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Surveillance Nurse Visit Checklist (Home Nursing):

The agency manager or his/her designee is to be available for the survey when the nurse surveyor(s) arrive to comply with 245.110 Section a) b) c). Failure of an agency to be available for or refuse to allow a survey by an IDPH nurse during regular business hours may subject an agency to a fine and other administrative proceeding. Nursing agencies should have the nursing supervisor available in person or by phone. Surveys may include record reviews, interviews, phone interviews, and client or patient home visits (with consent).

Materials to have prepared for the surveillance nurse before their arrival:

- ☐ Policy and procedure manuals
- ☐ Bylaws
- ☐ Governing body meeting minutes
- ☐ List of current clients— (Private Pay, Private Insurance, DSCC, VA only) and the **start of care dates for each client**.
 - ***DO NOT include CCP, DHS, DORS ***
- ☐ List of past clients— (Past year with admission and discharge dates)
- ☐ List of current employees with position titles and **dates of hire**
- ☐ List of past employees (Past year with hired and termination dates)
- ☐ Current certificate of liability insurance
- ☐ Complaint log (and process)
- ☐ Employee training files
- ☐ Agency job descriptions
- ☐ Professional license(s)/IDPH Health Care Worker Registry verifications on staff
- ☐ Copy current IDPH license application (Initial/Renewal)
- ☐ Able to demonstrate access to the Health Care Worker Registry through the IDPH Web portal.
- ☐ Client plan of care
- ☐ Alzheimer's and dementia training curriculum or description of each class

****If your agency maintains electronic records, it is requested that one designated person from the agency be able to access this information in a timely manner for the surveyor's review on the date(s) of the visit. Failure to do so would place the agency in violation of 77 Adm. Code [245.110 c\)](#). The surveyor should be allowed to navigate the electronic record without interference. Agency staff may sit with the surveyor to observe if the observation does not inhibit or delay the survey.**

****Potential Adverse Licensure Actions for failure to comply: 77 Adm. Code [245.130 a\)](#).**