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The COVID-19 Focused Survey

An Overview

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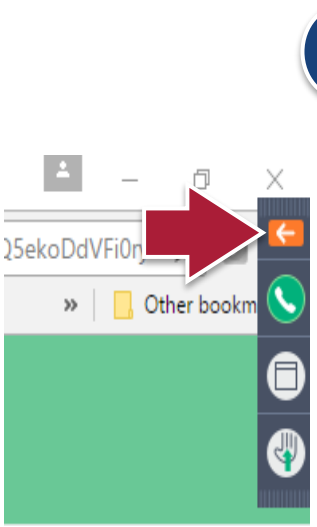

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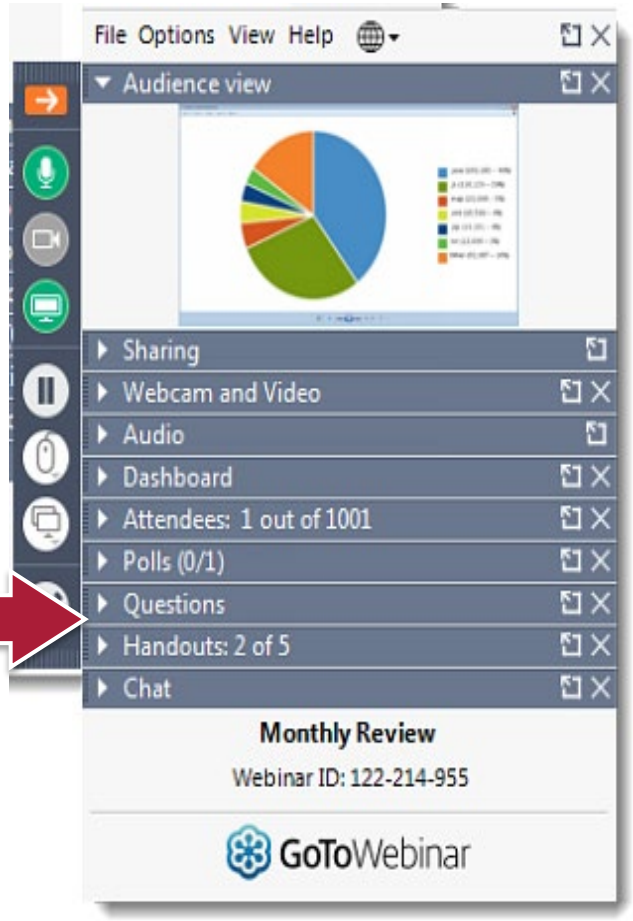

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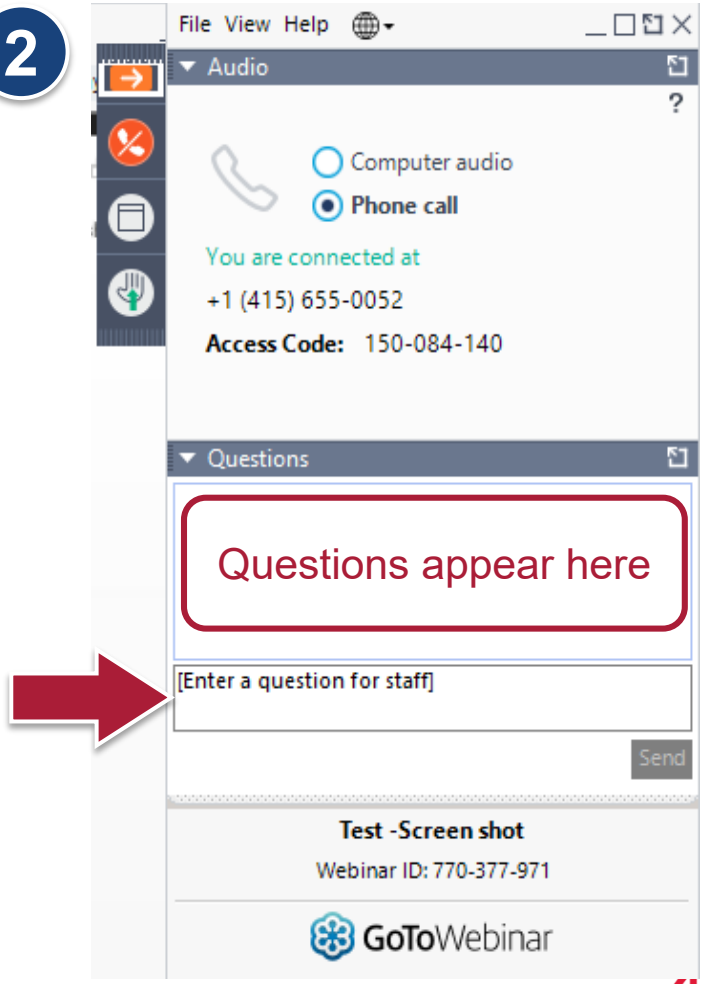

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Your Team Today..

