

Home Care Document Request List

Note: This is a guideline. Additional information to include State specific requirements (as applicable) may be requested at any time during the site visit.

***Denotes policies/documents to be provided within first 2 hours of site visitor arrival**

Standard	Item	Comments
	General Documents/Information	
	*Billing Week	(IE; Week starts Sunday or Monday per agency policy)
HCCC.3	*Scope of Services	Identifies the services available and accessible to patients.
	*Clients Served	New clients within the past 12 months
	*List of Active Clients	Include date services started, DX, services provided
	*List of Discharged Clients	Termed within the last 30-60 days
	*Current Visit Schedule	
	List of Personnel Active/Termed	Include DOH, Position/Discipline
	Contracts	List of contract staff and interpretive services
HCCC.1 HCEP.3 HCCC.3	Sample Admission Packet	Include language specific documents
	Quality Documents	
HCCC.1 HCCC.6	Complaint logs/on-call logs	
HCQA.1 HCQA.2	Performance Improvement Activity/projects	(IE: Quality Indicator Tracking Data; Client Satisfaction Surveys; Infection Control Surveillance)

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	Most Recent Survey Results	From local, State or federal agency
	Policies and Procedures	
HCCC.5 HCCC.6 HCIC.1 HCIC.4 HCIC.6 HCMG.1 HCMG.7 HCMG.8	Policy manual(s) <ul style="list-style-type: none"> • Service Specific Policies • Human resources • Administrative • Operational • Clinical 	Infection Control, *Hand washing and bag technique policy;
	Governance Documents	
HCMG.1	Governing Body-Person(s) who assume full legal authority over the organization.	
HCMG.2	*Service or Business License per State requirement	
	Operational Documents	
HCGM.5	*Organizational Chart	
HCMG.7 HCPS.13 HCPC.12 HCCE.12	Orientation Program	As applicable per state
HCPC.12 HCMG.8 HCPS.13	Clinical Competency Documentation	For each staff type/ discipline
HCEP.1	Emergency Preparedness Plan	All elements of the standard including implementation and testing.