



How to Use Your Accreditation DIY Kit

Thank you for purchasing the Accreditation DIY Kit from Domos HME Consulting Group. We appreciate your business, and greatly value your satisfaction with our products and consulting assistance. Our products are continuously updated and have been used for over a decade to assist clients in preparing for a successful accreditation survey with a wide range of accrediting bodies. Reading this document before you begin the preparation process will help you get the most from the comprehensive kit you have just received, and help you successfully complete the accreditation process.

Before we get into the specifics of using this kit, let's review our top ten accreditation preparation tips:

- 1. Choose the right accrediting body for your business.** While you may be tempted by the cost of one accrediting body versus another or enticed by how “easy” an accrediting body is rumored to be compared to their competitors, there are several other factors to consider. Not all CMS approved accrediting bodies offer accreditation for all products; some dovetail better with mail order companies, others with providers that also operate hospitals, home health or hospice organizations. Most importantly, more and more commercial insurance payers are beginning to mandate accreditation as a condition of allowing DME providers into their preferred networks. Make sure insurance providers in your area that require accreditation recognize the accrediting body that you plan to use, if you want your accreditation to do more for you than allow you to continue to be reimbursed by Medicare.
- 2. Get into it!** I know this falls into the category of “I’ll believe it when I see it” for most providers, but the truth is accreditation can work like miracle grow for your business. Not only will it help you contract with more insurance payers, but if you take it seriously, the accreditation preparation process can improve nearly every aspect of your business. Staff members are better trained, they begin to get used to the idea of following specific processes, quality of care improves, business processes improve, referrals increase, and growth happens. Providers that determine to make the most of the process will reap the benefits for the lifetime of their company.

- 3. Don't hesitate to get help.** The accreditation standards are not difficult to implement, but they are detailed, and the learning curve can be rather steep. Unless your company is large (and with the financial resources that go along with being a large company) it's probably neither realistic nor cost effective to assign a full-time employee to do nothing but research and memorize the accreditation standards and then implement them. You made a big step in the right direction by buying this kit. Use your phone time (included with the kit or subscription) to your best advantage – make note of your questions and, when they have accumulated, call or email to schedule some time to speak with one of our consultants.

Domos HME Consulting is unique in that it provides both phone and on-site consulting, and you are always welcome to credit half the cost of the kit / yearly subscription to the cost of an on-site consulting engagement. So if you find that Do-It-Yourself is not for you please give us a call.

- 4. It's not about "got'cha."** Contrary to some rumors you may have heard, the accrediting bodies and their surveyors are not invested in catching you doing something wrong. The job of the accrediting bodies is to develop quality standards that meet with Medicare regulations, and to improve the consistency and quality of care provided to patients that need durable medical equipment and supplies. The job of surveyors is to ensure that your company is meeting those standards, and to offer recommendations to improve your organization's compliance with the standards. The vast majority of accreditation surveyors are just as dedicated to the health of the overall DME industry as you are. However, also see tip number five.
- 5. It's not about an "A for effort" either.** You can have the patient's best interest at heart and think you are doing all the right things, and still fail to pass an accreditation survey. The standards are very specific and you must follow them as required. While some may not make immediate sense to you, most of them have an intent behind them that exists for a good reason, and many ensure compliance with a myriad of state and federal laws as well. Surveyors do have some leeway in the way they score a company's compliance with the standards, but it is unlikely the surveyor will give you credit for simply being well-meaning in your intentions. And keep in mind that failing a survey means starting the process again, in which case you have immediately doubled your cost of accreditation.
- 6. Show your work.** In many cases providers are already doing what many accrediting body standards require, but they fail to document their activities. You've put a lot of time and effort into training competent employees – document those efforts on an employee training checklist or orientation outline. If you're like most business owners or managers

you strive to improve the company's performance in large and small ways every day. Formalize and document larger performance improvement activities according to the instructions we have provided. You spend a great deal of time training patients how to use the products you provide safely and effectively. Again, document it with the forms and templates we have provided. You have great processes in place to help patients get the quality care they deserve, and to help the business run profitably. Implement the policies and procedures in the manual that came with your kit.

