

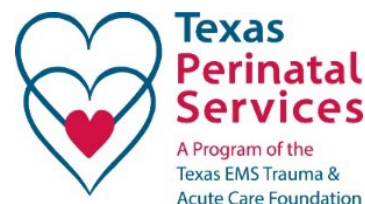
# Texas Perinatal Services Survey Timeline & Checklist

**Purpose:** Provide a roadmap for perinatal programs to navigate the designation survey process

EXAMPLE SCHEDULE	SUGGESTED CHECKLIST
<p><b>18 months PRIOR to designation expiration</b></p>	<p><b>Texas Perinatal Services Consultation (recommended)</b></p> <ul style="list-style-type: none"> <li>○ Identify strengths, areas of improvement, and potential deficiencies in advance of designation survey.</li> <li>○ Create action plan to reduce need for mid-cycle/contingency survey.</li> </ul>
<p>Dates based on September 1, 2023 expiration date</p> <p><b>September 2022</b></p>	<p><b>Request Designation Survey through Texas Perinatal Services</b></p> <ul style="list-style-type: none"> <li>○ Complete and submit Texas Perinatal Services' online Request for Survey form               <ul style="list-style-type: none"> <li>● Include 4-week preferred date range for survey</li> <li>● Clear date range with Medical Director and Hospital Leadership. Their participation is expected.</li> </ul> </li> <li>○ Receive confirmation from survey scheduling team</li> <li>○ Receive, complete, and return business agreements</li> <li>○ Receive and begin work on Pre-Survey Questionnaire (PSQ)</li> </ul>
<p><b>October 2022</b></p>	<p><b>Confirm Survey Date with Texas Perinatal Services</b></p> <ul style="list-style-type: none"> <li>○ Receive survey date confirmation and calendar items from scheduling team</li> <li>○ Receive preliminary survey agenda</li> <li>○ Receive invoice and arrange for payment</li> </ul>
<p><b>October 2022 – January 2023</b></p>	<p><b>Prepare Hospital Documentation</b></p> <ul style="list-style-type: none"> <li>○ Complete PSQ</li> <li>○ Electronically submit PSQ to scheduling team by secure email or file sharing site (Ex: Dropbox)</li> <li>○ Organize program documentation – including program policies, QAPI plan and processes, educational materials</li> <li>○ Ensure payment has been processed and delivered</li> </ul>
<p><b>February 2023</b></p>	<p><b>Prepare for Survey</b></p> <ul style="list-style-type: none"> <li>○ Agenda review discussion with scheduling team               <ul style="list-style-type: none"> <li>● Conference call or virtual meeting 2-4 weeks prior to survey</li> </ul> </li> <li>○ Provide arrival instructions for survey team</li> <li>○ Create admission records log – Do not pre-select records</li> </ul>

## Texas Perinatal Services Survey Timeline & Checklist

EXAMPLE SCHEDULE	SUGGESTED CHECKLIST (CONTINUED)
<p><b>March 1-2 2023</b></p> <p>5-6 months PRIOR to expiration date</p>	<p><b>Pre-Survey Record Review and Survey</b></p> <ul style="list-style-type: none"> <li>○ Pre-Survey Medical Record &amp; Documentation Review</li> <li>○ Survey (including opening conference, department walk-through, and exit conferences)</li> </ul>
<p><b>Late March 2023</b></p>	<p><b>Receive Survey Documentation</b></p> <ul style="list-style-type: none"> <li>○ Receive digital copies of the survey report, record review packet, and Texas Perinatal Services exclusive consultation supplement including program strengths and recommendations for improvement</li> <li>○ Complete online evaluation</li> </ul>
<p><b>April - May 2023</b></p> <p><b>Submission Deadline: June 1, 2023</b></p>	<p><b>Review Survey Report and Create Action Plan</b></p> <ul style="list-style-type: none"> <li>○ Review received documents from Texas Perinatal Services</li> <li>○ Prepare plan of correction (if potential deficiencies are identified)</li> </ul> <p><b>Submit Application to DSHS**</b></p> <ul style="list-style-type: none"> <li>○ Submit accurate and complete application form, survey report, record review packet, evidence of participation in Perinatal Care Region, and plan of correction (if needed) to DSHS for final designation approval                             <ul style="list-style-type: none"> <li>● Per state rule, materials must be submitted to DSHS at least 90 days prior to designation expiration date and no more than 90 days after the survey date.</li> <li>● Do not hold survey report/documents. The report should be submitted as soon as possible after receipt from Texas Perinatal Services. The results of plan of correction will be in progress - not necessarily completed.</li> </ul> </li> </ul>
<p><b>Sept. 1, 2023</b></p>	<p><b>Designation Expiration Date</b></p>



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