



CHARTIS

Smart Survey Preparation

Turn the cost of doing business into an engine for *safety, quality and efficiency*



**The webinar will start
at the top of the hour.**

MONTHLY INSIGHTS

Webinar schedule & topics

LIVE WEBINAR START TIMES

10AM Pacific, 1PM Eastern

MARCH 19, 2026

Smart Survey Preparation

APRIL 16, 2026

Cleaning, Disinfection, and Sterilization

Navigating the Zoom interface

Handouts:

Check the chat function for copies of the slides for note taking and any other handouts.

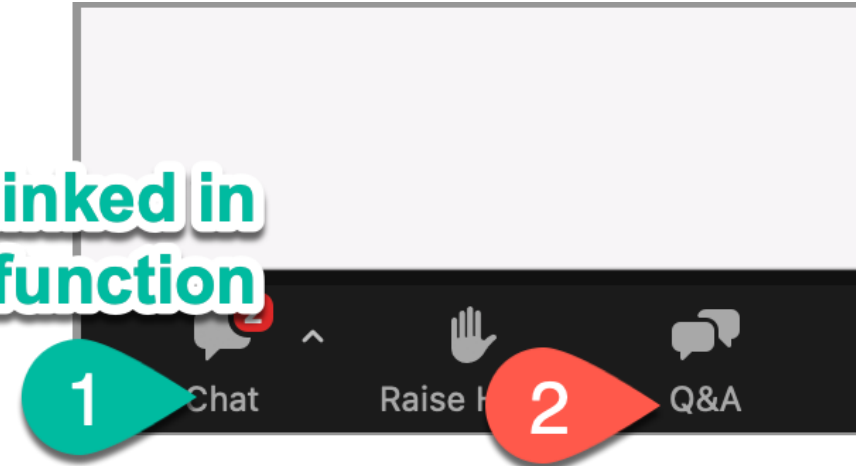
Questions and comments:

Please participate in the discussion by asking question through the Q&A function during the webinar.

There will also be a survey you will receive immediately after the webinar that will give you an opportunity to ask additional questions or make comments.

Any questions not answered during the webinar will be addressed in a follow-up email or posting.

Handouts are linked in the “chat” function



Please ask questions by clicking on “Q&A”

Past webinars available for streaming



Greeley
A CHARTIS COMPANY

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Filter

BY TOPIC

- Clinical Quality
- High Reliability
- Infection Control
- Medical Staff
- Medical Staff Services

MORE ▾

BY EXPERTISE

- Bylaws and Rules & Regulations
- Clinical Compliance
- Credentialing & Privileging
- External Peer Review
- Interim Staffing Solutions


MORE ▾

41 RESULTS

Webinar ✕ CLEAR ALL ✕


Seconds to contaminate, years to recover

This session will examine regulatory standards governing high-level disinfection and sterilization, with emphasis on how surveyors interpret and apply those requirements in acute and procedural settings.



Smart survey preparation

Turn a "cost of doing business" into an engine for safety, quality, and efficiency.



Transforming the MSSD Into a Strategic Asset

As former caregivers, administrative leaders, and medical services professionals, we see the opportunity to transform your MSSD.

\$1.3M	\$1-5M	\$10K
The average total cost to replace a single physician	Recent negligent credentialing verdicts	One-day delay in provider onboarding

Past webinars available for streaming...*a sample*

Regulatory, Accreditation

- Coping with CMS/State-Agency Surveys
- EMTALA
- TJC's Accreditation 360
- Artificial Intelligence and Compliance
- Workplace Violence
- Survey Management
- Coping with Survey Hotspots
- New QAPI Interpretive Guidelines
- Challenges in the Physical Environment
- Infection Prevention
- Responding to CMS/State Citations
- Suicide Prevention

Quality, Safety, and Reliability

- Translating Clinical Indicators for the Board
- Preventing Burnout
- Scorecard Indicators ... Rankings
- Patient Safety Structural Measures
- QAPI Tips
- Clinical Documentation Integrity (CDI)
- Preventing Adverse Events

Medical Staff

- Peer review
- Practitioner Performance
- Medical Staff 101
- System-wide Medical Staff Office Functions

Healthcare challenges are not siloed.

Neither are we.

Chartis has **six lines of business** that together craft **singular solutions**.

