

Preparation Guidelines for Offsite Review Process

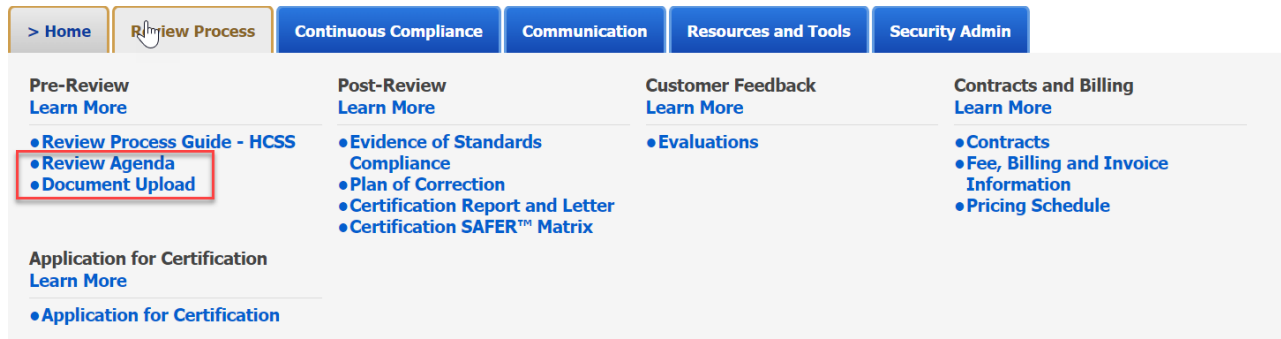
Thank you for your participation in The Joint Commission Offsite Review process. Your organization will be evaluated against Joint Commission Standards over the Microsoft Teams platform (in some instances, an onsite follow up event will be conducted to fully assess all applicable standards). In order to prepare your organization for a review conducted over Microsoft Teams, please review the below resources as soon as possible. For any additional questions, please reach out to your organization's assigned Account Executive.

Step 1: Signing the Amendment to Permit Virtual Survey

In order for your offsite review to be scheduled we need you to electronically sign the contract entitled, "Amendment to Permit Virtual Survey." This grants us permission to perform your survey/review offsite as opposed to onsite. This contract can be signed under the Contracts section of your organization's Connect site. Once logged into the Connect site please go to the Review Process tab and select Contracts all the way to the right. You will then find the contract titled, "Amendment to Permit Virtual Survey" and sign.

Step 2: Review Agenda and Required Documents

Certification Programs: The review agenda can be located under the review process tab and clicking on the Review Agenda link under the Pre-Review section, then identify the program in which you are seeking. The required document list is located under the document upload link, it will take you to another page, then click on link "Document Upload Resources".



The screenshot shows the Microsoft Teams navigation menu with the "Review Process" tab selected. The menu items are: > Home, Review Process, Continuous Compliance, Communication, Resources and Tools, and Security Admin. Below the navigation bar, there are four main sections: Pre-Review, Post-Review, Customer Feedback, and Contracts and Billing. The Pre-Review section is expanded, showing a list of links: Review Process Guide - HCSS, Review Agenda, and Document Upload. The Review Agenda and Document Upload links are highlighted with a red box. Below this list, there is a link for "Application for Certification".

Step 3: Document Upload Access and Document Upload Instructions

As a result of the review being conducted over Microsoft Teams, a specific list of required documents will need to be uploaded to our secure Joint Commission Connect site. It is recommended that you begin gathering and uploading these documents **immediately**. **All documents are required to be uploaded by the due date listed on the "What's Due" section.** As referenced in the Postponement policy located in the CERT chapter of the manual, failure to upload these documents by the 7-day notice may result in a cancelled review and postponement fee applied.

Document Upload Instructions

Please follow the instructions below to complete your Document Upload:

