Survey Entrance Checklist

Overview

ECS developed resources for our clients to assist with the new survey process (beginning November 28th, 2017). This includes an Easy Access screen specifically for Surveyors, as well as a Survey Entrance Checklist to assist the facility in obtaining necessary information directly from ECS. The Survey Entrance Checklist screen may assist a facility in easily obtaining items out of ECS which are requested of them by the survey team.

Survey Entrance	Upon Entrance	Within 4 hours	End of Day 1	Within 24 hours	Exit
^ Survey Resources CMS Website	^ Census number (defaults to today)	^ 802 Matrix for all residents 802 Roster Matrix	^ EHR Information Sheet Select any name to load	^ 672 Census/Condition Survey Report - 672	
^ Entrance Conf. Worksheet Select any one name to load (08/2017)	^ 802 Matrix for new admits 802 Roster Matrix (Narrow client list down based on admit common task)	^ QAPI Plan Select QAPI name to load			
	^ Alpha. Resident Census (defaults to today)				
	^ Residents who are smokers (based on nursing's Smoking Assessment)				

Miscellaneous Resources

- Survey Resources
  - Takes the user directly to the CMS website where all necessary survey tools are located. This includes the updated F-Tags, CE Pathways, etc.
- Entrance Conference Worksheet
  - This should be run on any one resident and is to be used as an informational tool. This gives facilities the guideline as to what is required to be provided to the survey team.

Upon Entrance

- Census Number
  - Click onto the button, click **Filter**, and make sure both **Active** and **Hold** are checked. Click **OK**. Select all names, click **OK**. This will display the Daily Census Report which has graphs at the bottom to give facilities their total census number for the day it is ran on.
- 802 Matrix for new admits
  - Once within the 802, click onto **Name(s)** and select all. After the 802 has populated with everyone, click onto the checkbox for **Admit Past 30 Days**. This will narrow down the name(s) listed and will only display those who have

admitted within the past 30 days. Click **Print** to produce the report to be provided to the surveyors.

- Alpha. Resident Census
    - ○ Click onto the button, click **Filter**, and make sure both **Active** and **Hold** are checked. Click **OK**. Select all names, click **OK**. This will display an alphabetical list of all residents to include their room number, unit, and status. This report defaults to the day that it is ran on.
- Residents who are smokers
    - ○ This report should be run on all **Active** residents. This will display all residents who are smokers based on the Nurse Charting>Smoking Assessment topic. There are two columns in this report that are not currently asked in the Smoking Assessment that we recommend facilities add into their existing one. The two new words would be: *Designated Smoking Location* and *Designated Smoking Time(s)*.

Within 4 Hours

- 802 Matrix for all residents
    - ○ Once within the 802, click onto **Name(s)** and select all.

QAPI Plan

- If your facility is using QAPI within ECS, this report can be run on the fake resident which the plans are documented on (typically a "QAPI" resident). This report will display only the plan itself and not include any of the evaluation/monitoring).

End of Day 1

- EHR Information Sheet
    - ○ This should be run on any one resident and is to be provided to the survey team. Surveyors also require instructions on how to log in and use ECS. You can refer to the **Surveyor Training Handout** for these instructions.

Within 24 Hours

- 672 Census/Condition
    - ○ Once within the 672, click onto **Name(s)** and select all. Click **Print** to display the exact form surveyors request. Click onto **Print Triggers** to display all name(s) who were triggered in each column.