- 1000+ Professionals
- Mission: to materially improve healthcare
- Ranked Best Overall Management Consulting Firm by KLAS
- Chartis acquires Greeley in 2019, became Chartis Clinical Quality Solutions in 2022
- Greeley brand brought back in 2024 to cover Medical Staff Services Related Offerings and now part of Clinical Transformation



High Reliability Care

UNPARALLELED BREADTH AND DEPTH

Our clients are all striving toward the same goal of providing safe, high-quality care—something that’s becoming even more important with the many distractions and disruptions in healthcare today. We help clients achieve their organizational reliability, quality, and safety goals, leading to results in areas that matter most—improved care outcomes, staff engagement, operational stability, and total cost of care, enhanced reputation, and better patient experience.

High Reliability Organization (HRO)

- High reliability organizational design and infrastructure
- Quality, Value, and Performance Improvement
- Quality ratings and rankings optimization
- Patient safety / harm reduction / safety and reliability culture
- Adverse event response and remediation / RCA
- High fidelity measurement / Clinical Documentation Integrity (CDI)
- Care facilitation

Clinical Compliance, Regulatory, and Physical Environment Solutions

- Adverse event response
- Adverse action regulatory response and remediation
- Accrediting body readiness assessment
- Regulatory readiness rehearsal / mock surveys
- Life safety and environment of care assessment
- Policy simplification
- Infection prevention program

Bylaws, Rules and Regulations, and Peer Review

- Bylaws and rules and regulations assessment and redesign
- Peer review assessment and redesign
- Medical staff / medical director structure and governance
- Credentialing, OPPE

External Peer Review

- Physician/advanced practice professional external peer review
- Focused Professional Practice Evaluation (FPPE)
- Ongoing case review in support of OPPE/FPPE
- Medical necessity reviews
- Case reviews for quality of care the patient safety

MEMBERSHIP AND PROFESSIONAL EDUCATION SERVICES

Today's *discussion*

SMART survey Preparation

Prioritize

Improve

Sustain



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Today's *agenda*

The Challenge

Sustainable Solutions

Leveraging External Survey Rehearsals

*Questions should be posted in the webinar interface throughout the presentation.
We will respond to any unanswered questions in writing following the webinar.*

The Challenge



Thousands of requirements impacting *your* institution

- Accreditation
- Medicare / Medicaid
- OSHA
- Billing
- Special Certifications
- State and Local Requirements
- Referenced Standards and Guidelines
 - ✓ USP
 - ✓ NFPA 101, 99, 56, ...
 - ✓ AAMI / ANSI
 - ✓ IFUs
 - ✓ Etc.



Accumulation of issues

- 50 Years of Survey Findings
 - ✓ A Mountain of Corrective Actions
 - ✓ Many Monitoring Indicators
- New Standards and Requirements
- Sibling Hospital Surveys
- Discussion Groups
- Webinars and Conferences
- Internal Process Monitoring
- Adverse Event Analysis
- Mock Surveys

Sustainable Solutions

Prioritize

Improve

Sustain

Prioritize

Boil *just a little* of the ocean at a time

■ Focus / Prioritize

- ✓ A, B, C, D
- ✓ Dispel Myths
- ✓ Retire Indicators
- ✓ Identify Issues from Data Points

■ Simplify

■ Implement

■ Course Correct



Prioritization

Prioritize issues regardless of the source. If the issue is “falls prevention,” it does not matter whether the issue arose from internal process monitoring, the study of adverse events, or a regulatory citation or vulnerability.

- Multiple issues at once?
- Ranking of Issues
 - ✓ Regulatory Citation
 - ✓ Ease of Remediation
 - ✓ Relationship to
 - Patient and Associate Safety
 - Quality Outcomes
 - Satisfaction
 - Efficiency

