



HEALTHCARE HR

Joint Commission Survey-Readiness Checklist for Healthcare HR



Survey-readiness breaks down when documentation isn't connected.

As roles evolve and systems multiply, requirements and evidence drift apart. What should align job definitions, qualifications, competencies—ends up spread across files, platforms, and teams.

This checklist is designed to pull that back together. Use it to organize your documentation, track status, and ensure everything holds up as a complete, consistent record.

Prefer a spreadsheet ?

Access this resource in XSL format.

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JC-01 Verification - Education



Requirement Summary

If a job description includes minimum education or experience requirements, the organization must verify and document them.

Surveyor Evidence to Show

- Current job description with stated minimum qualifications;
- HR file evidence that education/ experience was verified when required.

JDXpert Support / Proof Point

JDXpert can standardize job description fields, enforce required qualification fields, and preserve approved role requirements as the governed source of truth.

OWNER	PRIORITY	STATUS	DUE DATE	EVIDENCE LINK/FILE REVIEW	LAST REVIEWED	GAP / REMEDIATION NOTES	SOURCE URL
	● High	Not started					LINK

JC-02 Primary Source Verification



Requirement Summary

Current licensure, certification, or registration must be primary-source verified when required by law or regulation.

Surveyor Evidence to Show

- Credential requirement by role; proof of PSV from licensing board
- Approved source; date of verification; renewal controls.

JDXpert Support / Proof Point

JDXpert can define credential requirements by role and retain audit evidence around those requirements, but PSV itself may rely on credentialing/HR integrations.

OWNER	PRIORITY	STATUS	DUE DATE	EVIDENCE LINK/FILE REVIEW	LAST REVIEWED	GAP / REMEDIATION NOTES	SOURCE URL
	● Critical	Not started					LINK

JC-03 Competency Assessment - Requirements



Requirement Summary

Competency must be assessed against the actual assignment and can be evaluated through observation, peer feedback, prior employer information, tests, and credential review.

Surveyor Evidence to Show

- Role-specific competency expectations; completed assessments; evidence of evaluation methods; assignment-specific documentation.

JDXpert Support / Proof Point

JDXpert can align job duties, skills, and competency expectations so assessment programs map cleanly to the governed role definition.

OWNER	PRIORITY	STATUS	DUE DATE	EVIDENCE LINK/FILE REVIEW	LAST REVIEWED	GAP / REMEDIATION NOTES	SOURCE URL
	● High	Not started					LINK

JC-04 Competency vs Education / Performance Evaluation



Requirement Summary

Competency is distinct from training or performance review; organizations should assess role-specific skills, knowledge, and ability on an ongoing basis.

Surveyor Evidence to Show

- Evidence that competency assessments are not merely annual reviews or course completions; cadence and method of reassessment.

JDXpert Support / Proof Point

JDXpert provides the structured role and skills framework that supports a defensible competency model and clear differentiation from training/performance processes.

OWNER	PRIORITY	STATUS	DUE DATE	EVIDENCE LINK/FILE REVIEW	LAST REVIEWED	GAP / REMEDIATION NOTES	SOURCE URL
	● Medium	Not started					LINK

JC-05 Contract Staff - HR Standards



Requirement Summary

Human resource standards apply to contract staff providing care, treatment, or services; contracts should specify that personnel are qualified by education, training, licensure, and competence.

Surveyor Evidence to Show

- Contract language; role definitions for contract staff; qualification and competency evidence; consistent requirements across worker types.

JDXpert Support / Proof Point

JDXpert can apply common role expectations and qualification fields across employees and contract roles for a more consistent compliance posture.

OWNER	PRIORITY	STATUS	DUE DATE	EVIDENCE LINK/FILE REVIEW	LAST REVIEWED	GAP / REMEDIATION NOTES	SOURCE URL
	● High	Not started					LINK

JC-06 Contracted Services Program Inclusion



Requirement Summary

Contractual agreements should allow contract personnel to participate in orientation, competency assessment, ongoing education, performance evaluation, health screening, and emergency/fire prevention programs where applicable.

Surveyor Evidence to Show

- Contract clauses; proof of inclusion in required organizational programs; operational ownership for follow-through.

JDXpert Support / Proof Point

JDXpert can govern the role expectation layer and audit trail, while operational completion may depend on HR, LMS, and credentialing systems.

OWNER	PRIORITY	STATUS	DUE DATE	EVIDENCE LINK/FILE REVIEW	LAST REVIEWED	GAP / REMEDIATION NOTES	SOURCE URL
	● Medium	Not started					LINK

JC-07 Current, Retrievable Documentation



Requirement Summary

Survey-readiness depends on current, retrievable, defensible documentation against Joint Commission standards and elements of performance.

Surveyor Evidence to Show

- Version-controlled role records, approval history, evidence exports, current policies, and fast retrieval during survey.

JDXpert Support / Proof Point

This is JDXpert's strongest support angle: controlled changes, versioning, approvals, and audit-ready evidence exports.

OWNER	PRIORITY	STATUS	DUE DATE	EVIDENCE LINK/FILE REVIEW	LAST REVIEWED	GAP / REMEDIATION NOTES	SOURCE URL
	● Critical	Not started					LINK

JC-08 Employee Acknowledgment / Job Sign-off



Requirement Summary

Joint Commission does not appear to require a universal employee signature on the job description, but organizations should be able to show that responsibilities, qualifications, and competency expectations were defined, communicated, and documented.

Surveyor Evidence to Show

- Optional but helpful evidence such as employee acknowledgment of job description receipt/review, date/time of acknowledgment
- Proof the acknowledgment matches the current approved role version.

JDXpert Support / Proof Point

JDXpert can support a governed acknowledgment workflow with version-aware auditability, including who acknowledged, when they acknowledged, and which approved role version was acknowledged.

OWNER	PRIORITY	STATUS	DUE DATE	EVIDENCE LINK/FILE REVIEW	LAST REVIEWED	GAP / REMEDIATION NOTES	SOURCE URL
	● Medium	Not started					LINK

Govern Your Job Information

Is your job information managed or just stored? Learn how leading health systems are eliminating clinical role drift, credential gaps, and audit exposure across facilities — without rebuilding from scratch.

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