

**Health Center Name**  
**HCO #**  
**Unified Joint Commission and BPHC Ambulatory Care Survey**

**Information Needed for Preliminary Planning Session and Survey Planning Session**

- An organization chart
- Performance Improvement data from the past 12 months (4 months for initial survey)
- Infection Control surveillance data from the past 12 months (4 months for initial survey)
- Environment of Care information:
  - Management Plans and annual evaluations, if applicable
  - Environment of Care team meeting minutes
- Description of the committee structures of both the Board of Directors & staff
- Map of the organization’s patient care delivery site(s), if available
- List of services provided at each site
- Any reports or lists of patients (e.g., appointment schedule) that will help in identifying patients to trace
- Name of key contact person who can assist in planning tracer selection

**Bureau of Primary Health Care (BPHC) Related**

- List of Board of Directors by background and consumer/non-consumer status (Form B, BPHC application)
- Completed BPHC Health Center Self-Report Tool
- Most recent BPHC Notice of Grant Award (include any conditions or management assessment items)
- Items from your most recent BPHC Grant Application:
  - a) Health Care Plan      b) Scope of Services      c) Overall Summary (if available)
- Current organizational improvement plans (note: may also be called quality or performance improvement plans)
- CHC Board & Executive Committee minutes: resurvey - most recent 12 months; initial – most recent 4 months

**DAY 1**

Time	Clinician Surveyor	Administrator Surveyor
8:00 – 8:30 a.m.	Surveyors’ Arrival and Preliminary Planning Session	
8:30 – 9:00 a.m.		
9:00 – 9:30 a.m.	Opening Conference and Orientation to Organization	
9:30 – 10:00 a.m.		
10:00 – 10:30 a.m.	Surveyors’ Planning Session - Continued	
10:30 – 11:00 a.m.	Individual Tracer Activity	Individual Tracer Activity
11:00 – 11:30 a.m.		
12:00 – 12:30 p.m.	Surveyors’ Lunch	
12:30 - 1:00 p.m.	Individual Tracer Activity	Individual Tracer Activity
1:00 - 1:30: p.m.		
1:30 – 2:00 p.m.		
2:00 – 2:30 p.m.		
2:30 – 3:00 p.m.		
3:00 – 3:30 p.m.		
3:30 – 4:00 p.m.	Special Issue Resolution	
4:00 – 4:30 p.m.	Surveyor Team Meeting / Planning Session	

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**DAY 2**

Time	Clinician Surveyor	Administrator Surveyor
8:00 – 8:30 a.m.	Daily Briefing	
8:30 – 9:00 a.m.	Individual Based System Tracer – Data Use	
9:00 – 9:30 a.m.		
9:30 – 10:00 a.m.	Individual Tracer Activity	Individual Tracer Activity
10:00 – 10:30 a.m.		
10:30 – 11:00 a.m.		
11:00 – 11:30 a.m.	Individual Based System Tracer	Governance Discussion Session <sup>2</sup>
11:30 – 12:00 p.m.		
12:00 – 12:30 p.m.	Surveyors' Lunch	
12:30 – 1:00 p.m.	Team Meeting / Planning Session	
1:00 – 1:30 p.m.	Individual Tracer Activity	Individual Tracer Activity
1:30 – 2:00 p.m.		
2:00 – 2:30 p.m.		
2:30 – 3:00 p.m.	Clinical Leadership & Staff Discussion Session <sup>3</sup>	
3:00 – 3:30 p.m.		
3:30 – 4:00 p.m.	Special Issue Resolution	
4:00 – 4:30 p.m.	Team Meeting / Planning Session	

**DAY 3**

Time	Clinician Surveyor	Administrator Surveyor
8:00 – 9:00 a.m.	Leadership Session	
9:00 – 9:30 a.m.	Individual Based System Tracer	Individual Tracer Activity
9:30 – 10:00 a.m.		
10:00 – 10:30 a.m.	Individual Tracer Activity	
10:30 – 11:00 a.m.		Environment of Care Session
11:00 – 11:30 a.m.		
11:30 – 12:00 p.m.		
12:00 – 12:30 p.m.	Surveyors' Lunch	
12:30 – 1:00 p.m.	Competence Assessment Process	
1:00 – 1:30 p.m.		
1:30 – 3:30 p.m.	Report Preparation <sup>4</sup>	
3:30 – 4:00 p.m.	CEO Exit Briefing	
4:00 – 4:30 p.m.	Organization Exit Conference	

Please Note:

1. See the Survey Activity Guide for more details regarding each activity noted on agenda.
2. Participants in the Governance Discussion Session should include at, a minimum: the chairperson/president or vice-chair/vice president of the governing body; treasurer or chair of the finance committee; and another user/individual/consumer board member, if one of the above officers is not a user/Individual/consumer. The governing body chairperson/president at his/her discretion may invite the Executive Director/CEO to attend the meeting. Participation may be by conference call. There is flexibility in the exact time of day for this session.
3. Clinical Leadership/Staff Discussion Session participants should include a cross-section of providers including physicians, dentists, other licensed independent practitioners, nurses, social workers, and other categories of staff who provide direct care to Individuals. At a minimum, the group interview should include: Clinical Leadership, one licensed independent practitioner, and a clinical staff member from each remote site which is not scheduled for a site visit; and/or other clinical staff members who might not otherwise have an opportunity to participate in the survey process. There is flexibility in the exact time of day for this session.
4. Report Preparation time includes integration of Joint Commission and BPHC Statutory Requirements-related findings.

12/06