CertifyOS

NCQA Survey **Checklist**

Get (and keep) your organization survey-ready by following these essential steps.

◆ Preparation

Begin ≥12 months before expected survey start date.

Assemble an accreditation taskforce. Your team should consist of subject matter experts (SMEs) with clearly defined roles and responsibilities, including an administrative lead.

Review the survey application. Pay special attention to the standards and requirements for your particular program type, as well as the specific eligibility criteria you must meet.

Purchase the correct NCQA Standards & Guidelines and Survey Tool (*if submitting*)**.** New Standards & Guidelines (S&Gs) go into effect July 1st of the related standard year.

Conduct a mock file review. Perform a mock file review 12 months in advance of your expected start date to identify any gaps to remedy issues up front so that the entire lookback period is covered to prevent issues downstream in the survey process. Ongoing mock file reviews, at least annually, are a good best practice to catch any issues ahead of time.

Perform a gap analysis. Weigh your current processes against your program's S&Gs nine to 11 months prior to your expected survey start date. Set priorities for any necessary improvements, and lay out a reasonable implementation plan.

Identify automatic credit for delegated functions. Review qualifying criteria in the delegation appendix of your Interactive Review Tool (IRT). If eligible, gather required documentation, including a signed copy of your delegation agreement and a full list of delegated activities.

Schedule your survey. Obtain a pre-application form from NCQA at least nine months prior to your desired start date. Ensure your entire lookback period covers compliance with all requirements for the given evaluation product(s) when scheduling your survey start date. Once approved, you will receive a link to complete an online application and select a survey submission date.

Submission

Begin ≥12 months before expected survey start date.

Submit your survey. Once you have carried out the updates identified in your gap analysis, confirmed that they align with your NCQA program standards, and gathered all required materials, run a final quality check (or readiness evaluation) and submit your survey in the validation action of your IRT.

Note: *You will not be able to upload any documents updated after your submission date. Plan to submit your survey a few days or weeks in advance, leaving room for any surprises.*

Post-Submission

Spanning ~12 weeks after survey start date.

Conduct a mock file review. As you await your offsite evaluation and onsite/virtual file review, run through the expected program to identify and address potential issues upfront.

Review your preliminary report. You have about two weeks to review your preliminary report from NCQA and respond with any additional comments and/or documentation.

Receive your final report. Convene with your taskforce to ensure you have received all accreditation materials from NCQA, including your final score, certification, seal, and recommendations for elements scored <50%, or partially met for health plans.

* You should begin implementing any necessary quality improvements to address issues or deficiencies so that the lookback-period is covered for your next NCQA survey.

About CertifyOS

CertifyOS is NCQA-certified for 11 out of 11 CVO services (aka evaluation products), and we keep up-to-date on all changes to NCQA standards—so our clients are never caught off-guard.

With our provider intelligence platform, healthcare organizations get a single source of truth, where they can run one-click credentialing, manage documentation, run customized reports, and power their survey prep all in one place.

Reach out to <u>sales@certifyos.com</u> to request a demo.

Fully Certified by NCQA for 10 out of 10 verification services.