

Office Site Visit Tool

Reviewed: ___ / ___ / ___ By: _____ Review Type: Initial ___ Re-Audit ___
 New Office ___ Other ___
Street Address: _____ City: _____ Zip: _____ Phone Number: _____
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<u>Practitioner Name(s)</u>	<u>Specialty</u>	<u>Practitioner Name(s)</u>	<u>Specialty</u>
1. _____	_____	5. _____	_____
2. _____	_____	6. _____	_____
3. _____	_____	7. _____	_____
4. _____	_____	8. _____	_____

GENERAL SITE CRITERIA	Point Value	Score	Comments
1. Adequate access to building and office, including handicap accessibility.	4		
2. Comfortable/adequate seating space for the volume of patients being seen. At least 5 chairs per physician (10 for pediatrics). Reasonable limit: 25 chairs.	2		
3. Adequate, well-lit, private exam rooms per physician.	3		
4. The following examination equipment is readily accessible: slit lamp, phoropter tonometer, and ophthalmoscope.	2		
5. Bathroom(s) are clean, properly supplied and handicapped equipped.	2		
6. Office is clean, professional looking and well maintained.	2		
7. Controlled substances/sample/OTC medications, if dispensed, are monitored, secured and verified.	2		
8. Prescription pads and syringes/needles are contained in a secure area.	2		
9. Each exam room has sharp containers, (if appropriate) which are mounted properly, not overfull, and there is a procedure that ensures proper disposal.	5		
10. The office has a written Infection Control Policy	5		
11. The office has a process in place for the identification and disposal of expired medications.	3		
12. Gloves are readily available in each exam room.	5		
13. Scheduled office hours are a minimum of 24-hours per week.	2		
14. Appropriate arrangements are in place for 24-hour on-call coverage.	3		
15. At least 1 person in addition to physician is trained in basic CPR.	5		
16. Process exists for informing patients of their rights and responsibilities.	3		
17. Process to check current licensure of office clinical staff, e.g. Nurse Practitioners, Physician Assistants	5		

MEDICAL RECORD KEEPING PRACTICES CRITERIA (Review 5 Medical Records or a Medical Record Model)		Point Value	Score	Comments
1.	The office has a process for maintaining confidentiality for medical records, release of patient's medical information and for patient confidentiality in general.	5		
2.	The office has a written Notice of Privacy Practices.	5		
3.	Medical records are protected from public access.	3		
4.	The gender is indicated.	2		
5.	The date of birth is included.	2		
6.	The home address is included.	2		
7.	The home <u>or</u> work telephone number is included (Adult) or home/work telephone number of parent (Pediatrics).	2		
8.	The occupation is included (Adult).	2		
9.	The employer is included (Adult) or employer of parent (Pediatrics).	2		
10.	The marital status is included (Adult).	2		
11.	<u>All</u> pages in the record contain patient identification.	3		
12.	There are individual medical records for each individual receiving care.	3		
13.	The medical record is organized.	3		
14.	Each entry is dated.	3		
15.	Each entry in the record contains the practitioner's name <u>or</u> initials, and professional designation.	3		
16.	The medical record is legible.	3		
17.	The medical record is electronic.	N/A		N/A
SCORING		Total Possible Points	Total Actual Score	Final Score %
<ul style="list-style-type: none"> ▪ The maximum possible points are 100. ▪ Do not include N/A criteria in "Total Possible Points" calculation. Mark N/A criteria as N/A in the "Score" column. ▪ $(\text{Total Actual Score} / \text{Total Possible Points}) \times 100 = \text{Final Score \%}$ ▪ 85% is the minimum passing score. 				%
<u>Comments:</u>				
Was a copy given to practitioner?			Is a corrective action required?	
Is a re-audit necessary?			Target follow-up date, if applicable?	