

Home Health Document Request List

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

Standard(s)	Item	Comment(s)	Requested	Provided
	General Documents			
NA	Unduplicated Admissions/Clients Served	New patients for the past 12 months		
NA	List of Active Patients	Include Admit Date, Diagnoses, Clinical Disciplines		
NA	List of Discharged Patients	Past 30 - 60 days		
NA	List of Scheduled Visits			
NA	List of Personnel - Active/Terminate	Include Date of Hire, Title/Discipline		
NA	List of Contract Staff			
LG.12.D	All Contracts	Include Interpreter		
	Sample Admission Packet			
IPC.1.D.M1	Bag Technique Policy			
IPC.1.D.M1	Handwashing Policy			
NA	Billing Week			
	Quality Documents			
CQI.1.1.M1	QAPI Meeting Minutes			
	Patient Experience Surveys			
CQI.5.1.M1	Performance Improvement Projects			
CQI.3.I	CMS Outcome Reports/Adverse Events/OASIS Error Summary			
CQI.3.1.M2	Quality Indicator Tracking Data			
CQI.3.1.M2	Complaint log			
NA	Recent Survey Results	As Applicable, since last Comprehensive visit		

	Item	Comment(s)	Requested	Provided
	Policies and Procedures			
See Policy List	Policy Manuals	Service Specific		
	Governance Documents			
LG.4.I.M1	List of Governing Body members and positions	As Applicable		
LG.4.I	Governing Body meeting minutes			
LG.3.I.M1	State and/or Business License(s)	As Applicable		
	Financial Documents			
FS.2.I.M4	Capital Expenditure Plan			
FS.2.I.M3	Operational Budget			
	Operational Documents			
LG.11.D.M1	Organizational Chart			
HRM.7.I.M5	Aide Training Program	As Applicable		
LG.3.I.M3	CLIA Certificate(s)	As Applicable		
EP.1.D.M1	Emergency Preparedness Plan			
HRM.7.I	Clinical Competency Documentation	For each discipline		
IPC.7.I.M1; HRM.6.D.M2;	Annual In-service Education Provided			