

VIRTUAL SURVEY GUIDE



TELEHEALTH



FOR PROVIDERS.
BY PROVIDERS.

Virtual certification surveys by Accreditation Commission for Health Care (ACHC) cover the same scope, quality, and review of standards, observations, interviews, and fulfillments as on-site surveys. The organization being surveyed must be in compliance with all ACHC Certification Standards and state licensure requirements.

You will receive an invitation to participate in a pre-survey Virtual Information Call (VIC) to assess your virtual survey technology resources, walk you through the virtual survey process, and give you guidance on technology requirements. The VIC will also outline what to expect in a virtual survey, virtual survey etiquette, and technology testing to ensure readiness. Advance preparation is essential to ensuring your survey is completed in a timely and efficient manner.

To participate in a virtual survey, you must meet all of the following requirements:

- A designated computer, with internet access, is available for virtual access to review organizational files and documents.
- The virtual application is installed on the designated computer and fully operational to allow live, remote screening of files and documents. Participants can also join directly through the survey invite link.
 - » To meet customer requirements, ACHC is using the HIPAA-compliant platform. This eliminates the ability to use call recording, chat, and transcription services during a meeting.
- A designated staff member is available throughout the entire survey to assist the Surveyor, provide all needed information, set up interviews, and conduct a live, virtual tour of the company location, including visual identification of the building and office space.
 - » To protect privacy, the virtual facility tour must be conducted without including client/patient and/or visitors on screen.
- A designated cell phone and/or tablet with a camera is available, or another approved virtual platform app, is installed and available for mobile, live screening during the survey. Another cell phone and/or tablet may be used if a second designated person also assists during the survey.
 - » If you call into the meeting on your phone and are also connected to the meeting on your computer, you must select "phone" as your audio choice to minimize interference.
 - » You must be able to connect via an approved platform, on a cell phone or other mobile device in the event of an internet or power outage.
 - A cell phone hot spot can be used for internet connectivity if an internet outage occurs.
- All required documents are stored or are accessible on the designated computer for remote viewing by the Surveyor on the day of the survey. Organizations must be able to display these documents using the virtual platform's screen-share option. Your Surveyor will not view paper documents held up to the camera on the day of the survey.
 - » See the "Items Needed for Survey" form for a complete list of items that will be reviewed during your survey. You can download the form from the customer portal, obtain it from your Account Advisor, or receive it after your pre-survey VIC. All items on

the form must be available in an electronic format and stored or accessible on the designated computer. Paper documents can be converted into an electronic form by scanning them into a folder/file stored or accessible on the designated computer. All electronic files must be labeled.

- » Examples of required documents are:
 - Required documents from personnel files for staff members.*
 - You will receive information about files that must be prepared before your survey.
 - If all required documents are already stored electronically and accessible via the designated computer, no further preparation is needed.
 - Electronic versions of staff schedules on the day of the survey.
 - Continuing education documents for staff members.*
 - Required documents from select client/patient telehealth files in a secure format.*
 - You will receive information about files that must be prepared before your survey.
 - If all required documents are already stored electronically and accessible via the designated computer, no further preparation is needed.
 - Other documents as indicated by ACHC during the pre-survey VIC.

Survey Day

On the day of the survey:

- Items that must be readily available for review on the day of the survey:
 - » Current schedule of client/patient visits set to receive telehealth services on the day of the survey, including start-of-care dates and admitting diagnoses/reason for telehealth visit.
 - » Current census of clients/patients receiving telehealth services, including start-of-care dates, admitting diagnoses, and a list of disciplines providing care/services.
 - » Personnel list, with titles, disciplines, and hire dates of those providing telehealth care/services.
 - » All required policies and procedures labeled with correlating ACHC standards.
 - » New telehealth client/patient packet.
 - » Performance improvement data, reports, and annual summaries (for the past three years, if a renewal survey).
- Make sure you have forwarded survey meeting invitations to all personnel participating in the survey. Provide a list of personnel attending the virtual survey to ACHC. The list must include names and titles of those attending.
- Know your staff's schedule and arrange for them to be available for interviews. Staff may be

asked to present a photo ID to the Surveyor.

- A closing conference will be conducted with personnel to discuss survey findings, any deficiencies, and next steps in the post-survey process.

* To ensure Health Insurance Portability and Accountability Act (HIPAA) confidentiality and security measures are maintained, no client/patient records or personnel files should be sent/emailed to ACHC.