

CREDENTIALING CHATTER

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FILE PREPARATION FOR SCHEDULED SURVEYS

The key to any successful survey is PREPARATION. If knowing your strengths is great, knowing your weaknesses is even better.

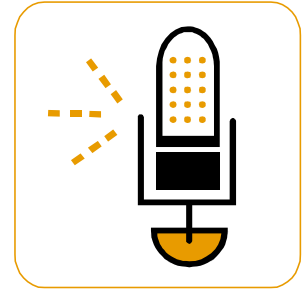
Survey preparedness begins each time a file is approved by a committee. Consider keeping a diary of sorts. Keep a record of the complicated files as well as any files you come across that have been identified as deficient in any survey element. When you have received your file pull list, you can compare it with your list to see if any of the files match. This way, you will be one step ahead of the game.

Also when conducting your file review, keep a list of all files with a Notes section next to each name. Write down your personal notes regarding the files. For example, if a file is perfect in every way, write "clean" or "no issues" next to the practitioner's name. If the file is OK, but there is just something slightly strange, write it down. And the big one, if the file is missing a required element or an element was not obtained in a timely manner (e.g., a license was verified after expiration), make sure you

make a note of it. These notes are a private road map for you and your Administrator.

When you receive your list of files for survey, take the time to go through each file and flag the documents that the surveyor will want to examine. Many, if not all, of you have files that identify each section (e.g., application, DEA, license, education), but these sections can have pages and pages of documents in each of them. Therefore, flagging the pertinent documents is helpful to the surveyor. If you can, place the flags in order starting with the first reviewed document flags at the top of the file and descending accordingly. Mark each flag with the required element so you can turn directly to each piece of paper. Believe it or not, surveyors appreciate the attention to detail and this allows the often slow task of file review to proceed faster. This also provides you the opportunity for one final file review to ensure that you are prepared to answer questions the surveyor may pose.

Surprises are great but not



during a survey. If all of your files are in perfect condition, you won't lose one wink of sleep (Other than the typical panic of whether or not your alarm will go off in the morning, even though it hasn't failed you in the past 25 years!). But, if it turns out that you do have an issue, be sure to prepare your Administrator by presenting the issue, as well as what you have done or are going to do to correct the problem for the future. If the issue is identified by a surveyor during the file review, you are prepared to provide a confident response versus an "Ummmmmmmmmm".

Don't worry, everything will be fine. Just take a deep breath and go! Remember, you are the expert and you are PREPARED.

No time to develop a plan? Give us a call. We can evaluate your preparedness through an assessment that can include review of your files, bylaws, Policies & Procedures or any other area of concern, then help you develop your on-going readiness plan.