Offsite (formally Virtual) Survey and Review Framework: A New Approach for Conducting Surveys and Reviews During the Pandemic

**STEP ONE: Establishing eligibility**
Onsite surveys are the priority for most accreditation and certification programs – even during the pandemic and its aftermath. Virtual or offsite surveys and reviews may be an option if the pandemic is not controlled in your area or your program fits well within a virtual approach and eligibility criteria apply. Your Account Executive is the expert on how current eligibility criteria may apply to your organization.

**STEP TWO: Pre-survey prep call**
Once eligibility is established, a pre-survey or review call is scheduled. The purpose of this call is to test an organization’s technology capabilities – especially WiFi connectivity in survey or review critical areas and the ability of an organization to scan and upload documents for review ahead of and during the event. Expectations, including activities conducted offsite, are also reviewed.

**STEP THREE: Scheduling the Offsite Event**
Offsite events follow the same announced or short notice protocols as onsite events. If your scheduled event is one that qualifies for short notice, you will receive notice of the activity. Otherwise, offsite events remain unannounced.

**STEP FOUR: Conducting the virtual review**
On the morning of the event, organizations will receive notice on their extranet site. Links to Zoom meeting invitations are imbedded in the survey or review agenda. The agenda will outline the activities planned for each day.

**STEP FIVE: Post-survey process**
Accreditation or Certification decisions will be rendered following an offsite event in most cases. As in onsite events, you will work with your account executive for any post-survey or review requirements such as evidence of standards compliance submissions. In some instances, a follow-up onsite event will be required.

The meaningful accreditation and certification experience you expect, delivered differently. Here’s how...

- Surveyors and Reviewers seamlessly facilitate the virtual event while providing the highest level of knowledge and expertise
- The Offsite Surveys and Reviews process is tailored to address the unique differences between an on-site review and one that’s performed on Zoom
- Screen sharing allows participants to clearly identify and understand opportunities for improvement
- The Offsite Surveys and Reviews model allows greater organization participation than would be possible under current social distancing protocols

For more information on Joint Commission accreditation, please call 630-792-5800 or email customerservice@jointcommission.org.