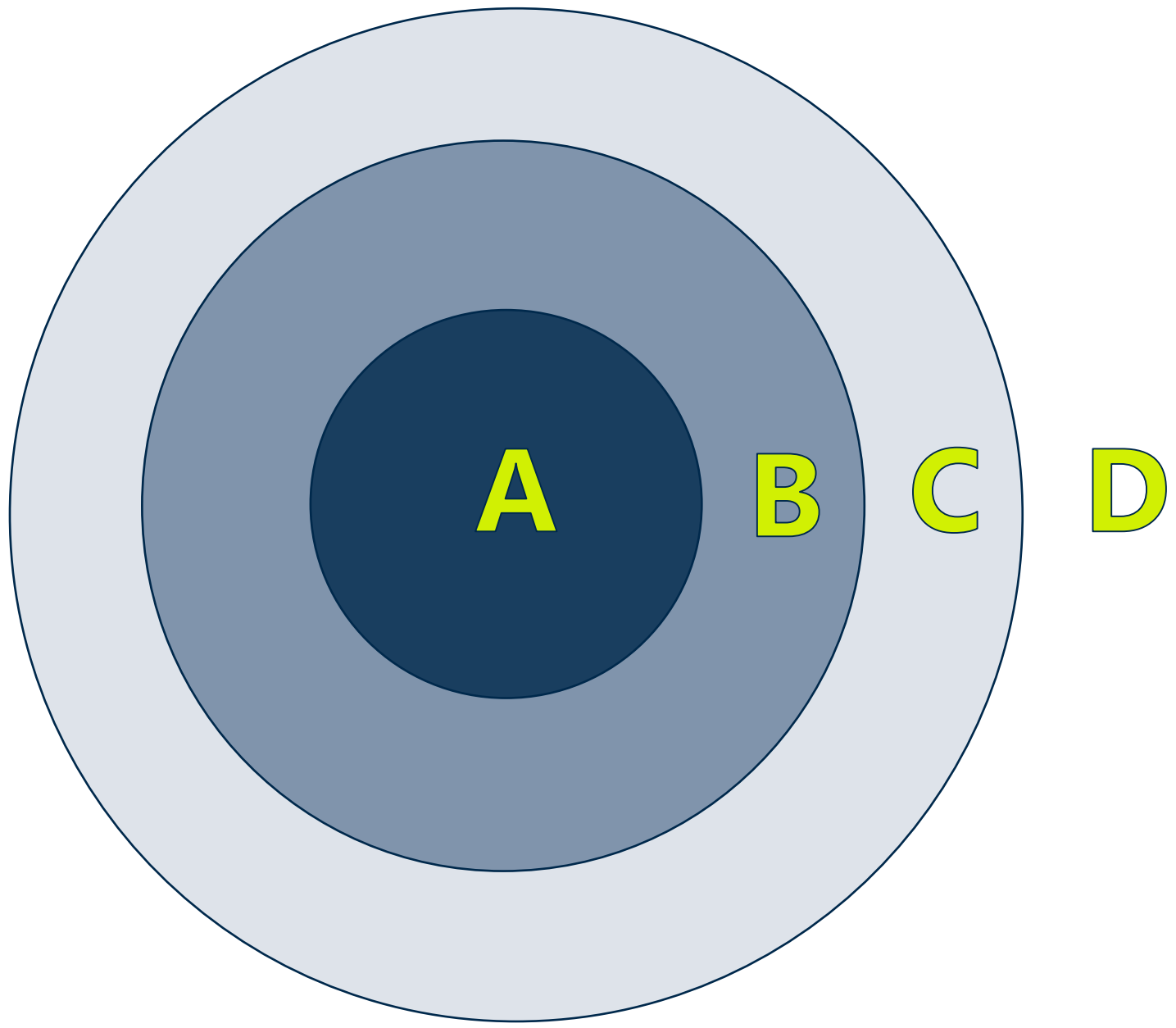
The Target: Survey Success

A Previous Condition-Level
Deficiency

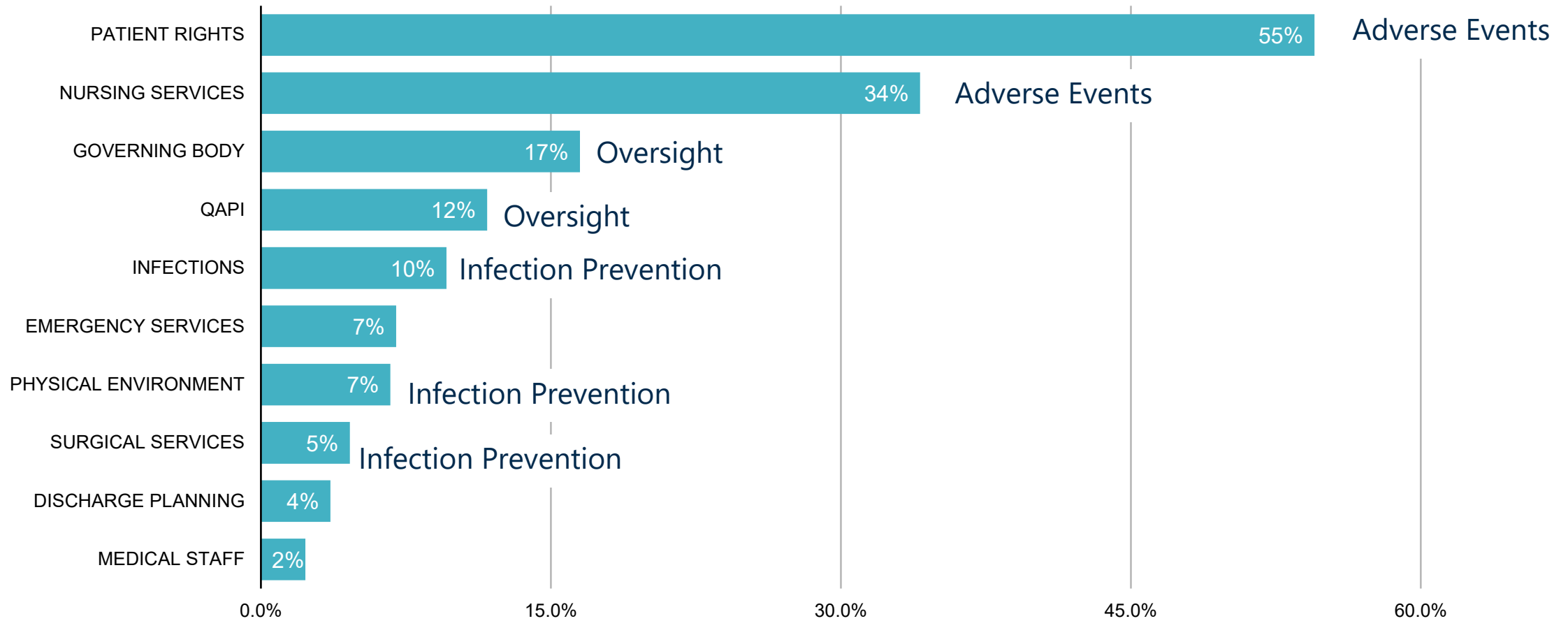
B Other Significant Issues,
Same CoP or Subject

C Condition-Level Issue
NOT Previously Cited

D Everything else



Frequency of condition-level findings for CMS hospital surveys (excluding EMTALA)



