

Home Medical Equipment Document Request List

Note: This is a guideline. Additional information may be requested depending on the Scope of Services (discipline/services provided).

Standard	ITEMS	COMMENTS	Requested	Provided
	General Documents			
NA	# of Clients Served	New clients for the past 12 months		
NA	List of Clients provided product or services within last 12 months	Include SOC, DX, Services		
NA	List of scheduled Visits/Deliveries			
NA	List of Personnel Active/Term Direct	Include DOH, Title/Discipline		
NA	List of Contract Staff			
CII.2 HMEII.2	Scope of Products /Services	Rx as applicable		
CIII.2 HMEIII.2	All Contracts	Includes interpreter		
CII.1 HMEII.1	Sample Setup Folder	RX as applicable		
	Quality Documents			
CII.6 HMEII.9	Performance Improvement Activity/Projects	Last 12 months		
HMEII.9	Performance Improvement Meeting Minutes	Last 12 months		
CII.6f	Patient Experience Surveys			
CII.8 HMEII.12	Complaint and on-call logs			
	Recent survey results as applicable	Visit from State or Federal agency since last Comprehensive visit		
CIV.2	Recent Annual Evaluation			
	Policies and Procedures			
CI.5 HMEI.5	Policy Manuals to include Including handwashing and bag technique policy	Service Specific		
	Governance Documents			
CI.2	List of Governing Body members and positions			
CI.2	Annual Conflicts of Interest of Statements			

Standard	ITEMS	COMMENTS	Requested	Provided
CI.4	Bylaws/Articles of Incorporation			
CIV.1	Strategic Plan			
CI.4	Governing Body meeting minutes			
CI.2 HMEI.2	State, Business Licenses	As Applicable		
CI.1	Mission Statement			
	Financial Documents			
CIII.3 HMEIII.3	Capital Expenditure Plan			
CIII.3/ HMEIII.3	Operational Budget			
HMEI.2	Insurance Coverage/Surety Bond	Includes Rx with HME Service		
CIII.3	Last Financial Statement Review (External)			
HMEII.9	Billing/Coding Error Reports			
	Operational Documents			
CI.3	Organizational Chart			
CIII.1	Job descriptions			
CII.3 HMEII.3	Emergency Preparedness Plan			
CIII.1 HMEIII.1	Orientation Program			
CIII.1 HMEIII.1	Clinical Competency Documentation			
CIII.1 HMEIII.1	Annual In-service Education Provided			