

CHAP Site Visit Overview

The CHAP Site Visit is a data-driven, patient-centered survey that provides a comprehensive picture of an organization's performance in its first years of accreditation and over time. CHAP's experienced and well-trained Site Visitors evaluate an organization's actual care processes and provide guidance to support an organization and its efforts to continually improve. While CHAP is firm, and our standards are rigorous, we don't feel that the survey process should be adversarial or punitive. We want you to view the Site Visit as a great opportunity for your organization to learn and grow.

CHAP Site Visitors

CHAP is an organization comprised of home and community-based care professionals who are experienced and knowledgeable about home health, hospice, HME, private duty, infusion therapy nursing, pharmacy and public health services.

CHAP Site Visitors are all seasoned and tenured clinicians who understand the nuances of home and community-based health care. Organizations benefit from the objective, third-party oversight of clinicians who have the experience, education and expertise in the fields that they survey.

Through regular in services and training, we work to ensure reliability in each service line and across services. Our goal is to ensure consistency of the survey process so that our Site Visitors can work with our customers to focus on improving their operations and patient care.

That's CHAP. And that's our promise to you.

www.chapinc.org | www.chapeducation.org | www.chaplinq.org



Document Request Checklist

The CHAP Document Request Checklist is a comprehensive list of required documents for the initial and renewal (triennial) site visit. List varies for Focus, Complaint, Change of Ownership and added services (HME only) site visits.

Items Requested (All Service Lines)

- Policy and Procedure Manual
- Sample admission packet
- List of unduplicated admissions (new patients) for past 12 months
 - Include diagnosis and start of care date
 - For HME and Pharmacy – type of equipment/service
- List of personnel for past 12 months
 - Include title/position and date of hire
- List of governing body membership
 - Include positions on Board
 - Annual Conflict of Interest statements
 - Minutes of governing body meeting
- Bylaws/Articles of Incorporation, if applicable
- Mission Statement including date of last review
- Most recent Strategic Plan
- Most recent Annual Evaluation conducted for the organization
- List of contracts
- Operating budget
- Capital Expenditure Plan

- Insurance coverage and surety bond – if applicable
- Most recent Annual External Review of financial statements
- Performance Improvement Plan
- Professional Advisory Committee (PAC) minutes and membership for past 12 months (Not required for HME)
- Copy of schedule of home visits/deliveries/setups for the next two (2) days
 - Patient names, visit type, discipline visiting patient and diagnosis
- Copy of the following for past 12 months:
 - Clinical Record Audit results and trends
 - Adverse Events Incidents and Complaint trends
 - Patient Satisfaction Survey results and trends
 - Any additional performance improvement indicators and/or action plans
 - State or regulatory survey reports

Additional Items Requested (Service Specific)

- OBQI outcome reports for past 12 months (Home Health)
- OBQI case mix report for past 12 months (Home Health)
- Volunteer hours tracked and trended for past 12 months with cost saving (Hospice)
- Billing and coding error reports (DMEPOS-HME/Pharmacy)