1. Ensure that all the appropriate contacts have security rights to the document upload section on the Connect site.

General

Extranet Applications/Tasks	Security Rights
Complaint Response/Self-Report Sentinel Event/Sentinel Event Activities	<input type="radio"/> None <input checked="" type="radio"/> Full
Contracts	<input type="radio"/> None <input checked="" type="radio"/> Full
Correspondence	<input type="radio"/> None <input checked="" type="radio"/> Full
Document Upload	<input checked="" type="radio"/> None <input type="radio"/> View Only <input type="radio"/> Full
Evaluations	<input type="radio"/> None <input checked="" type="radio"/> Full
Evidence of Standards Compliance/Plan of Correction	<input type="radio"/> None <input checked="" type="radio"/> Full
Fee, Billing and Invoice Information	<input type="radio"/> None <input checked="" type="radio"/> Full
Intracycle Monitoring(ICM)	<input type="radio"/> None <input checked="" type="radio"/> Full
Notification of Scheduled Events	<input type="radio"/> None <input checked="" type="radio"/> Full
Official Email Communication	<input type="radio"/> None <input checked="" type="radio"/> Full
Quality Reports	<input type="radio"/> None <input checked="" type="radio"/> Full
SAFER Dashboard	<input checked="" type="radio"/> None <input type="radio"/> Full
Survey Planning Tools	<input type="radio"/> None <input checked="" type="radio"/> Full

2. Refer to the appropriate document list for your organization’s certification program that indicates which documents need to be uploaded in advance by accessing the Document Upload Resources link.

3. Click on the folder link and begin uploading your documents by clicking on the Upload button.
Note: Only pdf, docx, pptx, xlsx, txt formats are supported with max size of 10MB for each document. No special characters except minus and underscore are allowed in the filename. Filename cannot exceed 125 characters.

4. For each document that is uploaded, you will select a tag to apply to that document to indicate

which document requirement it satisfies. The document list includes the tag name next to each document requirement.

DOCUMENT UPLOAD FOR ALL PROGRAMS

To prepare for the DSC review for all certification programs, please upload the following documents to the Connect site **no later than the Due Date provided on the “What’s Due”**. **THERE IS NO NEED TO PRINT THESE DOCUMENTS AGAIN FOR THE REVIEW DAY.**

- Program scope of services, mission, and vision **Tag: Program Scope, mission, and vision**
5. Once all of the required documents have been uploaded the folder will show with a green check mark indicating that the folder is complete and will then be removed from the “What’s Due” section. *Note: Your organization can continue to access the folder under the review process tab and clicking on Document Upload if any changes to uploaded documents are needed.*

Step 4: Microsoft Teams Platform

The Offsite survey/review process is conducted utilizing the Microsoft Teams platform. Please be sure to familiarize yourself with the Teams platform prior to the survey. The below link will direct you to numerous resources that organizations we serve have found beneficial in preparing for their offsite review.

[Microsoft Teams Videos](#)

Day of Review: Accessing the Microsoft Teams survey link

Certification Review: Shortly after your organization has received notice of the review being scheduled, the reviewer provides a meeting invite to access the secure Microsoft Teams meeting. **The meeting invite will be emailed directly to the Primary Certification Contact.**

Additional Video Conference Instructions for the Review Day:

- Opening Conference
 - All participants should connect to the video conference link at 7:50 am. The session will begin promptly at 8:00 am local time.
 - To protect PHI, we will work together prior to the start and throughout the review to ensure that all persons connected to the video conference application is invited and employed by your organization.
 - All cameras should be on, and all microphones muted unless the participant is speaking.
 - To start the session, the reviewer will share a slide deck and say a few opening remarks.
 - Then, the reviewer will invite you to give your presentation, and you will have the opportunity to share your slide deck on the screen.
 - To end the session there will be a Q&A period.
- Planning Session
 - Please be prepared to share a list(s) of patients as specified in the Review Process Guide for your program.
 - The reviewer will select patients for tracers from the list(s).
- Individual Tracer Activities
 - The medical records and program documents will need to be shared with the reviewer via the video conference application. You can do this on almost any computer, including desktop computers, portable workstations, or laptops.

- It is vital that the conference rooms and patient care areas where tracing activities could occur can use the video conference application link. In patient care areas, this has often been accomplished using a leader's office computer.
- A tablet or other portable device may be used for patient or staff interviews.
- Please note that paper documents must be scanned in so they can be shared with the reviewer.
- System Tracers
 - Data Session
 - It is recommended that programs prepare a slide deck with the required elements to share over Teams. Please see the certification manual for requirements.
 - Competency & Credentialing Session
 - Files for interdisciplinary team members will be selected throughout the review process
 - Required documents are outlined on the agenda. These must be shared with the reviewer during this session.
 - If the documents are on paper, we recommend scanning them to PDF to make sharing more efficient
- Summary Discussion and Exit Conference
 - As with the Opening Conference, participants will need to have cameras on but mute their microphones unless they're speaking.
 - The reviewer will share the Preliminary Report and give closing remarks

Please Note that the agenda for every certification review can be found, listed by program, on this website: [Review Agenda | The Joint Commission](#)