

SBRHA Site Review Survey Checklist

You can use this form to assure that your office meets survey requirements. Check column at left when you verify requirement. A resource packet of information is also available. To obtain resources, or if you have questions about the survey; contact Paula Curran at 1-800 421-2560, extension 253.

√

	Access/Safety
	Access to building is adequate, evidenced by reasonable parking and/or feasible public transportation within walking distance.
	Accommodations for persons with disabilities are available, evidenced by designated parking, loading zone, and/or public transportation within close proximity to the building.
	a. external ramp (if applicable)
	b. automatic entry option or alternative access method
	c. elevator for public use (if applicable)
	d. restroom equipped with large stall and safety bars or other reasonable accommodation
	Exit signs are clearly visible.
	An Evacuation plan is posted in a visible location.
	Fire protection equipment (fire extinguisher, smoke detector, fire alarm, or sprinkler system) is accessible and in working order.
	Emergency medications (injectable epinephrine, benadryl) are available on-site. (not outdated)
	There is a procedure for the management of non-medical emergencies (i.e., earthquakes).
	There is a procedure for handling medical emergencies appropriate to the patient population.
	Personnel
	There is evidence that staff receive orientation/training about policies and procedures relevant to their job description.
	Appropriate licensure or certification is current and available (as applicable for RN, NP, LVN, PA, MA).
	Standardized protocols are in place for all physician extenders (as applicable).
	Staff signs Confidentiality Agreements at time of hire.
	Office Management
	Office hours are posted or are available on request.
	There is provision for 24 hour, 7 day per week coverage for medical care.
	The average number of patients scheduled per day does not exceed 5 per hour (6 pediatric patients per hour).
	There is access to interpreter services for patients with limited English proficiency and those with hearing impairments.
	The average wait time is less than 30 minutes from the scheduled appointment time.
	Urgent visits are scheduled within 24 hours.
	Non-urgent appointments are scheduled within 7 calendar days.
	Preventive exam appointments are scheduled within 30 days.
	There is a policy to follow-up on missed appointments.
	There is a policy for compliance with HIPAA privacy regulations including evidence that the disclosure of privacy practices is signed by patient and posted.
	Medical Records
	Medical records are secured from patient and public access and are restricted to identified staff.
	Medical record release procedures are compliant with State and federal regulations.
	Patient records are available for each encounter.
	There is an individual record for each patient.
	Forms and methodology for filing within a chart is consistent.
	Allergies and reaction or NKA are clearly indicated on each chart.
	Discussion about advanced directive is documented for patients older than 18.
	The patient name appears on each sheet in the chart.
	There is a date and signature or initial on each entry/report in the chart.

* **Bolded items are critical elements and require correction within 10 days.**

	There is a procedure for documenting MD review and patient notification prior to filing lab, x-ray and other reports in the chart.
	There is a procedure for documenting patient phone communications.
Clinical Service	
	The following should be kept locked and inaccessible to patients; Prescription pads, Needles and Syringes, Medications (including sample drugs).
	Narcotics are stored in a secured locked cabinet accessible to only authorized licensed personnel with a current inventory maintained for each controlled substance.
	Medications (including samples) are checked monthly for expiration dates.
	There is a policy for disposal of expired medications.
	Refrigerator thermometer temperature is maintained and documented daily at 35°-46° Fahrenheit.
	Freezer thermometer temperature is maintained and documented daily at 5° Fahrenheit if varicella vaccine is present.
	Drugs are stored in a separate refrigerator from food and drinks.
	CLIA certificate number or CLIA Waiver is current (if applicable).
	<ul style="list-style-type: none"> ○ Indicate certificate number and expiration date here:
	<ul style="list-style-type: none"> ○ Indicate CLIA Waiver issue and expiration dates here:
	X-ray technician license(s) is current. (Not applicable if no X-ray equipment on site.)
	<ul style="list-style-type: none"> ○ Indicate license number(s) and expiration date(s) here: ○ X-ray equipment maintenance documentation is current.
Preventive Service	
	There are at least 2 exam rooms per doctor on duty, or alternative procedure to minimize waiting time between patients.
	Exam rooms are neat and clean and have exam tables with protective barriers.
	The office has age-appropriate equipment, including but not limited to:
	<ul style="list-style-type: none"> ○ weight scale ○ length/height measuring devices ○ sphygmomanometer ○ thermometer ○ exam gowns ○ eye chart
	At least one exam room can accommodate physically challenged patients.
	Health education materials are available for patients and are:
	<ul style="list-style-type: none"> ○ age appropriate for the patient population ○ language appropriate for the patient population
Infection Control	
	Autoclave processes are documented including routine maintenance (inspection dates, service results, calibration, repairs, etc.)
	<ul style="list-style-type: none"> ○ Monthly spore checks
	Cold chemical sterilization process are documented:
	<ul style="list-style-type: none"> ○ Solutions changed weekly ○ Containers dated ○ Solutions used must kill HIV, HBV, TB (should be indicated on label) ○ Solutions used according to product label
	Specimens requiring refrigeration are stored in sealed containers and separated from drugs.
	There is a needle disposal system available.
	There is a policy for the handling of biohazardous waste.
	There is a contract or written agreement for the secured disposal of biohazardous waste.
	Biohazardous waste is stored in rigid leak resistant containers.

* **Bolded items are critical elements and require correction within 10 days.**