Preparing for Hosting the Accreditation Site Visit

While on site the surveyor may:
- Tour the facility
- Review client files (electronic or paper charts)
- Speak to patients, clients and their families (on premises or by phone)
- Speak to frontline staff and physicians
- Review documentation such as practice guidelines, manuals, referral forms etc
- Phone other partners involved in the traced patient/client/resident’s care

To help surveyors access the info they need for their tracers each site/unit/team/program may need to provide:
- A site host who knows the site and directs surveyors to people and documentation
- Access to 5 client files (electronic or paper charts) that represent the typical patient/client mix of the site
- Access to front line staff and physicians available to interact with surveyor
- Access to documentation upon request such as practice guidelines, manuals and forms
- A quiet space where surveyors can review files, make phone calls, eat lunch as needed

Site Host
- Receives the surveyor at their site/unit
- Knows the specifics of their site: volume, # staff, case mix…
- Provides the surveyor with access to client files (electronic or paper)
- Takes surveyor to front line staff members to interview
- Provides other documents as requested (i.e. manuals, forms..)
- Steps back and let surveyor direct the tracers

Access to Documentation
- No evidence binders, but…
- Surveyors may request additional info/access to documents at any time during the site visit
- Site Host to source documents for surveyor upon request
- Recommend that each site be ready to provide quick access to key documentation such as:
  - Transfer documents, assessment tools
  - Clinical Practice Guidelines
  - Training/orientation manuals
  - Indicator reports (i.e. hand hygiene, infections, med rec, pressure ulcers…)
  - Corporate policies and other resources (i.e. how to access Risk management, Ethics support…)