



**COMMUNITY HEALTH PLAN**  
of Washington

*Committed to your health.*

**SITE REVIEW DOCUMENT**

<b>Date:</b>		<b>Time:</b>	<b>Reviewer:</b>	
<b>Site Name and Address</b>			<b>Initial</b> <input type="checkbox"/>	<b>Complaint</b> <input type="checkbox"/>
<b>Contact</b>			PCP <input type="checkbox"/>	OB/GYN <input type="checkbox"/>
<b>Phone #</b>			Other <input type="checkbox"/>	

<b>Pass/Corrective Actions/Fail for Criteria I, II, III, IV &amp; V – Site Review &amp; Protocols</b>	<b>Pass 90-100%</b>	<b>Corrective Actions 70-89%</b>	<b>Fail Under 70%</b>	

<b>Criteria I: Written Protocols</b>				
Written emergency protocol showing how facility is evacuated during fire, earthquake, etc. Protocol should show responsibility of staff and where everyone meets	2	1	0	N/A
Written protocol addressing failed appointments.	2	1	0	N/A
Written protocol for reviewing diagnostic results and patient notification	2	1	0	N/A
Written protocol for confidentiality of patient records – when/why medical records are copied or removed from the office.	2	1	0	N/A
Written OSHA protocols. Protocols should be office specific which should include sharps handling, laundry of linens if used, sterilization of equipment, etc.	2	1	0	N/A
Written protocol or evidence of annual employee training for evacuation, blood borne pathogens, safety, HIPAA, etc.	2	1	0	N/A
Written protocol or evidence of new employee orientation/training. Confidentiality statements signed by all employees	2	1	0	N/A
Protocols for Urgent, symptomatic office visits, (within 48 hrs) Non-Urgent, symptomatic, (within 10 calendar days) Non-symptomatic preventive/routine health (within 30 calendar days) and Referrals (within 2 weeks)	2	1	0	N/A
<b>Criteria II: Clinic accessibility and appearance</b>				
Adequate Parking	2	1	0	N/A
Handicapped parking with spaces clearly marked	2	1	0	N/A
Address visible and building identified	2	1	0	N/A
Hours of operation and after hours are clearly posted	2	1	0	N/A
Waiting area is clean and orderly	2	1	0	N/A
Waiting area has adequate seating	2	1	0	N/A
Adequate privacy at registration, meeting HIPAA guidelines	2	1	0	N/A
Toys are cleaned and inspected on a regular schedule at least weekly	2	1	0	N/A
There is evidence of patient education material and/or programs available to patients.	2	1	0	N/A
Wheelchairs have access to office, exam rooms and restrooms: Building is accessible to the disabled; i.e., ramps, handrails, elevators, etc.	2	1	0	N/A
Exam rooms are private and have a neat and orderly appearance	2	1	0	N/A

<b>Criteria III: Office is environmentally safe</b>				
Presence of fire extinguisher and service schedule	2	1	0	N/A
Knowledge by selected staff members of evacuation plans	2	1	0	N/A
Evacuation plans are posted, exit signs are clearly visible and emergency exits are unlocked during business hours.	2	1	0	N/A
Minimum of one current CPR-trained staff member.	2	1	0	N/A
Prescription pads are kept in area away from patients.	2	1	0	N/A
Refrigerators are separate for medical supplies.	2	1	0	N/A
Consent forms for immunizations and invasive procedures are used	2	1	0	N/A
If PCP, Advanced directive information is offered/available	2	1	0	N/A
Autoclave maintenance is documented or logged	2	1	0	N/A
Crash Carts/Kits checked monthly	2	1	0	N/A
Sharps containers (rigid unpierceable) present in patient areas and are placed out of reach of children.	2	1	0	N/A
Pharmaceuticals/Sample drugs are inaccessible to patients	2	1	0	N/A
System in place for dispensing sample pharmaceuticals or controlled drugs.	2	1	0	N/A
Controlled drugs and substances are <u>logged</u> and stored in a locked area. Check log book and locked area.	2	1	0	N/A
Expired medications are returned to the manufacturer or witnessed destruction	2	1	0	N/A
On-site x-ray equipment is currently licensed by WA state	2	1	0	N/A
Signs alerting pregnant patients of radiological equipment are clear and visible	2	1	0	N/A
Current CLIA license or waiver, or WA state lab license. Displayed or available to reviewer.	2	1	0	N/A
<b>Comments:</b>				

<b>Criteria IV: Appointment and Accessibility to patients</b>				
Monitoring of phone wait times (speed of answer and abandonment rate) (How is this captured? Stats, Reports? – see example of telephone system records)	2	1	0	N/A
Adequate phone systems and receptionists for phone volumes (How many lines – how many receptionists. Are there enough...(see stats from above)	2	1	0	N/A
System for after hour's coverage exists (on-call provider, etc) (Ask to see on-call arrangement. How long does it take on-call practitioner to respond?)	2	1	0	N/A
Licensed staff available to triage urgent calls as indicated. (RN's, LPN's or? Is this done at clinic or call center?)	2	1	0	N/A
Provisions for patients with special needs – Non-English speaking, Hearing impaired (Office staff? Protocol?)	2	1	0	N/A
Staff assigned to deal with patient complaints	2	1	0	N/A
System exists for soliciting patient feedback	2	1	0	N/A
<b>The following must be shown :</b>				
Wait time for non-life threatening emergency office visits. (ability to be seen at clinic within 6 hours) <b><i>Behavioral Health only</i></b>	2	1	0	N/A
Wait times for urgent, symptomatic office visits. (ability to schedule appointments within 48 hours)	2	1	0	N/A
Wait times for non-urgent, symptomatic. (ability to schedule appointments w/in ten calendar days)	2	1	0	N/A
Wait times for non-symptomatic preventive/routine health. (ability to schedule appointments w/in 30 calendar days)	2	1	0	N/A
Wait times for referrals. (ability to schedule appointment within 2 weeks)	2	1	0	N/A
<b><u>Comments</u></b>				

<b>Criteria V: Medical Records</b>				
<b>Paper Files</b>				
Medical Records are kept in a confidential manner	2	1	0	N/A
Only authorized personnel have access to records	2	1	0	N/A
Staff receive periodic training in member information confidentiality	2	1	0	N/A
All pages securely attached in the medical record: No loose notes	2	1	0	N/A
Patient name on all pages in record	2	1	0	N/A
Missed appointments are documented	2	1	0	N/A
Medical records are organized and include the following: History and physicals, Allergies and adverse reactions, Immunization records, Medications, Problem list, Past medical history, Lab notes, Hospital admissions, Documentation of clinical findings and evaluation for each visit, Preventive services/risk screening.	2	1	0	N/A
Tracking system to facilitate medical record location at all times.	2	1	0	N/A
Off-site storage, purging criteria, where stored, security measures, who has access.	2	1	0	N/A
<b>Electronic Files</b>				
Secure confidential filing system	2	1	0	N/A
Password protected	2	1	0	N/A
User has appropriate authorization and user levels. Access to confidential information is restricted.	2	1	0	N/A
Tracking system for who accesses records	2	1	0	N/A
Tracking system for all missed appointments, changes/updates to the records	2	1	0	N/A
Records include: History and physicals, Allergies and adverse reactions, Immunization records, Medications, Problem list, Past medical history, Lab notes, Hospital admissions, Documentation of clinical findings and evaluation for each visit, Preventive services/risk screening	2	1	0	N/A
Back up server/plan in the event of an emergency to ensure that electronic records are preserved and secure	2	1	0	N/A
Plan for handling old paper files	2	1	0	N/A