

SHOW YOU ARE ALWAYS READY

- ▶ Prearrange a Surveyor Space
 - ▶ Main Surveyor Location
 - ▶ Breakout/Interview Rooms
- ▶ Prearrange a Command Center Space
 - ▶ Immediately adjacent to surveyors
 - ▶ Keep surveyors in sight
 - ▶ Computers/Print capabilities
- ▶ Location is key
 - ▶ Away from patient care areas

13

Give and Get Direction

- ▶ Orient surveyors to their room
- ▶ Explain the important need to know items (safety/general info)
- ▶ Establish yourself as their contact
Provide contact phone number for calls / text
- ▶ Provide Wi-Fi information
- ▶ Ask if they have any dietary restrictions
- ▶ Ask how they would like to start the day - Opening/Presentations?

Color	Preference
Blue	Blue folder or binder
Red	Red folder or binder
Green	Green folder or binder
Yellow	Yellow folder or binder
Purple	Purple folder or binder
Orange	Orange folder or binder
Black	Black folder or binder
White	White folder or binder
Grey	Grey folder or binder
Light Blue	Light Blue folder or binder
Light Green	Light Green folder or binder
Light Yellow	Light Yellow folder or binder
Light Purple	Light Purple folder or binder
Light Orange	Light Orange folder or binder
Light Grey	Light Grey folder or binder
Light White	Light White folder or binder

14

SHOW YOU ARE ORGANIZED

- ▶ Provide prepared Documents
 - ▶ Explain the document folder
 - ▶ Get the list of documents that they would like to see
- ▶ Allows them to prep for the day/week

15

STRATEGIES TO GUIDE SURVEYORS

- ▶ Document management
 - ▶ Write down surveyors request exactly as asked
 - ▶ Clarify what they are looking
 - ▶ Label the policy/document exactly as asked
 - ▶ Mark requested section of document with sticky note to guide attention

16

BUILD A GOOD RELATIONSHIP WITH SURVEYORS

- ▶ Go the extra mile
 - ▶ Provide parking arrangements (map and code)
 - ▶ Provide badge (no check-in required)
 - ▶ Give a list of good restaurants in the area (Multiple day survey)



17

Command Center Management

18

In Advance of Survey- Planning

- ▶ Survey Team- response team to support the functions needed- predetermined pool cross trained to cover critical positions in the command center
 - ▶ Clipboards with job action sheets/duties for defined organizational roles.
 - ▶ Regulatory Chief
 - ▶ Incident Commander
 - ▶ Logistics
 - ▶ Communication
 - ▶ Researcher
 - ▶ Policies
 - ▶ Data
 - ▶ Resource Coordinator
 - ▶ Binder- starter kits
 - ▶ Support roles- runners, administrative, TBA to address specific needs
 - ▶ SME's Infection Prevention

19

In Advance of Survey- Planning

- ▶ Conduct mock tracers and mock survey- CSRR rounds
- ▶ Prepare mobile survey cart with supplies- sweeper checklists, Day of Survey checklist
- ▶ Test technology
- ▶ Designate Scribes and Escorts- Templates, Conduct practice sessions
- ▶ Revalidation Survey- Prepare CAP folders and large printout/checklist of areas in scope of survey

20

Command Center Objectives

- ▶ Central hub for briefing and debriefing activities and issues
- ▶ A repository for both receiving and sending information
- ▶ Mitigation- resolve issues (unpredictable), ensure an appropriate depth of response, reduce risks and vulnerabilities
- ▶ Monitors, tracks, records and communicates all survey activities occurring
 - ▶ Notifying care areas of any events that require immediate attention, surveyor(s) location and surveyor trends/interests.
 - ▶ Locating and providing P&P's, data files, other docs upon surveyor request- (any doc given to surveyor is reviewed by and delivered by command center)
 - ▶ Identifying SME's for chart audits
 - ▶ Providing timely updates to leadership throughout the day
 - ▶ End of day debriefing to discuss survey issues, recommendations and success factors

21

Day of Survey- Response

- ▶ Process to follow upon notification- command center activation and response team initiation
- ▶ Chief of Regulatory greets the surveyors, checks ID's, orients to visitor sign in- escorts to a videoconferencing room for opening session
- ▶ Preassigned Teams are deployed to the units to sweep
- ▶ Overhead announcement welcoming the agency-
- ▶ Hospital notification plan- department managers, physicians, staff at large
 - ▶ Telephone list activated
 - ▶ SOS group communication via email at different intervals
 - ▶ Text thread with Executives and Directors- utilize call down tree to advise further
 - ▶ Text thread with IT and HR
- ▶ Opening conference/session arranged
- ▶ Scribes and Escorts report to Command Center for briefing and assignments- We do not leave any surveyor to their own devices
- ▶ Document management

22

After Survey Recovery

- ▶ Strategies to help the hospital resume normal operations
- ▶ Develop corrective actions
- ▶ Continue training all leadership staff- surveys are an opportunity to reinforce the routine trainings

23

Discussion / Questions

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24

Managing Hospital Survey: A View from the Front Lines

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