Health Care Staffing Services Certification

**Multi-Day – Review Agenda**

**First Day**

| **Time** | **Activity** | **Organization Participants** |
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| 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 coordinatorLeader(s)Others at the discretion of the organization |
| 20 minutes | **Reviewer Planning Session***Please note: The reviewer needs a list of customers where clinical staff are currently working or have worked.** 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

*Please Note: The reviewer needs a roster of clinical staff that are currently placed or available for placement, sorted by discipline.** 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 and Data Use**Business Functions* Management and operations
* 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
* Data collection processes
* Data quality and maintaining integrity
* Data analysis processes
* Priorities for improvement
* Certification standardized performance measures
* Customer satisfaction data
* Clinical staff satisfaction data
* Customer complaint reporting
* Clinical staff complaints, exit interview data
 | Leader(s) Individual(s) responsible for these functions |
| 30 minutes | **Review of Firm’s Uploaded Documents** |  |
| 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
* Clinical staff performance evaluation, including customer feedback
* Maintaining competency of clinical staff
 | Individuals responsible for managing and performing these processes  |
| 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 evaluationShould 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 |

**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 evaluationShould 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 |

**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 evaluationShould 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 |