



**AMBULATORY SITE SURVEY FOR ONE CLINIC**

<b>Contact Information</b>	
<b>Medical Group Name:</b>	<b>Surveyor Name:</b>  <b>Date of Survey:</b>
<b>Clinic Site Name &amp; Address:</b>	<b>Medical Group Representative &amp; Title:</b> <i>(meets with HP surveyor and receives follow-up recommendations. Note if 2 different individuals.)</i>  <b>Phone:</b> <b>Fax:</b> <b>Email Address:</b>
<b>Site Phone:</b>	
<b>Site Fax:</b>	
<b>Medical Records Contact:</b>	<b>Quality Contact:</b>
<b>Phone:</b>	<b>Phone:</b>
<b>Accreditation (circle)</b>	
JCAHO    NCQA    Other (list)	<b>Accreditation Date</b>
<i>If clinic has accreditation, obtain a copy of the survey report that indicates the survey includes the physician's office and meets HealthPartners quality assessment criteria. If these qualifications are met, the rest of this document does not need to be completed.</i>	

<b>Site Survey</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
<b><i>External Access/Appearance</i></b>			
1. Building is easily identified and accessible (includes: handicap accessibility)			
2. Practitioner's names are listed near entrance/reception area or printed information is available to patients (i.e.: brochure, business cards)			
3. Hours of operation and after hours care are posted near entrance/reception area or printed information available to patients (i.e.: brochure with hours)			
4. Adequate patient and handicap parking is available			
5. Parking areas and clinic entrance are well lit and well maintained			
<b><i>Internal Access/Appearance</i></b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
6. Adequate signs/directions to patient care, business office and administrative areas			
7. Reception/waiting areas are adequate to accommodate patient flow and volume			
8. Exam/treatment rooms are adequate to accommodate appointment scheduling, patient privacy, etc.			
9. Patient care areas are handicap accessible			
10. Reception/waiting areas and exam/treatment rooms are clean and well maintained			
<b><i>General Safety Management</i></b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
11. Fire safety procedures and systems are in place (i.e.: unobstructed fire exits/doors, alarms, sprinkler systems)			
12. Abusable supplies are appropriately secured (i.e. are not in exam rooms - drugs, syringes, prescription pads)			
13. Hazardous waste containers <b>and</b> Sharps containers are present			
14. Sample medications are kept in a <u>locked area</u> and <u>logged out</u> when provided to patients and routinely <u>checked for expiration date</u> (circle if yes)			



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<b>Site Survey, continued</b>			
<b>Access</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
15. Medical Coverage is available 24-hours/day			
16. Written policy exists for appointment availability			
17. Preventive Care appointments can be obtained within four weeks			
18. Non-Urgent, symptomatic appointments can be obtained within 48-72 hours			
19. Urgent Care appointments can be obtained within 24-36 hours			
20. Policy exists for answering and returning phone calls			
21. Compliance with answering and returning phone calls is monitored			
<b>Medical Record-Keeping</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
22. Medical records are stored in a secure area that is inaccessible to unauthorized individuals. Area is locked or someone present at all times during open hours.			
23. Written policies exist for confidentiality, release of information, and advanced directives			
24. Written policy for medical records standards. Compliance with medical record organization and documentation requirements is monitored			
25. Written policy exists for chart availability between practice sites			
26. Written policy exists for continuity & coordination of care with other practitioners & providers (i.e.: hospitals, home cares, nursing homes, specialists)			
27. Review paper medical record or obtain a copy of a list (chart order) showing what's included in the medical record (i.e.: problem list, immunizations, medication flow sheet).			
28. An electronic medical record (EMR) system has been implemented? If yes, obtain either a copy of the policy and procedure manual's Table of Contents or a list of what is included (i.e.: problem list, immunizations, medication flow sheet).			
29. Clinic physicians participate in one or more of the NCQA Physician Recognition Programs (circle all that apply): 1) Back Pain 2) Diabetes 3) Heart/Stroke 4)Physician Practice Connections			

***If you answered No to any of the above questions please explain/comment:***

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