The following sample agenda is designed as a framework for areas that will be reviewed and discussed the day of the survey.  Other areas may be reviewed at the discretion of the Licensing Team. Please ensure that a workspace is available for breakout groups and record review after the Overview.   *In the event that items requested are not prepared and available at the time of the survey may result in a return visit of the survey and delay in relicensure.*

**Overview**

Please present general information about the current state of the service.

* Take this opportunity to address strengths, weakness, opportunities, and challenges for the program
* Restraint/ Seclusion Prevention Activities discussion (Please invite those integral to the discussion.) The topics will include, but are not limited to:
  + Current Strategic Plan that includes the Six Core Strategies
  + Use of Safety Tool and Treatment Planning
  + Trauma Informed Care and Patient Centered Treatment
  + Staff and Patient Debriefing practices
  + Senior Administrative Debriefing

**Physical Plant/Environment of Care:**

A designee should be available to accompany Licensing Staff onto the unit(s).  Please allow a confidential space for Licensing Staff to speak to unit staff and patients.  The walk through will include, but is not limited to:

* All areas that are designated as patient or visitor spaces
* The Nursing Station
* Common Areas

**Clinical Program Review:  (breakout meeting)**

The person(s) responsible for coordinating the Clinical Group Program should be available for discussion.  The topics will include, but are not limited to:

* The philosophy and schedule for the service
* Training/supervision of staff assigned to run groups
* Strengths and challenges of the Clinical Programming

**Patient Rights: (breakout meeting)**

The Human Rights Officer should be available to discussion.  The topics will include, but are not limited to:

* Policies and practices related to the DMH complaint process (Complaint Log)
* Training for staff and patients
* Patient handbook
* Strengths and challenges of the Human Rights program
* Additional Human Rights Representatives

**Electroconvulsive Therapy (if applicable): (breakout meeting)**

The Medical Director or attending should be available to discussion.  The topics will include, but are not limited to:

* The numbers of both inpatient and outpatient ECT treatments performed for the past 2 years per credentialed physician
* Provide a copy of the current hospital credentialing files for each physician performing ECT
* Strengths and challenges of the ECT program

**Review of Patient Records**: Open records will be selected and reviewed during environment of care tour. Closed records will be reviewed throughout the course of the day.  If the medical records are electronic, *please have a minimum of XX (per number of surveyors) computers and staff available and familiar with the navigation*, to assist with reviewing the records.

Please have available the following specific recently within 1 year, closed records *(as applicable)*:

* 2 records of individuals restrained or secluded (please provide staff debriefing forms)
* 2 records of patients who received ECT treatments
* 1 record of a patient with co-occurring medical issues
* 1 record of a patient who sustained an injury post fall

If there are multiple units, please provide one (1) record per unit as applicable.

**Policies and Procedures**:

Please have all policies and procedures relevant to the Behavioral Health Unit available to review.  If this is information is stored electronically, please print out a Table of Contents.

**Staffing:**

Staffing details with census for unit will be requested (The Licensing Team will select two weeks of staffing with census to be provided/ reviewed at the time of the survey.)

**If you have questions regarding this process or have specific questions related to the application form, please contact Carey Lambert, RN, at 617-626-8110.**