Telehealth Accreditation

Organization
Survey Activity Guide

2025

Issue Date: December 23, 2024

PRIOR TO THE SURVEY

Survey Readiness Guide

Actions to take when the surveyor arrives on Teams call	Responsible Staff	Comments
Greet surveyor		
Check the *Joint Commission Connect* extranet site for notification of survey event		Be sure to designate someone to access your organization's *Joint Commission Connect* extranet site.
Verify identity of the surveyor		Check the picture ID to ensure that they are from The Joint Commission. Also log into your *Joint Commission Connect* extranet site to validate the surveyor's identity, when possible.

Note: Please download the entire Survey Activity Guide for additional information on how to prepare for survey.

Please review the Survey Document List and the Survey Activity List to assist you in preparing for your survey.

- The Survey Document List has a list of documents that your organization will upload to a secure Joint Commission site prior to the survey and a list of documents to have available for the surveyor to review during the survey.
- The Survey Activity List includes the potential survey activities that can occur during the telehealth accreditation survey, including the suggested duration and suggested timing for these activities. This information will allow your organization to begin identifying participants that need to be involved in the survey. There is also a table for your organization to use to record participant names, times that could conflict with participant availability, or any other notes. Please work with your surveyor to confirm the best time(s) for specific survey activities to take place.

Please contact your Account Executive with any questions related to this information.

Survey Document List

Overview
Your organization will need to have the following documentation available for the surveyor to review prior to the survey and during the Surveyor Arrival and Preliminary Planning Session.

Please note that this is not intended to be a comprehensive list of documents that may be requested during the survey. The surveyor may need to see additional documents to further explore or validate observations or discussions with staff.

Prior to the Survey
The following documents need to be uploaded to a secure Joint Commission site prior to the survey.

Item No.	Items	Comments/ Notes
1	Organization c K D U W ×	
2	Leadership meeting minutes (also safety committee, quality F R P P L W W H H D V D S S O L F D E O H ×	
3	Performance improvement / quality management plan	
4	Performance improvement / quality evaluation data or planned data to be collected (i.e., × S H U I R U P D Q F H P H D V X U H V R X W F R P H G D W D P H G L F D variance, incident report related data, satisfaction survey related data, etc.)	
5	Emergency management plan	
6	Hazard vulnerability analysis (or other method used to identify most likely, potentially most impactful emergencies)—include specifics for sites that have unique risks not included in the master assessment or HVA	
7	Evaluations of exercises and responses to actual emergencies	
8	Any policies for care of patients/individuals served	
9	IT security/safety plan and applicable policies	
10	Medical equipment documentation (if applicable)	
11	Service	

During the Survey

The following documents need to be available for the surveyor to review during the survey.

Item No.	Items	Comments/ Notes
1	Contact person(s) who will assist the surveyor(s) during survey Q D P H S K R Q H Q X P E H U H [W H Q V L R Q × Q D P H V W L W O H V R I V W D I off-site V X U Y H \ H Y H Q W ×	
2	An organization chart	
3	List of all sites that are eligible for survey	
4	List of locations where services are provided	
5	Any reports or lists of patient/individual appointment schedules for the day of the survey	
6	Lists of patients/individuals served by program/service with diagnosis or condition	
7	Name and extension of key contacts who can assist surveyors in planning tracer selection	
8	A list of contracted services provided to the telehealth organization	
9	For organizations that provide care, treatment, and services to another organization's patients/individual service: A copy of the written contract/agreement/policy regarding the care, treatment, and services provided via telehealth to another organization's patients/individuals served.	
10	Most recent culture of safety and quality evaluation data	
11	For telebehavioral organizations: Reports or recommendations from external authorized agencies, such as accreditation, certification, or regulatory bodies and annual objective evaluation of organization's financial ability to provide care, treatment, or services. Regulatory body reports include but are not limited to licensing reports.	

Survey Activity List

Overview
The following table outlines

Opening Conference

Participants
Suggested participants include members of the governing body and senior leadership (representing all accredited services). Attendees should be able to address leadership's responsibilities for planning, resource allocation, management, oversight, performance improvement, and support in carrying out your organization's mission and strategic objectives. Leaders of the medical staff should also take part, when applicable.

Duration
The suggested duration of this session is approximately 15 minutes. Immediately following this session is the Orientation to Your Organization session.

- Provision of staff and resources including time, information systems, data management, and staff training
- For telebehavioral organizations: How the organization is addressing the requirement (PC.02.05.01) to use a standardized tool or instrument to measure outcomes

Note: The surveyor will request examples of performance improvement initiatives including evidence that performance was achieved and sustained.

