

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 - Introductions - Joint Commission & Certification overview ▪ Slide presentation ▪ President's video - Agenda review 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
20 minutes	Reviewer Planning Session <i>Please note: The reviewer needs a list of customers where clinical staff are currently working or have worked.</i> - Reviewer selection of contracts/agreements for review—A minimum of six contracts/ agreements will be identified per day for review. ▪ Selected contracts/agreements need to be available for the Contract/Formal Agreement Review activity <i>Please Note: The reviewer needs a roster of clinical staff that are currently placed or available for placement, sorted by discipline.</i> - Reviewer selection of clinical staff records and tracers--A minimum of 20 clinical staff will be identified per day for review. ▪ 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> <u>Business Functions</u> - Management and operations - On-call structure, if applicable - Marketing activities - Emergency management - Information management ▪ Cyber security and protection systems - <u>Code of business ethics</u>	Leader(s) Individual(s) responsible for these functions

Disclaimer: Recording or transcribing this review is strictly prohibited, including the recording and transcribing that can occur with video conference applications. Discovery of any recording activities will result in the immediate cessation of the review and denial of certification.

Time	Activity	Organization Participants
	<u>Customer/Client Functions</u> - 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 <u>Staffing Functions</u> - Performance of recruitment, retention, and competency evaluation processes - Clinical staff performance evaluation processes - Setting clinical staff health requirements - Expectations regarding National Patient Safety Goals <u>Data Use</u> - Approach to performance improvement ▪ Data collection processes ▪ Data quality and maintaining integrity ▪ Data analysis processes - Priorities for improvement ▪ 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	Contract/Formal Agreement Review - 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	Competency Assessment & Credentialing Session - 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

Disclaimer: Recording or transcribing this review is strictly prohibited, including the recording and transcribing that can occur with video conference applications. Discovery of any recording activities will result in the immediate cessation of the review and denial of certification.

Time	Activity	Organization Participants
	- Clinical staff performance evaluation, including customer feedback - Maintaining competency of clinical staff	
30 minutes	Reviewer Lunch	
120 minutes	Personnel File Review - 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 ▪ 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	Individual(s) with authorized access to files Individual(s) who can facilitate the file review Individual(s) that performs credentials audits for the firm
60 minutes	Individual Clinical Staff Tracers - 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	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
30 minutes ending at approximately 4:30 p.m.	Reviewer Planning	Certification review coordinator

Disclaimer: Recording or transcribing this review is strictly prohibited, including the recording and transcribing that can occur with video conference applications. Discovery of any recording activities will result in the immediate cessation of the review and denial of certification.

Last Day

Time	Activity	Organization Participants
90 minutes starting at 8:00 a.m.	Personnel File Review ...continued	
60 minutes	Contract/Formal Agreement Review - 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 - 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	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; if possible, a different group of internal staff should be accessed
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	Program and clinical leadership Others at the discretion of the organization

Disclaimer: Recording or transcribing this review is strictly prohibited, including the recording and transcribing that can occur with video conference applications. Discovery of any recording activities will result in the immediate cessation of the review and denial of certification.

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 - 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 - 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	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

Disclaimer: Recording or transcribing this review is strictly prohibited, including the recording and transcribing that can occur with video conference applications. Discovery of any recording activities will result in the immediate cessation of the review and denial of certification.