

➡ **Presurvey Preparation:** ▲

Purpose - To determine the preliminary data-driven focus area(s) for the survey

Review the most current Dialysis Facility Report (DFR): *Note how the facility is ranked on the State Profile/Outcomes List. Refer to the guidance in the Presurvey Preparation section of the current fiscal year “ESRD Core Survey Data Tools” worksheet for review of the DFR, and comparison of the facility outcomes and trends with national averages. If the facility outcomes are worse than the national average, plan to include that area as a **preliminary data-driven focus area**.*

Contact the ESRD Network: *Ask about any quality concerns at the facility, information regarding involuntary discharges and transfers, and patient complaints.*

Review the facility complaint and survey history for the current 12-18 months. *Look for trends in patient and/or staff complaint allegations, and survey citations*

Copy the Entrance Conference Materials List section of the “ESRD Core Survey Data Tools” for the current fiscal year to present to the facility person in charge during “Introductions.” *Gather other documents needed to conduct the survey (e.g., 3427, survey worksheets, etc.).*

➡ **Introductions:**

Purpose - To introduce the survey team, announce the survey, and to give the person in charge notification of the materials needed from the facility to conduct the Entrance Conference.

Contact the person in charge: *Introduce the survey team; give that person the copy of the Entrance Conference Materials List from the “ESRD Core Survey Data Tools” for the current fiscal year. Explain that these are the items the survey team will need to conduct the survey and that the facility should provide the materials on the first 3 pages, i.e., patient-specific and facility current clinical outcomes information, within 3 hours for discussion during the Entrance Conference.*