- 7. Let your HME software help.** Your HME software system very likely contains many features that can assist you in more productively complying with accreditation standards. Tracking equipment serial and product lot numbers; documenting cleaning, function checking, and preventative maintenance of rental equipment in between patients; logging customer complaints and complaint resolution; and compiling aggregate data on Medicare billing and coding errors can all be accomplished more efficiently by using your HME software system to track and report the data. Almost every HME software system includes these types of features, so use them to help you meet the standards.
- 8. Do a mock survey.** It's always good to do a dry run and survey your company before the accrediting body surveyor arrives to perform the real thing. Most accrediting bodies will provide you with an interpretation of their standards, and a description of what exactly takes place during the actual survey. You can use this type of information as a guide to conducting your own mock survey.

The action plan template and the other audit forms included in this kit walk you through the process of making sure you are in compliance with all accrediting body standards. Complete a mock survey with these tools prior to survey, and correct any deficiencies before the actual accreditation survey takes place.

- 9. Stay in compliance.** An accreditation survey is not a one-time thing. Although the re-survey period varies depending on the accrediting organization, most are in the range of every 2 to 3 years. However, all surveys, by CMS mandate, are unannounced, so staying in compliance is necessary in order to retain your Medicare number. And besides, it's no fun to revamp your business processes every time you are expecting to be re-surveyed by your accrediting organization. Staying in compliance is much less stressful for everyone involved with your business, and it will reduce the need for the additional outside assistance you may have needed when you got the business accredited the first time. And realistically, the potential benefits to your business that come from doing things the "accreditation way" won't be realized unless you follow the standards consistently.

Beginning Nov 1st 2008 Domos HME Consulting Group will offer a computerized Continuous Accreditation Compliance Program™. The program uses a collaborative software tool by Microsoft (Microsoft Office Groove™) that allows you to maintain a continuously updated electronic policy and procedure manual; keeps you up-to-date on HME accrediting body requirements as they change; and offers a task management system, with tasks hyperlinked to relevant policies, forms, templates and tools contained in your kit. In addition, you can assign tasks to various individuals, monitor their progress, and track issues that may be problem areas for your company.

Best of all, you need not be online to use the tool as with some programs – you only need to be online long enough for the program to update itself when new policies, tools, forms, and templates are added by us. And it all happens automatically after you log in. When you log off the updates are available on your computer for review and / or editing and customizing.

This product will be available as an addition to our DIY kit – see the web site or call our office at 425-882-2035 for details on subscription fees.

10. Use your success to your best advantage. Let's face it; getting your organization accredited is quite an accomplishment. There are some providers that won't make it – others that won't even try. That should give your successfully accredited company a chance to stand out among both potential patients and referral sources. Advertise your accreditation proudly. If you've been closed out of commercial insurance networks try again to become a preferred provider, this time with your accreditation certificate as evidence that they should welcome you into their network.

What's in the kit:

- HME policy and procedure manual – includes competency training and evaluation material and forms section
- Accreditation DIY Manual – includes training slides, templates, employee training material, and audit tools for mock survey
- HIPAA for HME Providers
- Patient Equipment Education Guide set – also useful for training employees on what they should review with patients at equipment set-up / delivery

Step by Step – Using Your Kit

1. **Review the training slides** found at Accreditation DIY | Training slides folder on your disk, and in the corresponding chapters in your DIY manual. There is a training slide set for each major area associated with accreditation preparation. For instance, there are training slides that cover personnel files / employee competency; patient documentation; warehouse / facility; vehicles; performance improvement, etc.
 - You may wish to review all training slides for an overview of the requirements, then return to slide set number 1 on your disk and complete the tasks in that slide set. Another method would be for the main project manager of the accreditation preparation process to review all slide sets and then delegate tasks from each slide set to various individuals within the organization.
 - Note that the each training slide set has an accompanying folder on the disk which contains the relevant forms, templates or other documents that were referenced in that training slide set. For instance, once you complete the “Performance Improvement” training slides you will reference the “performance improvement” folder (Accreditation DIY | Performance Improvement) in the DIY kit to find templates for completing mandatory performance improvement reports.
 - For items that are unclear, make notes on the printed slides in your DIY manual so that you can remember to ask our consultants about these topics when you schedule your phone time.
2. **Customize your policy and procedure manual.** You don’t need to make many changes to the manual, but someone in your organization should review it.