Source: CMS CQOR 2024/5

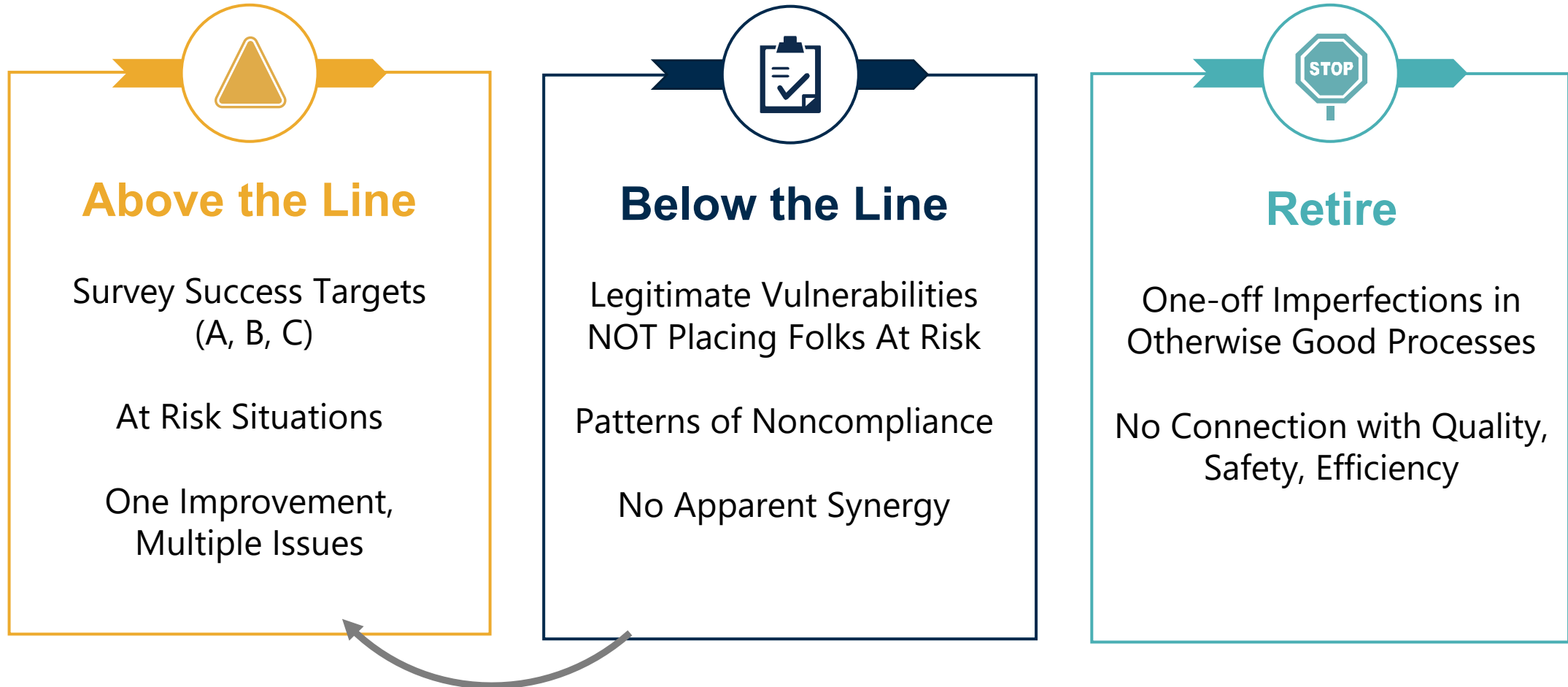
Where to Focus: Digging Up Dandelions



Ask Yourself: If I dig a little deeper can I solve *multiple issues at once*?

- Can we address persistent environmental defects by improving the rounding and work order processes?
- Can we obtain a better understanding of our policies through culling and simplification?
- Can we effectively implement processes changes through concurrent reinforcement and reporting (care facilitation)?
- Can we obtain better nursing documentation and communication by streamlining the EHR data entry process?
- Can we promote safety by better focusing sitters?
- How can we make the right thing to do the EASY thing to do?

