



## Level IV (Basic) Trauma Facility Survey Agenda

**Hospital:** hospital, address

**TETAF-credentialed surveyors:** xxx, RN, Trauma Nurse

**Observers:**

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### Two-Day Survey Schedule

#### Day 1—Pre-Survey Medical Record Review Date and Start Time: date, 12:00 pm\* to finish

*Please note:* This is a closed, working session and requires the trauma program manager, trauma registrar, trauma medical director and the surveyors only.

- I. Medical Records and Documents Review (*approximately 6 to 8 hours*)
  - A. The survey team works in collaboration, space should allow for reviewers, navigators and conversation in a private conference room meeting area.
  - B. Available documents during record reviews includes quality assurance documents, peer review, meeting minutes and all policies.
  - C. Provide a computer terminal with a navigator for each surveyor.
  - D. The navigator is key to a successful review. Ensure accessibility to all medical records as needed.
  - E. Medical Records Requested for Review  
Your date range for record reviews is the last 12 months; special or additional record requests may be made by the surveyors for the entire three-year cycle.  
  
Provide a trauma log of records by the categories defined below. Please ***highlight*** all cases that have been quality reviewed.
    - i. All trauma deaths treated at your facility
    - ii. Patients transferred out of your facility
    - iii. Admissions to your facility
    - iv. All ED-to-OR trauma cases
    - v. All trauma admissions to ICU
    - vi. Pediatric (less than or equal to 17 yrs) admits or transfers
    - vii. Burns and spinal cord injuries admitted or transferred from your facility
    - viii. Special or additional record requests may be made at surveyor discretion and shall be accommodated.
- II. Credentialing, certifications and continuing education will be reviewed for all providers.
- III. Day 1 wrap-up with trauma medical director and trauma program manager.

**Day 2—date, 8:00 am to finish**

- I. Site Survey Opening Conference—surveyors to lead (*approximately 90 minutes*)
  - A. Expected participation:
    - i. Hospital and trauma program leadership personnel
    - ii. Physician and/or surgeon representatives
    - iii. Departmental directors for all departments managing trauma patients
    - iv. EMS and RAC representation
- II. Hospital Tour—limit the hospital tour escorts to avoid patient care disruption (*approximately 45 to 90 minutes*)
  - A. Staff will be interviewed in individual departments.
  - B. Surveyors will tour units listed below; however, at surveyor discretion, additional units may be added.(\*)
    - i. Emergency Department
    - ii. Medical Imaging
    - iii. Laboratory / Blood Bank
    - iv. Critical Care Unit (ICU, SICU, TICU)
    - v. Operating Room
    - vi. Post-Anesthesia Care Unit (PACU)
    - vii. Surgical Nursing Units\*
- III. Surveyor closed session—survey team to prepare exit summary (*approximately 45 to 60 minutes*)
- IV. Closed session—trauma medical director, trauma program manager and surveyor team
- V. Exit Conference (*approximately 45 minutes*)
  - A. Expected participation: hospital executive leadership and trauma program leadership.
  - B. Review of potential criteria deficiencies
- VI. Consultation Conference (if requested, *approximately 45 minutes*)
- VII. Survey Team Exit

\* Opening and Exit Conference times may be altered due to travel.