

Health Care Staffing Services Certification
One Reviewer for One Day – Review Agenda

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 - Dialogue about what the reviewer can do to help make this a meaningful 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 ▪ 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 ▪ 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) and individual(s) responsible for these functions

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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	Competence Assessment & Credentialing Session - Application process - Employment history checks - Credentials verification process - Hiring criteria - Orientation - Placement criteria - Clinical staff to customer matching process - Clinical staff supervision - Clinical staff performance evaluation, including customer feedback	Individuals responsible for managing and performing these processes

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Time	Activity	Organization Participants
	- 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 - <u>Discussion during this activity will focus on the firm's internal credentials quality assurance audit process, including</u> ▪ <u>Reporting audit results</u> ▪ <u>Compiling and analyzing the audit data for trends</u> ▪ <u>Identifying opportunities to improve the credentialing process</u> ▪ <u>Planned improvements or changes already implemented to the credentialing process</u> ▪ <u>Efforts to maintain and sustain improved performance</u>	Individual(s) with authorized access to files Individual(s) who can facilitate the file review Individual(s) that performs credentials audits for the firm
30 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

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Time	Activity	Organization Participants
60 minutes	Summary Discussion & Reviewer Report Preparation This time will be utilized for a final discussion prior to the reviewer's report preparation and the exit conference. Topics that may be discussed include: • Any issues not yet resolved (IOUs) • The identified Requirements For Improvement (RFIs) • What made the review meaningful to the team • Sharing best practices to inspire quality improvement and/or outcomes • Educative activities of value to the program • Did I meet the goals of your team today?	Certification review coordinator, if requested by reviewer
30 minutes ending at approximately 4:30 p.m.	Organization Exit Conference	Program and clinical leadership Others at the discretion of the organization

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