

Component	Task	Assigned Responsibility	Status
Surveyor Arrival	<ul style="list-style-type: none"> ○ Ensure all front desk staff are aware of the surveyor arrival protocol ○ Check Identification: Driver's license and company ID recommended ○ Surveyor Sign-in ○ Notification of point person or designee ○ Detainment of surveyors in designated area until all surveyors arrive ○ Designated person escorts team to surveyor work area ○ Activation of Staff Alert system 		
Surveyor Work Area	<ul style="list-style-type: none"> ○ Designated area away from office traffic and away from the command center ○ No ready access to patient or other sensitive information ○ List of key telephone numbers provided ○ No access to photocopier ○ Professional look and feel ○ Adequate space to accommodate entire team ○ WiFi Access ○ Ample access to electrical outlets for computers 		
Communications	<ul style="list-style-type: none"> ○ Activate survey communications plan <ul style="list-style-type: none"> ○ Pager activation ○ Text message activation ○ Overhead Announcements ○ Telephone messages 		
Survey Execution	<ul style="list-style-type: none"> ○ Ensure that surveyor escorts are prepared and Electronic Health Record Superusers are available for each surveyor. 		
Survey Team Logistics & Evidence	<ul style="list-style-type: none"> ○ Provide Evidence Binders upon arrival ○ Activate kitchen staff- provision of beverages and light snacks 		

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Binders- Required Documents	<ul style="list-style-type: none"> ○ Review basic logistics with survey team- location of restrooms, designated smoking areas 		
Patient/Client Listings	<ul style="list-style-type: none"> ○ Provide listing of current admissions ○ Current patient list to contain admission date, diagnosis, name ,and age 		
Home Care- Hospice Component	<ul style="list-style-type: none"> ○ Provide list of patients scheduled for home visit during the survey period 		
Additional documents to have readily available if asked for	<ul style="list-style-type: none"> ○ Employee roster: employee name, hire date, role and assigned location 		
Clinical Contract documentation	<ul style="list-style-type: none"> ○ Ensure you are able to produce the contract, performance expectations/ performance measures for each contract and the most recent completed evaluation 		
Survey Execution Readiness	<ul style="list-style-type: none"> ○ Identify those persons within the organization that can serve as surveyor escorts and note takers. ○ Request Leadership develop a list of points of contact for each department that goes at least three levels deep in the department/unit. 		
Survey Execution	<ul style="list-style-type: none"> ○ Gather staff who will be providing survey activity support ○ Implement preparedness plan ○ Utilize central communication room/command center to facilitate ALL communications ○ Minimize talking with and around surveyors ○ Ensure timely retrieval of requested materials 		
Survey Coordinator Role	<ul style="list-style-type: none"> ○ Keep track of all information provided, stay organized ○ Check back with surveyors frequently ○ Document your conversations ○ Provide only what is requested 		

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	<ul style="list-style-type: none"> ○ Answer the questions as asked. If you can't answer the question, say you will get back with them, research it and then get back with them ○ Utilize the Issue Resolution Time to clarify surveyor findings, provide additional documents and debate compliance challenges (<i>Help me to understand... approach recommended</i>) 		
Daily Briefing	<ul style="list-style-type: none"> ○ Pay careful attention to findings discussed during daily briefing sessions ○ Confirm the day's agenda. Are they on schedule? What are tomorrow's plans? 		
Daily Internal Team Debriefing	<ul style="list-style-type: none"> ○ Host a daily end-of-day debriefing with the hospital team ○ Review the list of opportunities identified to date and reinforce the opportunity to minimize their impact through actions. ○ Provide a list of items that must be addressed prior to leaving for the day and any items that need attention by the night shift. 		
End of Survey	<ul style="list-style-type: none"> ○ Obtain a draft copy of the report that will be submitted by the survey team so that improvement activities can begin immediately. ○ Prioritize organizational actions to address those items that create the greatest risk to quality and safety and those that will require a follow-up survey. 		