

Survey process - tracer methodology

2004 marks a change in the JCAHO survey process. This new process changes the format, focus, and flow of the JCAHO survey. We are going to be surveyed using this new process. Have you learned anything about it?

Below is a quiz for you. Take time to research the answers if you don't know them. Over the following weeks, we are going to be learning about the new process and preparing staff. We are going to focus on helping YOU be better able to help your staff. Look for special questions just for leaders.

- 1) There are two types of tracers that the JCAHO will use in the Shared Visions survey process. What are they?
- 2) How will the JCAHO surveyors select clients to trace through their agency experience?
- 3) With whom will the surveyors discuss the client's agency experience?
 - a) staff in the service
 - b) service directors and managers in a special meeting
- 4) What type of tracer is medication management?

Over the last few months, we have been sharing information on Shared Visions with you. Pull that material out of its hiding place and begin your prep work!

ANSWERS

2004 marks a change in the JCAHO survey process. The new survey process is called Shared Visions. It changes the format, focus, and flow of the JCAHO survey. We are going to be surveyed using this new process. I hope you took the time to research the answers to the questions we sent earlier. Below are the answers. Print them out and put them with your JCAHO survey prep information to help you prepare your staff.

- 1) There are two types of tracers that the JCAHO will use in the Shared Visions survey process. What are they?
 - System tracers: medication management, data management, safety, infection control
 - Patient (client) tracers
- 2) How will the JCAHO surveyors select clients to trace through their agency experience?

The surveyors will review client census data on the first morning of the survey. They will select clients based upon our major service areas, critical focus

issues, and high risk or problem prone areas. They could select as many as 11 clients to follow during a typical three-day survey.

3) With whom will the surveyors discuss the client's agency experience?

a) staff in the service. The surveyors want to find out what the staff are really doing, not what the Service Director / Dept. Head has memorized.

4) What type of tracer is medication management?

System tracer

If you didn't have a clue about the answers to these questions, make JCAHO prep a priority on your to-do list!