Greg Seiple, RN
Vice President – Informatics
support@teamtsi.com
Direct Line: (256) 878-2121

Hugh Heaton
Regs-In-A-Flash, LLC
whheaton@regsinaflash.com
Direct Line: (256) 281-6433

Team TSI Support
support@teamtsi.com
(256) 878-2121
(800) 765-8998

Dahlia Kroth
Vice President – Strategic Relations
dahlia@teamtsi.com
Direct Line: (256) 279-6801

Q&A - Kelsea Little
Kelsea.little@teamtsi.com
(256) 279-6777

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Today's Session Goals

- Provide an overview of the COVID-19 Focused Survey Process.
- Focus Areas:
  - Offsite Survey Activities
  - Onsite Survey Activities
  - Entrance Conference Worksheet
  - Focused Survey Tool
  - Resources & Handouts

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OFFSITE Survey Activities

- If a facility has an **active** COVID-19 case, the survey team will **contact** their State Agency, State Health Department, and CMS Regional Location to coordinate the survey activities.
- Surveyors **must** be **medically** cleared and have **PPE** that could be required onsite.
- Offsite preparation **includes**:
  - The review of **facility reported information**;
  - The review of **CDC**, **State/Local Public Health Reports** (if available);
  - The review of available **hospital** information **regarding** residents **transferred** to the hospital; and
  - **Complaint** allegations.

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OFFSITE Survey Activities-cont'd

- The survey team will **identify** survey activities that can be conducted **offsite**, such as:
  - Medical **record** review;
  - **Interviews** that can be conducted via **telephone**;
  - **Surveillance** policies;
  - **First onset** of symptoms;
  - **How** the facility **communicates** information to staff, visitors, and health officials;
  - **Review** of the facility's Infection Prevention and Control Program Policies and Procedures; and
  - **Review** of the facility's Emergency Preparedness Plan, including emergency staffing.

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ONSITE Survey Activities-cont'd

- **Be prepared to provide the survey team the following data:**
  - Staff **training records** for infection control practices (e.g., hand hygiene, use of PPE, handling laundry, cleaning, etc.) for **current** and **new** staff.
  - **Process** for cleaning, storing/handling soiled linen/laundry.
  - **Process** for cleaning and disinfecting nonporous services (e.g., med carts, counters, etc.).
  - **Cleaning schedule** for common areas, bathrooms, resident rooms, etc.
  - Process for **distributing** water/ice pitchers to residents.
  - **Outbreak** Response Plan.
  - **Protocols** related to **staffing** assignments, screening, etc.
  - **Instructions** related to fit testing of **N95** mask (if in use).
  - **Surveillance** and **monitoring** of COVID-19 **Infection Rates** for **both** staff and residents.

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ONSITE Survey Activities-cont'd

- The onsite will include **Environmental Observations** to determine:
  - If **Signage** is posted at the entrances and resident rooms;
  - How **Screening** is conducted (e.g., staff at shift change, entrances, limiting nonessential staff, etc.); and
  - The **Location** of hand hygiene stations.
- The survey team will **interview** staff for:
  - **Knowledge** of IPCP policies and procedures;
  - **Surveillance** protocols for identifying signs and symptoms; and
  - **Protocols** for notifying local health officials of infections.

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The Entrance Conference Worksheet

- A **brief** entrance conference will be held to **inform** the administrator of the **limited** nature of the COVID-19 focused survey.
- A **modified** Entrance Conference Worksheet will be provided to the Administrator.
- The **following** information is needed **immediately** upon the survey team's entrance:
  - **Census** Number;
  - An alphabetical listing of all **residents** and **room numbers** (including any residents out of the facility);
  - A listing of residents who are **confirmed** or **presumptive** positive for COVID-19.
  - The **name** of the facility staff **responsible** for the Infection Prevention and Control Program.

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The Entrance Conference Worksheet-cont'd

- The **following** information is needed **within one (1)** of the survey team's entrance:
  - The **actual** working schedules for **licensed** and **registered** nursing staff for the survey time period;
  - Listing of **key personnel**, location, and phone numbers. **Contract** staff, such as rehab services are to be included in the listing;
  - How to **access** all resident electronic health records.
  - If the facility's EHR system can be **accessed remotely**, surveyors will request that access information.
  - The **name** and **contact** information for **IT** and **back-up IT questions**.

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The Entrance Conference Worksheet-cont'd

- **Lastly**, the survey team will ask for **specific P & Ps** within one (1) hour of entrance:
  - Your **Infection Prevention and Control Program** policies and procedures, to **include** the **Surveillance Plan**. (**Focus** will be on compliance with survey tag **F880**).
  - Your **Emergency Preparedness Policy and Procedures** to include *Emergency Staffing Strategies*. (**Focus** will be on survey tag **E-0024**: **Policies and Procedures for Volunteers**.)
  - If **OFFSITE** review of EHRs is **not** possible, the surveyors will **request photocopies** of the medical records needed to **determine** compliance or to support identified noncompliance.

