CARF eChecklist Quick Reference

Access the eChecklist for a Survey

1. Log in to the surveyor website at http://surveyor.carf.org.
2. Click on the eChecklist icon to be directed to the eChecklist website.

   *Note: After accessing the eChecklist **Home** screen, create a shortcut or bookmark to this page. Doing so will allow you to access the eChecklist website while offline.*

2. Click the **+** icon next to the appropriate survey found in your assigned surveys list to expand the survey record.

3. Select the row for your individual copy of the survey (i.e., where your name appears in the **Assigned To** column). Click **Open**.

Note: Ensure that you open the individual version of the eChecklist using your preferred browser on the device you will be taking to the survey prior to going on the on-site survey. Opening the survey saves the file to your device's browser cache for later access while offline.

Rate Conformance to Standards

1. From the eChecklist **Home** screen, click to **Open** the appropriate survey record.

2. Rate standards for nonconformance or partial conformance (0 or 1), exemplary conformance (3), or mark standards that do not apply (NA) or whose conformance level has not been determined (U-Undecided) by clicking the appropriate radio button. *Ensure that you are only rating sections for which you are responsible.*

3. To rate a group of standard elements, first select the group by checking the box to the left of the standard's stem. Manually unselect ratable elements of the selected stem if appropriate. With the group selected, click the **Rate Selected Items** button and then select the appropriate rating button. Click OK to apply the rating. Once the rating is set, uncheck the box at the stem before moving on.

4. Use the comment field below the standard number and ratings to record recommendations (for ratings of 0 or 1 – edit the standard auto-text to write the recommendation), consultative suggestions (in any comment field associated with a 2 or is not ratable), and rationales for exemplary conformance (for ratings of 3). For standards rated as a 0 or 1, indicate whether the rating applies to all programs/locations or is specific to particular programs/locations using the Programs/Locations dropdown list.

5. Once all standards *in your section(s)* that will not be 2s have been rated (i.e., 0, 1, 3, NA), click the **Set All 2s** button. In the message box that displays, click the **Set Only Unrated to 2** button to rate the remaining standards as 2.

Merge Individual Survey Files into the Master Version

Note: Merging is a two-step process.

1. From the **Work on Survey** screen of your individual eChecklist file, click the **Submit for Merging** button.
2. Once your file has been submitted, you will be returned to the **Home** screen.
3. From the eChecklist **Home** screen, the Report Compiler will expand the **+** icon next to the appropriate survey to expand the survey record.
4. Select the individual survey record that you wish to merge.
5. Click the **Merge** button.
6. Click **Proceed**.
7. Repeat the above steps until all individual surveyor files have been merged into the master version.

Enter Survey Summary Information

1. From the **Work on Survey** screen, click **View Survey Summary**.
2. Enter information related to the accreditation outcome and on-balance paragraph (if in the master version), survey changes, and strengths. Each strength should be entered in an individual box.
3. Click the **Survey** link found in the upper left-hand corner to return to the **Work on Survey** screen.

View the Exit Conference Notes

1. From the **Work on Survey** screen, click the **View Reports** dropdown.
2. Click the **Exit Conference Notes** button.
3. View the report in the browser or use the browser functions to save or print the report.

Note: The master is only available online. If you are working offline, run the Exit Conference Notes from the offline version of your individual copy.

Submit the eChecklist File to CARF

1. From the **Work on Survey** screen of the master eChecklist file, click the **Submit to CARF** button.
2. Resolve any errors as indicated.
3. Once the file has been submitted, you will receive a thank-you message.

Help and Support References

Support documents for the eChecklist can be found within the eChecklist and surveyor website (http://surveyor.carf.org/). To access support documents within the eChecklist, click on the **Help and Support** dropdown located in the upper right-hand corner.

- **eChecklist Quick Reference** - This document
- **eChecklist User Guide** - PDF file with the full User's Guide for the eChecklist

- **Accreditation Decision Making Guide** - PDF file with considerations for accreditation decision making on CARF and CCRC surveys
- **On Balance Automated Text** - PDF file that displays the automated text that will be included in the final accreditation report along with your on-balance paragraph
- **Surveyor Website Toolbox** - Helpful tips and resources for surveyors

CARF Staff

If you have questions about standards application or recommendations, please contact your CSU.

If you encounter difficulties with accessing or using the eChecklist, please contact the eChecklist Support team at CARF:
- By email: asc@carf.org
  Emails are monitored from 6:00am - 6:00pm MST, Monday through Friday.
- By telephone: (888) 281-6531 [if outside the US or Canada dial 001 (520) 325-1044], ext. 7005