You will need to change:

- References to medical record retention laws (see action plan for specific policy, and the reference document in the Patient Documentation DIY folder for a list of state laws). In no instance may your record retention policy be less than 7 years since this is the Medicare requirement.
- Information about governing body ownership of the company in the Leadership chapter.

- Information about who has access to medical records in the Information Management chapter. Describe the roles or job titles that have full and / or limited access to medical records or other protected healthcare information.
- Some accrediting bodies have specific policy requirements – those policies are not in the printed version of the manual. Look in the subfolders of your HME Policy and Procedure manual folder for accrediting body specific folder and incorporate those policies into your own manual.

In these same folders you will find crosswalks from our policy manual to accrediting body standards for both ACHC and CHAP, which both require you to send in a significant number of policies and other documents for review by them prior to completing your on-site survey. These cross walks will provide significant assistance in preparing the required documentation during the survey application process.

- Reference to the particular products your company provides in the “Scope of Services” policy.

You will NOT need to change:

- References to the phrase “The company” in the manual. The accrediting body does not require that you insert the company name into each policy.
- The “effective” “review” or “revision” dates on each policy. Instead you can place a single piece of paper at the front of the manual stating that all policies are “effective” as of a certain date unless otherwise noted on the policy itself. Do this prior to survey and have this statement signed by leadership / ownership of the company.
- Review and revision date fields should be completed only as policies are reviewed and revised. This is an important task because the accrediting body will hold your organization responsible for following its own policies. Proper review and revision dates let them know when a policy was implemented as currently written, so that you are not held responsible for implementation prior to the revision date during accreditation re-surveys in subsequent years.

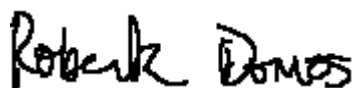
3. Begin accreditation preparation tasks.

- After completing a review of training slide sets, start to tackle the tasks in each section using the tools provided.

- The action plan template, located at [Accreditation DIY | Audit Forms | Action plan](#) is an excellent task checklist type tool, which also references the exact location, on the disk, of tools relevant to that particular task. Essentially this document compiles the tasks noted in the training slides in one easy-to-use document. Use it as you complete the tasks to keep track of your progress.
 - Go back to the training slides when you have questions. If you are still unclear how to proceed, write your questions down so that we may review them with you during your scheduled phone time with one of our consultants.
4. **Conduct a mock survey.** Use the tools and a fresh copy of the action plan found in [Accreditation DIY | Audit forms](#) to assess whether you are ready for an actual survey. Note discrepancies and correct them prior to applying for survey.
- Keep in mind that it is likely that your organization will NOT receive accreditation until you have completed ALL the applicable tasks listed in the action plan, to a 95% degree of compliance. If you are surveyed and have not corrected the deficiencies you will need to show the accrediting body that they have been corrected before they issue you your certificate, and in some cases they will require you to go through an additional survey at an additional cost.
5. **Apply to your preferred accrediting body for survey.** Keep in mind that your organization is subject to survey within only a month or so of applying for survey (timeframes vary by accrediting body) and that all surveys are unannounced, by Medicare mandate. So, it is wise not to apply for survey until all preparation tasks are complete.
6. **Sign up with our subscription Continuous Accreditation Compliance Program** in order to maintain compliance and be ready for re-survey every 2 to 3 years. Call our office at 425-882-2035 for details.

Thank you again for purchasing our kit and putting your faith in our expertise. Your satisfaction is extremely important to us and we welcome your feedback. Please don't hesitate to contact us with additional questions or suggestions.

Regards,

Robert Domes