Prioritize



Improve

Sustain

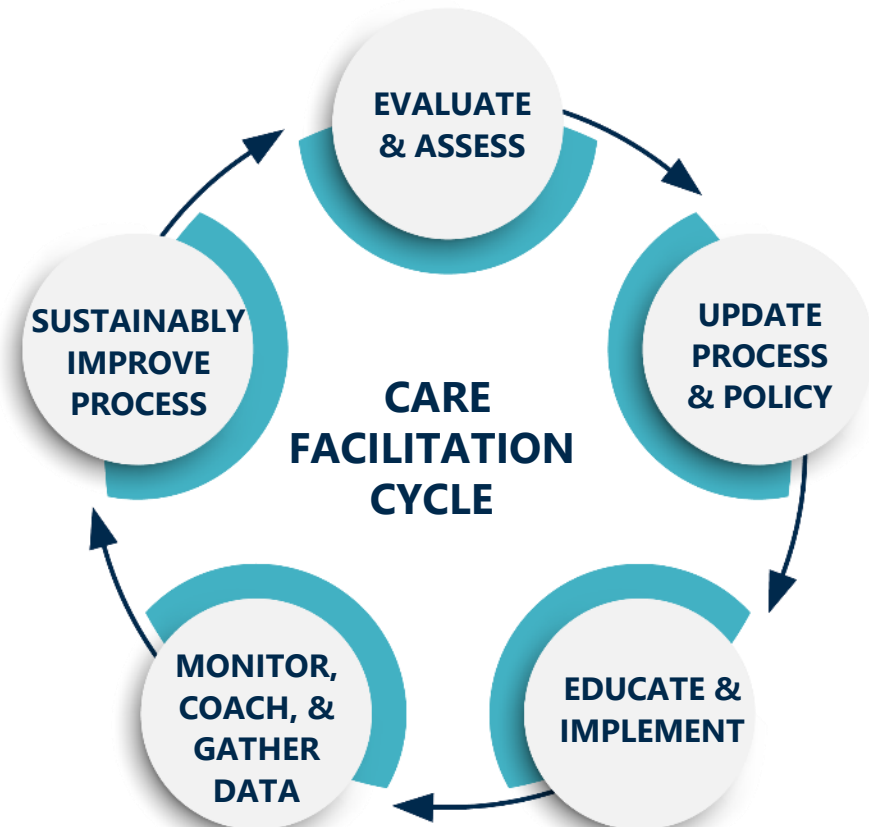
Focus and Simplify

- Choose the process to improve.
- Define, define, DEFINE!! Avoid “while we’re at it.”
- Eliminate duplicate policies, procedures, and guidelines
 - ✓ Streamline those that remain.
- Deploy and test your solution.
- Wash, Rinse, Repeat.
- Reinforce Changes through CONCURRENT interactions.
 - ✓ Start with the process, finish with the documentation.
- Change Course PRN.
- Transition from metrics-based monitoring to adverse event monitoring.

➤ Care facilitation:

Observe. Reinforce. Sustain.

Through concurrent monitoring, the Care Facilitation Process supports real-time coaching, immediate correction of gaps, and reinforcement of best practice, enabling staff to consistently replicate and sustain compliant care.



CARE FACILITATION PROCESS

Ensures sustainable process improvements through:

- **Concurrent monitoring*** provides real-time education and reinforces compliance.
- Monitoring clinical activities and correcting deficiencies in real time.
- Reinforcing practice changes and educating staff in real time.
- Providing data for analysis and oversight of corrective actions.

* Concurrent monitoring (vs. retrospective monitoring)

Allows for:

- Role modeling of care based on policy, quality standards, and practice expectations
- Staff to replicate improved practice
- Repeatable, sustained care process as issues are identified, corrected, and improved

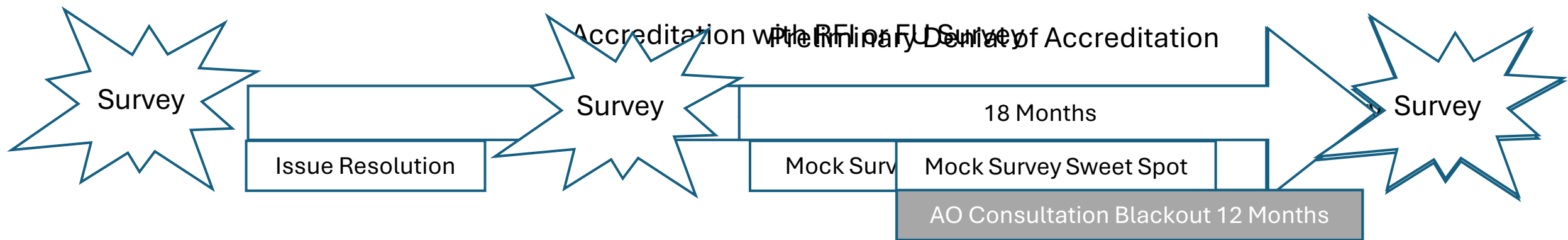
Leveraging External Survey Rehearsals

Proposed final rule ... consultation by accrediting organizations

Proposed Final Rules: February 2024

Final Rule: February 2027

- Accrediting Organizations (“AOs”) would be prohibited from providing fee-based consulting services to accredited facilities within 12 months prior to their scheduled reaccreditation survey.
- AOs would not be able to offer consulting services in response to complaints they receive regarding a provider, as they are required to investigate these independently.
- AOs would still be able to provide consulting to facilities they do not accredit.
- AOs would need to establish strict written firewall policies to prevent conflicts between their consulting divisions and accreditation surveyors.



Meaningful External Consultation

- Don't task your consultant to "find everything," because they will if you ask.
- Instead ask them to move you along your journey to sustained and comprehensive compliance.
 - Survey Rehearsal ... enable associates to perform their very best.
 - Focus on the ABCs ... actual survey findings and effectiveness of remedial actions.
 - Identify setting and processes that need intervention.
 - Focus on the root, not the flower.
 - Promote practical solutions.
- Instead of just playing surveyor, your consultant should evaluate your processes for
 - survey readiness and facilitation,
 - oversight and accountability,
 - survey response,
 - patient safety, and
 - sustained improvement.
- Identify opportunities for simplifying and streamlining policies and documentation.

*You don't want a long
(long) list of dandelions.*

*Instead, you should ask
for a comprehensive
review of your readiness,
response, and
remediation capabilities.*

Questions?



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Thank *you*

