

Joint Commission Survey Readiness Checklist (Template)

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Surveyor Arrival and Orientation

- Ensure all facility documents are up-to-date and easy to access on the day of your survey.
- Reserve a private space for surveyors to meet and reside in during the day.
- Designate which staff will orientate surveyors to the layout of your facility.

Care, Treatment, and Services

- Brief staff on what to expect during a surveyor visit.
- Notify staff who are expected to be available and provide any pre-survey training when necessary (staff participation requirements are detailed in the Survey Activity Guide).
- Ensure performance monitoring data and quality indicator metrics are available.

Competence, Credentialing, and Privileging

- Compile all employee files, ensuring that details are accurate and up-to-date.
- Prepare a copy of all employee bylaws, including training manuals, credentialing requirements, and continuing education guidelines.
- Review organizational processes for credentialing, onboarding, and training for all employees and contractors.

Line Safety Code

- Allocate a ladder and flashlight to be used during facility inspection.
- Assign maintenance staff to escort the surveyor through locked areas.
- Compile an organized set of maintenance records for your facility's fire protection and suppression equipment, emergency power systems, and medical gas and vacuum systems.

Emergency Management

- Review essential emergency and disaster planning policies with all employees.
- Ensure your policies and procedures for Interim Life Safety Measures (ILSMs) are updated and accessible.
- Prepare a list of recent emergencies/disaster incidents and a report of how well your team executed the facility emergency operations plan.

Leadership

- Provide a private room for surveyors to meet with your leadership team.
- Compile a list of recent workplace wellness and quality improvement initiatives, reviewing how they impacted your patients and staff.
- Provide details on how you evaluate performance and provide employee feedback.

Report Back and Exit Survey

- Notify senior members of the executive team of the time and location for the exit survey meeting.
- Prepare a private conference room, equipped with a large table, power outlet, and a telephone.
- Identify how you will re-collect all facility documents from the surveying team.