

Acing the Survey: From Survival to Success

We all dread finding out that the surveyor is about to arrive or is already in our building—but with the right preparation, surveys can become much less stressful. In this infographic, find out what you need to know to go from barely surviving to succeeding.

The Survey Process at a Glance



Task 1: Presurvey Preparation

Before arriving at your location, the surveyor collects information about your organization.



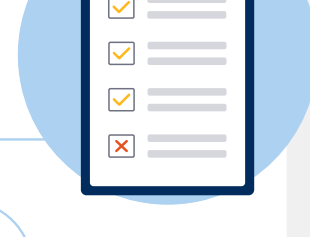
Task 2: The Entrance Interview

The surveyor requests needed information and discusses the upcoming survey.



Task 3: Information Gathering

Your team gathers material from observation, documentation, and interviews.



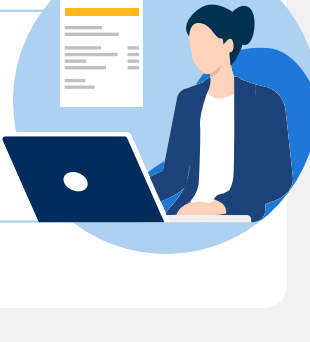
Task 4: Information Analysis

The surveyor analyzes the information you've provided and determines compliance.



Task 5: The Exit Conference

At the end of the survey, the surveyor explains any deficiencies.



Task 6: Statement of Deficiencies

The surveyor writes the deficiency report offsite and sends it to your team.

Know Your Regulations

Nobody wants to be blindsided by a surveyor unexpectedly discovering serious issues. So how can you avoid that? Be clear on which regulations apply to your organization and programs. These might include:



State Licensure

Most states require that home health agencies are licensed. Be sure to have the most current state regulations readily available.



Medicaid

Medicaid programs are typically funded by the state with additional federal funds. There may be multiple types of Medicaid programs in a state, each with its own requirements—so be sure to know them well any time government funds are received.



Medicare Certification

The Medicare Regulations and Conditions of Participation (CoPs) must be adhered to in order to receive payment from Medicare for patient care.



Accreditation

If your agency is accredited, learn the standards of that organization and have them available for all staff to implement.



Did you know?

Some reporting requirements have changed. Some home health provisions are now permanent beyond the COVID-19 PHE. For example, home health agencies can continue to use remote patient monitoring, telephone calls (audio only and TTY), and two-way audio-video technology that allows for real-time interaction between the clinician and patient. Home health services furnished using telecommunication systems are required to be included on the home health claim beginning July 1, 2023. [Learn more.](#)

Succeed with Agency-Focused Tasks

Follow these expert best practices to set your agency up for success with key survey tasks.

For Task 1

- ✓ **Confirm reporting accuracy.** Your agency's organizational chart and other information should match what has been reported to the state and federal government.

For Task 2

- ✓ **Ensure staff availability.** Note that regulations require the administrator, clinical manager/director of nursing, or their alternates to be available at all times in an organization that is responsible for patient care.
- ✓ **Have a designated chain of command ready.** That way, there's no need for a surveyor to wait to start a survey because of missing information.

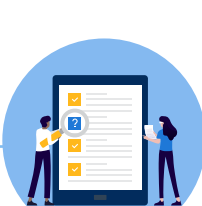
For Task 3

- ✓ **Assess your agency's compliance and overall impression.** Start with the front of the building, and consider creating a checklist based on your organization's survey requirements.
- ✓ **Train staff on answering questions.** Most questions asked by the surveyor are linked directly to a regulation or standard. Teach your staff to think about that connection when answering questions and to answer accordingly.
- ✓ **Practice, practice, practice.** If the surveyor will be interviewing staff or practice with them.
- ✓ **Prepare for home visits.** Ensure that the admission folder is readily present, employees exhibit proper infection control measures, and patients understand their plan of care and know the answers to basic procedures.
- ✓ **Get your documentation in order.** Have your organization's policy and procedure manual complete and readily available.
- ✓ **Fine-tune your Quality Assurance Performance Improvement (QAPI).** QAPI programs are a major focus of the survey process. Ensure that yours is effective and in compliance.
- ✓ **Align daily business with survey protocols.** Regulatory compliance and the survey processes should be so interwoven into daily operations and patient care delivery that your organization is always ready to survive any survey.



"When you remove the mystery of going through a survey, you decrease fear and increase your ability to optimally perform. Avoiding the disconnect between daily operations and survey requirements is the best way to stay prepared. The systems you create to stay in compliance during non-survey times help your organization succeed with surveys and deliver the quality care that patients so richly deserve."

— Nancy Allen, BSN, RNC, CMC



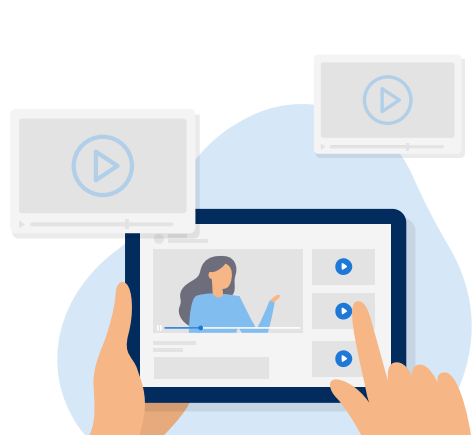
Want to learn more?

Get comprehensive guidance on survey preparation with our white paper ["Survey Survival: How to Be Prepared for Any Survey."](#)

How MedBridge Helps

MedBridge is here to help your agency become survey-proof with a comprehensive platform that includes our Home Health Quality Improvement Solution, evidence-based skills training and assessment, and targeted QAPI and survey-readiness training.

We offer:



- ✓ **MedBridge Skills & Competency Manager**
- ✓ **Home Health Procedural Skills**
- ✓ **MedBridge Compliance Training**
- ✓ **Quality and Performance Improvement**
- ✓ **Home Health QAPI Course Series**
- ✓ **Targeted, expert-led survey training**

About MedBridge

Combining powerful digital patient care tools with the highest quality education, MedBridge is committed to making healthcare better for both providers and patients. Organizations across the care continuum use MedBridge to provide an enriched, digitally enabled experience that engages patients while streamlining and simplifying care. Designed with over a decade of insight from more than 300,000 clinicians and 25 million patients, MedBridge has helped thousands of organizations realize better patient outcomes. [Learn more.](#)

See how MedBridge can help your organization. [Contact us to request a demo.](#)

