

Site Visit Inspector Checklist – Independent Diagnostic Testing Facilities (IDTF Detailed SV)

To start each site visit, begin by accepting the job order in the VSI app. When the job order is in your Active queue, note the due date, and plan to conduct the site visit before the due date accounting for the possibility of a needed second attempt.

Preparing for the SV

- ☐ Make sure you have your SV Inspector badge and Letter of Authorization
- ☐ Look in the Job Order Details to find the address; check that the GPS directions are correct
- ☐ Review all Special Instructions: hours of operation, by appointment only, required call prior to the visit
- ☐ If a call is made before the site visit, record the details in Additional Comments and include the date and time of the call, phone number called, and the name and title of the person spoken to
- ☐ Review all required photos and photo specifications prior to starting the report
- ☐ Arrive to the location during posted hours of operation OR standard business hours of 9:00 AM to 5:00 PM Monday through Friday. Site Visits cannot be conducted during the normal lunch hour of 12:00 to 1:00 PM unless other lunch times are posted or on Sundays of federal holidays

Conducting the SV

- ☐ Park in a safe location and exit your vehicle—SVs cannot be conducted from inside the vehicle
- ☐ Open the site visit form and enter the date and time in the First Attempt section
- ☐ Take a photo of the **exterior of the facility** capturing the entire building to clearly show the facility type
- ☐ Navigate to the facility entrance and take a photo. The photo should be of the front of the **entrance as a patient would enter the specific facility in question** (either an exterior entrance or internal suite door accordingly) and should capture the address/suite number, business signage, and hours of operation—may require multiple photos at closer range to capture all required details
- ☐ Verify that the business name in the Job Order Details matches the business signage
- ☐ Upon entering the facility, start by introducing yourself and asking for someone to assist with the site visit—this is usually an administrator, office manager, or billing associate
- ☐ Ask if the provider operates a mobile unit and request that the mobile unit be present to conduct the site visit. In some instances, you may need to drive to a location where the mobile unit is operating in order to complete the site visit
- ☐ Enter the name and title of the employee(s) assisting with the site visit under Authorized Representative
- ☐ Answer the questions in the SV form according to what is present at the location. Required photos must be added at the bottom of the report in the indicated placeholders or by using the Add Photo function
 - ☐ Exterior of building—if there is no facility on site, photographs of street signs and/or landmarks surrounding location
 - ☐ Facility entrance (including business signage and hours of operation if posted)
 - ☐ How the facility is accessible to the disabled (how they enter the facility, NOT a handicap parking space)
 - ☐ Facilities for hand washing
 - ☐ Adequate patient privacy accommodations
 - ☐ The storage of business records—may be filing cabinet, locked computer screen, etc.
 - ☐ The storage of current medical records within the office setting of the IDTF, or IDTF home office, not within the actual mobile unit—may be filing cabinet, locked computer screen, etc.
 - ☐ ALL diagnostic testing equipment (including the equipment and the serial/registration number(s) on each piece of equipment)
 - ☐ Catalog of portable diagnostic testing equipment (if applicable)
 - ☐ Proof of liability insurance
 - ☐ Written complaint resolution procedures and forms

- ☐ Posted 42 CFR § 410.33 standards
- ☐ Diagnostic testing equipment calibration log
- ☐ Diagnostic testing equipment maintenance log
- ☐ All applicable federal and state licenses
- ☐ List of all technicians furnishing services at the IDTF
- ☐ List of supervising physicians supervising services at the IDTF
- ☐ Evidence that the IDTF is sharing their practice location (if applicable)

Completing the SV

- ☐ Review the entire report to check that it is complete and correct
- ☐ Check all photos to verify that they are clear and correct and confirm with a statement in Additional Comments
- ☐ Add any other Additional Comments to explain any abnormalities
- ☐ Enter the Executed On date
- ☐ Enter your printed name and sign
- ☐ Submit the report for review

After the SV

- ☐ Monitor your email for follow up questions or needs from the Quality Control team
- ☐ Make any necessary corrections in the form OR conduct a second site visit as required
- ☐ Communicate with the Help Desk or QC team to ensure the report is completed correctly and on time

Second Visit

- ☐ A full set of photos is required for every visit; this includes the exterior and entrance photos and any specific photos requested by the Quality Control team
- ☐ Follow all steps above and include the date and time of the visit in the Second Attempt section
- ☐ Explain why a second visit was required in Additional Comments

*This is a supplementary document. For full site visit instructions, reference the training guides available in the VSI app or on DFlow. Contact your Help Desk for questions.