- Patients/individuals that have received a medical device or are using their own medical device for remote monitoring.
- Patients/individuals that have been recently discharged from the organization.
- Patients receiving care, treatment, or services related to the organization's annual antimicrobial stewardship goal.
- Patients that have been prescribed an opioid medication.
- For telebehavioral organizations: An individual who is at high risk for suicide
- For telebehavioral organizations: Individuals served that have been admitted from or discharged to an outpatient service

During the individual tracer, the surveyor will interview staff about:

- Communication for coordination of patient care (intradepartmental, interdepartmental, between organizations).
- Data collection, e.g., turnaround time, wait time, determine if improvements in flow have been made
- Project-level performance improvement work
- Processes and role to minimize risk
- Patient/individual education processes
- Orientation, training and competency testing
- Emergency management roles and responsibilities
- Compliance with the National Patient Safety Goals (NPSGs)
- The IM systems they use for care, treatment and services

During the individual tracer, the surveyor will interview patients/individuals and their families about:

- Coordination and timeliness of services provided
- Education, including information about the technology used to receive care, treatment, and services via telehealth (such as the software platform, medical equipment, or medical devices)
- Perception of care, treatment, or services
- Understanding of discharge instructions
- Staff compliance with NPSGs
- Other issues, relative to receiving care, treatment, or services via telehealth
- Receipt of patient/individual rights information

Special Issue Resolution

Participants
As requested by the surveyor

Duration
This activity only takes place, as necessary. The suggested duration is approximately 30 minutes. The surveyor will inform your organization's contact person what activity will take place, with more time added as needed to complete required evaluation activities.

Overview
This time is available for the surveyor to explore any issues that may have surfaced during the survey and could not be resolved at the time they were identified (staff unavailable for interview, additional file review required, etc.). Depending on the circumstances, this may include:

- The review of certain policies and procedures
- The review of additional patient/individual records to validate findings
- Discussions with staff to obtain additional information or clarification
- Review of staff and credentials files
- Review of data, such as performance improvement results
- Other issues requiring more discussion

The surveyor will inform your organization's contact person about any additional documentation or staff interviews needed.

- Staff and leaders' participation in exercises of the Emergency Management Plan and evaluations of the exercises.

Data Management Session

Leadership Session

Participants
Suggested participants include senior leaders who have responsibility and accountability for design, planning, and implementation of organization processes. Leaders typically include but are not limited to members of the governing body/trustee, CEO, and leaders of the medical staff and clinical staff.

Duration
The suggested duration of this session is approximately 60 minutes, with more time added as needed to complete required evaluation activities.

Overview
During this session, the surveyor will explore leadership's responsibility for creating and maintaining your organization's systems, infrastructure, and key processes which contribute to the quality and safety of care, treatment, or services.

This session will address:

- Leadership commitment to improvement of quality and safety
- Creating a culture of safety
- Robust process improvement
- Observations that may be indicative of system-level concerns

The surveyor will facilitate a discussion with leaders to understand their roles related to performance of your organization-wide processes and functions. This discussion will be a mutual exploration of both successful and perhaps less successful organization performance improvement initiatives, or introduction of a new service or an optimal performing department, unit or area vs. one in need of improvement. The surveyor will want to hear how leaders view and perceive these successes and opportunities and learn what they are doing to sustain the achievements, as well as encourage and support more of the same success.

The surveyor will discuss the following topics:
le6>Bod32.6 (o)11.3 (on)10surveyor

Surveyor Report Preparation

Participants
Surveyor

Duration
The suggested duration of this session is approximately 60-90 minutes.

Overview
During this session, the surveyor will compile, analyze, and organize the data collected during the survey. The surveyor will use this information to develop a Summary of Survey Findings Report that includes your organization's Requirements for Improvement (RFI). This report will summarize your organization's compliance with the standards. The surveyor will provide you with the opportunity to present additional information at the beginning of this session if there are any outstanding surveyor requests or further evidence to present.

CEO Exit Briefing

FOLLOWING THE SURVEY

After Your Joint Commission Survey

Your off-site survey is an important part of the accreditation decision-making process. During the off-site survey, your surveyor uses the tracer methodology and other survey techniques to identify and document

Resources

- The *Joint Commission Connect* extranet site can be accessed using a login and password (www.jointcommission.org). Please refer to the following information under the “Post-Survey” section:
  - Evidence of Standards Compliance
  - Publicity Kit
  - Evaluations
  - Certificates
- Your Account Executive is available to assist you with any questions that you may have about the post-survey process.

APPENDIX

Program Specific Tracer (Telebehavioral Organizations) – Suicide Prevention

Organization Participants
Staff and management who have been involved in the care, treatment, or services of the individual served.

Logistical Needs
This focused tracer occurs during time designated for Individual Tracer Activitr Act Logiservganoi SÍ T-5 Tm3 EMC /

This page intentionally left blank.