:00 a.m. | Personnel File Review ...continued Note: Reviewers may conduct additional Clinical Staff Tracers if time is available. | |
| 60 minutes | Contract/Formal Agreement Review <ul style="list-style-type: none"> - Discussion of contracting/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 |
| 30 minutes | Reviewer Lunch | |
| 60 minutes | Individual Clinical Staff Tracers <ul style="list-style-type: none"> - First contact (recruitment) - Data gathering (application process) - Discussion related to file review <ul style="list-style-type: none"> ▪ Licensure ▪ Credentials ▪ Competency ▪ Continuing education ▪ Orientation ▪ Health status - Hiring decision - Orientation/Assignment Availability - First placement <ul style="list-style-type: none"> ▪ How data is provided to customer ▪ Clinical staff to customer matching process ▪ Customer reassignment of clinical staff (floating) ▪ Registering concerns/complaints - Performance evaluation process | Individual(s) who can step the reviewer through a clinical staff person's experience with the firm from point of first contact through recruitment, hiring, orientation and first placement, through initial performance evaluation Should involve individuals responsible for the day-to-day performance of activities; of possible, a different group of internal staff should be accessed each day |
| 150 minutes (2.5 hours) | Personnel File Review ...continued Note: Reviewers may conduct additional Clinical Staff Tracers if time is available. | |
| 30 minutes ending at approximately 4:30 p.m. | Reviewer Planning | As requested by the reviewer |

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