ACHC Town Hall

Private Duty Accreditation
Virtual Survey Option

Panelists

- Becky Tolson – Clinical Compliance Educator
- Barb Provini – Program Manager
- Catherine Sierra – Customer Experience Manager

ACHC Virtual Surveys

- Since the COVID-19 PHE, ACHC has developed and conducted virtual surveys as an alternative option to meet the requirements of accreditation.

- Quickly being accepted as a safe, convenient way for providers to meet accreditation requirements.

- Puts concerns over Surveyor travel and in-person contact to rest, reducing risk and allowing you to focus more on patient care and business operations.

- Cover same scope, quality, and review of standards, observations, interviews, and fulfillments as on-site surveys.

- ACHC has successfully conducted numerous virtual surveys.

- ACHC is still conducting on-site surveys.

ACHC Private Duty Virtual Surveys

- Initial and renewal Private Duty accreditation
  - Available in a majority of states
  - Exceptions
    - TX & FL (PDN) – unannounced surveys
    - IN, OH, NJ – Medicaid providers

- Licensure surveys permitted
  - CA & FL

ACHC®

ACHC Virtual Survey Process

- Discuss virtual survey option with assigned Account Advisor (AA)
- Complete accreditation agreement amendment, as applicable
- AA will provide checklist tools and webinars for survey prep
- Virtual Survey Coordinator will contact provider to schedule a pre-survey Virtual Information Call
  - VIC determines capabilities
  - Discusses necessary preparation
- Provider put into scheduling
- Provider emailed a scheduled virtual survey invitation (date/time/link to join)
- Surveyor makes notification call day of survey

Virtual Information Call (VIC)

- Virtual platform tutorial/testing
  - Go To Meeting
  - Tutorial available: https://youtu.be/rxQP3hxA1rY.

- Connectivity

- Video and audio capabilities

- Review of survey prep tools

- Answer questions

ACHC®

ACHC Virtual Survey Prep

- Requirements to be met:
  - Designated computer (desktop/laptop)
    - Internet access available for virtual access to all agency files and documents
    - Working web camera and microphone
    - Go To Meeting application installed and fully operational to allow live, remote screening/sharing of files and documents
  - Designated mobile device (cell/tablet)
    - Internet access
    - Working web camera and microphone
    - Go To Meeting application installed

ACHC®

ACHC Virtual Survey Prep

- Requirements to be met:
  - Designated staff member available throughout entire survey
  - Ability to connect to GTM via phone in the event of an internet outage
    - Must select 'phone' as audio option when calling into the meeting but also connected via computer
  - Ability to upload & store all documents required for survey on designated computer for remote viewing by ACHC Surveyor
  - Required documents include:
    - Required P&P. Must be labeled with correlating ACHC standards
    - Required documents from personnel files per Personnel File Checklist
    - Required documents from client/patient records in secure format
    - Other documents as required for type of survey (Items Need for Survey checklist)

Positive Feedback

- Entire agency team (corporate/local) can log-in to take part in the survey process
- Agencies find it efficient to perform a self-audit prior to survey as they scan in all of their information/documents
    - Items uploaded in one place
- Transparent process
    - Information/documents reviewed with agency staff present
    - Able to see in real time what the surveyor is reviewing
- Agencies have reported the ability to:
    - Understand the standards and survey process with more clarity, detail and efficiency
    - Use the tools ACHC provides
    - Feel more in command of what they are presenting during the survey

ACHC®

Tips for a Successful Virtual Survey

- Same device used for VIC should be used day of survey
  - Connection issues trying to log in with new device

- Download and log-in through the GTM application on devices
  - Going through website causes major connection issues with audio, video, and surveyor's remote access

- Have two separate devices
  - A desktop/laptop designated for surveyor to utilize (one monitor if possible)
  - One for staff to work form during survey process

- Ensuring all items/documents are scanned in prior to survey
  - Refer to Items Need list
  - Scanning delays review time

- Designate device used for home visit and test it prior to survey

- Have IT person/team available day of survey
  - Firewalls in place for security can sometimes limit/block surveyor's remote access. Sometimes not discovered until day of survey

ACHC®

Questions & Discussions

FOR PROVIDERS.
BY PROVIDERS.

ACHC®

ACHC®

Thank you

Accreditation Commission for Health Care

139 Weston Oaks Ct., Cary, NC 27513

(855) 937-2242 | achc.org