



Tell Your Boss Takeaways from **“Surveyors - Friend or Foe”**

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Thesis: This session will outline some pre-survey preparedness processes that can lead to confidence and a successful survey. Accreditation bodies can arrive unannounced, and it is imperative to have processes in place to ensure you are always as well prepared as possible. With the on-going demands and increased responsibilities, MSPs may find themselves having to prioritize duties. Putting off audits that could potentially identify missing or bad data that will have you well prepared for surveys. Understanding the importance of being proactive and prepared will lead to confidence during a survey.

Learning Objective#1: Upon completion, participants will have a greater knowledge of the importance of frequent audits and data review.

Key points:

<ol style="list-style-type: none"> 1. Automated processes. 2. Software that can track expirables. 3. Policy and procedure manual. 	<ol style="list-style-type: none"> 4. Data management. 5. Analyze and research red
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Learning Objective#2: Upon completion, participants will have tools to assist with surviving the stress of on-site surveys, anxiety reducing techniques, as well as common emotional intelligence (EI) practices while communicating.

Key points:

<ol style="list-style-type: none"> 1. Practice makes perfect. 2. Confidence. 3. The power of body language. 4. Document repository. 	<ol style="list-style-type: none"> 5. Presenting information. 6. Knowledge of bylaws, rules/regs and policies.
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Learning Objective#3: Upon completion participants will be able to identify common mistakes and put into practice processes that will aid in future preparedness.

Key points:

<ol style="list-style-type: none"> 1. Record keeping (track and trend) 2. Provider files (does each file tell the story) 3. Power in random audits 	<ol style="list-style-type: none"> 4. Crosswalk 5. Educate Medical Leaders
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NAMSS
Surveyors - Friends or Foe
Survey Readiness Checklist
2024

Throughout the Year

1. Perform data file audits of commonly missed items such as reappointment dates, licensure, DEA, malpractice insurance, board certification, and other expirable documents.
2. Review the crosswalk that references the Medical Staff bylaws, rules/regs, and policy and procedures.
3. Educate Medical Staff Leadership on all things “credentialing and privileging”.

Day of Survey

1. When a surveyor arrives at the facility they should arrive at the main entrance. Whomever first greets them should identify them via photo ID and business card.
2. Escort surveyors to a designated meeting area and avoid them independently roaming throughout the facility.
3. Chief Executive Officer (CEO), Executive Assistants, and other Senior Leadership need to be notified immediately.
4. An overhead page should be made to announce the arrival of the survey team.
5. The Chief Medical Officer, Chief of Staff, Chair of the Credentials Committee, Department Chairs and other medical leadership need to be notified. Some facilities may have a group text notification or a mass email notification system. Utilize the script you have prepared.
6. Run an updated roster of all Active Medical Staff and Advance Practice Providers.
7. Participate in the opening session.
8. Once the surveyor has provided a list of provider files to be reviewed, review the file for any expired or missing items.
9. Review your survey readiness checklist for any last-minute items.

10. Include physician leader in your credential file review session. (CMO, COS, Credentials Chair)
11. Efficiently and confidently present your credential files.
12. Participate in closing session.
13. Remember you got this – it is a learning opportunity.
14. Reward you and your team for a job well done.