

- Review of policies, procedures, clinical practice guidelines, medical records, staff records, governmental and/or regulatory compliance reports, and other documents requested from the hospital
- Review of quality and patient safety improvement data, performance measures, and outcomes
- Individual *patient tracers* (that is, evaluation of a patient's care experience through the hospital care process)
- *System tracers* of organizationwide processes (for example, medication management, infection prevention and control, hazardous materials, and waste, or other high-risk, high-/low-volume, problem-prone systems, and processes)

## **Preparing for Survey**

JCI assigns each hospital an account manager to serve as the primary contact between the hospital and JCI. This individual assists in the coordination of the presurvey activities and is available to answer questions about the following:

- Application submission and receipt, contracting, and scheduling
- Official Survey Findings Report processing and Strategic Improvement Plans
- Status of accreditation and certification certificates
- Notifying JCI of significant changes in your organization, including how to update information in *JCI Direct Connect* and the E-App
- General JCI policies and practices and the survey process
- Concerns regarding any of JCI's processes

## **Scheduling the Survey**

JCI and the hospital select the survey date and prepare the survey agenda together to meet the hospital's needs and the requirements for an efficient survey. To reduce surveyor travel costs, JCI makes every effort to coordinate the scheduling of surveys of other hospitals in a specific country or region.

## **Planning the Survey Agenda**

JCI assigns each hospital a Team Leader to assist in the coordination of the survey agenda planning. The Team Leader will contact the hospital approximately eight weeks in advance of the survey to coordinate logistics for the survey and prepare a survey agenda based on the size, type, and complexity of the hospital. The agenda specifies the sites JCI surveyors will visit, the types of interviews surveyors will conduct, the staff to be interviewed, and the documents that must be provided to the surveyors.

## **The Survey Team**

Highly qualified and experienced international surveyors perform the survey. JCI conducts surveys in the English language; however, JCI makes every effort to use surveyors fluent in the language(s) used at the organization. If JCI surveyors with the appropriate language capabilities are not available, it is the responsibility of the surveyed organization to provide qualified translators who are free from conflict of interest. A typical hospital survey team consists of a physician, nurse, and hospital administrator.

## **Cancellation of a Survey**

JCI or a hospital may cancel a survey without penalty or damages when events such as wars, terrorism, or other similar emergencies or circumstances make it impossible, illegal, or unreasonable to go forward with a survey. Cancellation due to any of the reasons cited above must be communicated in writing as soon as possible. If the hospital cancels the survey thirty (30) or fewer days prior to the start date of the survey for any reason or reasons other than those stated above, JCI will require payment of all associated direct costs plus a cancellation fee as outlined in the signed contract. If a hospital cancels the survey more than once after the survey dates are confirmed via e-mail by JCI, JCI will also require a rescheduling fee. This rescheduling fee will increase for