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The COVID-19 Focused Survey Tool

- **During** the survey, surveyors will **use** the Survey Tool to **focus** on the **critical elements** associated **with** the transmission of COVID-19. **These critical elements include**:
  - Standard and Transmission Based Precautions;
  - Quality of Resident Care Practices, including COVID-19;
  - IPCP Policies, and Procedures;
  - Infection Surveillance Plan;
  - Visitor Entry and Facility Screening Practices;
  - Education, Monitoring, and Screening Practices of Staff; and
  - Policies and Procedures for Staffing Issues in Emergencies.
- While the **primary focus** is COVID-19, surveyors are instructed to **investigate** any other areas of **potential noncompliance** where there is likelihood of **IJ**.

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Review of the Handouts and Support Resources

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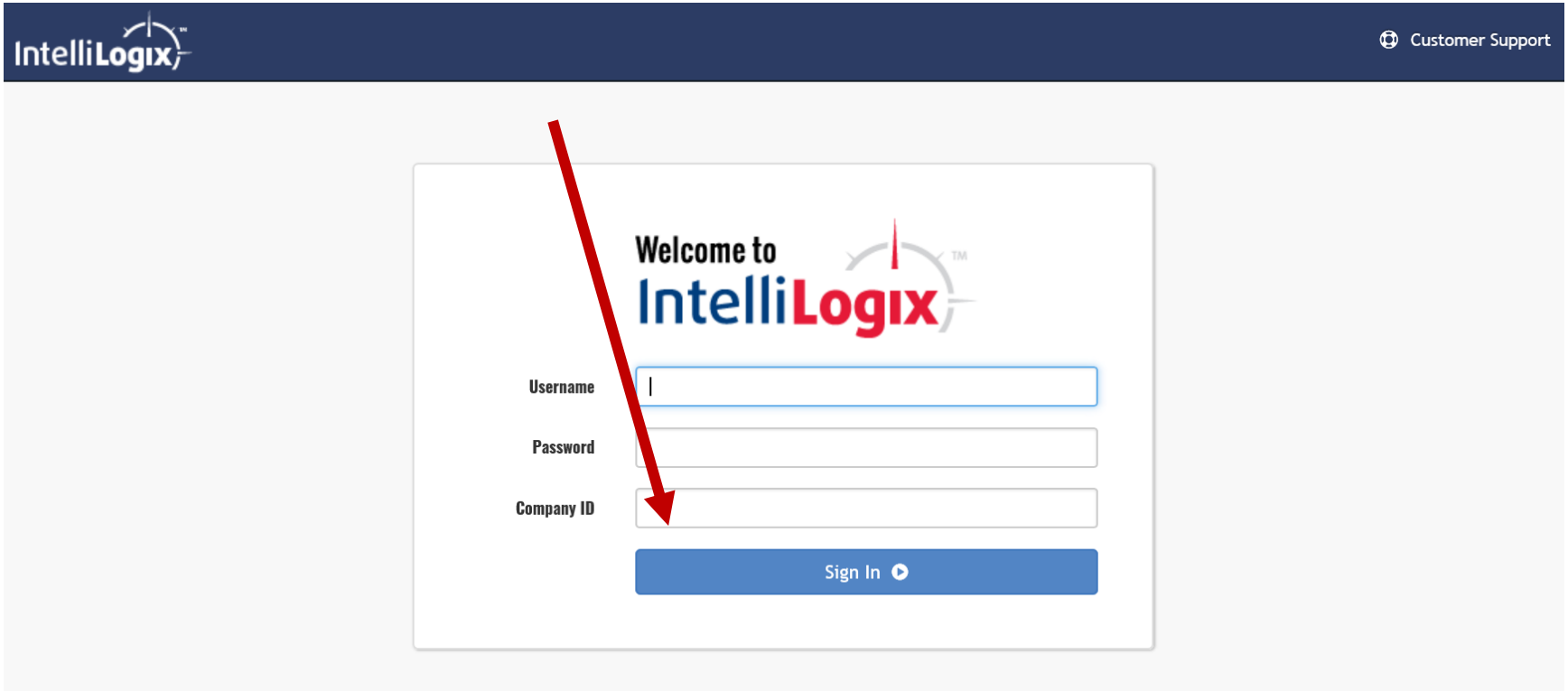
https://www.teamtsi.com/intellilogix



For assistance please contact support@teamtsi.com

We want to hear from you!

- Questions
- Comments
- For Team TSI assistance please contact support@teamtsi.com

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