

## Home Care Document Request List

**Note:** This is a guideline. Additional information to include State specific requirements (as applicable) may be requested at any time during the site visit.

**\*Denotes policies/documents to be provided within first 2 hours of site visitor arrival**

Standard	Item	Comments
	<b>General Documents/Information</b>	
	*Billing Week	(IE; Week starts Sunday or Monday per agency policy)
<b>HCCC.3</b>	*Scope of Services	Identifies the services available and accessible to patients.
	*Clients Served	New clients within the past 12 months
	*List of Active Clients	Include date services started, DX, services provided
	*List of Discharged Clients	Termed within the last 30-60 days
	*Current Visit Schedule	
	List of Personnel Active/Termed	Include DOH, Position/Discipline
	Contracts	List of contract staff and interpretive services
<b>HCCC.1 HCEP.3 HCCC.3</b>	Sample Admission Packet	Include language specific documents
	<b>Quality Documents</b>	
<b>HCCC.1 HCCC.6</b>	Complaint logs/on-call logs	
<b>HCQA.1 HCQA.2</b>	Performance Improvement Activity/projects	(IE: Quality Indicator Tracking Data; Client Satisfaction Surveys; Infection Control Surveillance)
	Most Recent Survey Results	From local, State or federal agency

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	<b>Policies and Procedures</b>	
<b>HCCC.5</b> <b>HCCC.6</b> <b>HCIC.1</b> <b>HCIC.4</b> <b>HCIC.6</b> <b>HCMG.1</b> <b>HCMG.7</b> <b>HCMG.8</b>	Policy manual(s) Service Specific Policies Human resources Administrative Operational Clinical	Infection Control, *Hand washing and bag technique policy
	<b>Governance Documents</b>	
<b>HCMG.1</b>	Governing Body-Person(s) who assume full legal authority over the organization.	
<b>HCMG.2</b>	*Service or Business License per State requirement	
	<b>Operational Documents</b>	
<b>HCGM.5</b>	*Organizational Chart	
<b>HCMG.7</b> <b>HCPS.13</b> <b>HCPC.12</b> <b>HCCE.12</b>	Orientation Program	As applicable per state
<b>HCPC.12</b> <b>HCMG.8</b> <b>HCPS.13</b>	Clinical Competency Documentation	For each staff type/discipline
<b>HCEP.1</b>	Emergency Preparedness Plan	All elements of the standard including implementation and testing.