eChecklist

User's Guide

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About the eChecklist

What is the eChecklist?

The eChecklist is the software designed for surveyors to use on surveys to assess conformance to CARF standards during a survey. This survey tool has been developed to help streamline the process of:

- Gathering and reporting accurate conformance ratings data for every surveyed organization.
- Determining the recommended accreditation decision of the on-site survey.
- Preparing for the exit conference at the end of the survey.
- Submitting survey data to CARF for further processing.

Device Requirements

What devices can I use the eChecklist on?

The eChecklist is a browser-based software that can be used on a variety of devices and operating system platforms. You can use the eChecklist on PCs, Macs, Chromebooks, tablets, and smartphones, although devices with a keyboard and mouse are recommended for greater usability. Please note that older versions of web browsers may not be supported. It is recommended that you use a web browser version from the list below to access your eChecklist surveys:

- Microsoft Edge®, version 13 or newer
- Google Chrome™, version 29, 45, 48, or newer

- iOS Safari®, version 8.4, 9.1, or 10.3
- Android™, version 4.4., 4.4.4., 50, or newer
- Chrome™ for Android, version 50 or newer

It is recommended that you use the most recent version of your browser for the best performance. For instance, the eChecklist works with iOS Safari version 9.1 and 10.3, but using the more recent version of 10.3 will result in faster and more reliable performance.

Working on a Survey

How do I access the eChecklist for a survey?

Once you have been scheduled for a survey, the associated eChecklist will automatically be created in your account at the time that the surveyor packet is sent. To access the survey, log in to the surveyor website at http://surveyor.carf.org.

You will be directed to a login screen. Enter your username and password and click "Sign in". (Your user name is your surveyor number followed by "@carfsurveyor.org". If you forget your password, click the **Forgot my password** link to have a new password sent to you. If you have trouble logging in, please contact the account services coordinators at asc@carf.org or (888) 281-6531 [if outside the US or Canada dial 001 (520) 325-1044], ext. 7005.

Upon logging in to the surveyor website, you will click on an eChecklist icon on the home page to navigate to the eChecklist. When you arrive at the eChecklist, you will be on the Home screen, which includes a list of upcoming surveys that you are currently scheduled on, as well as any surveys you have completed within the past year. The survey with the latest survey start date will appear at the top of the list.

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.*

As a default, the survey screen will show only the *Master* survey. To locate your *individual* (personal) version of the eChecklist survey, click the **+** icon to expand the survey record. Open your individual version of the survey by selecting the row for the individual record assigned to you and then clicking "Open."

Saving an Offline Copy

Once you open the individual version of the eChecklist, a copy of the survey will automatically be saved in your browser cache for offline use. **You *must* open the survey while connected to the internet to create an offline copy of the survey.** Please ensure that you do so using your preferred device and browser before leaving for the on-site survey. If you don't do so, you will not be able to access the survey without an internet connection.

Note: *Check your browser settings to ensure that your browser cache is not set to automatically clear. If the cache does clear, you will not be able to access an offline copy of your individual version without first connecting to the eChecklist website and caching a new copy.*

Work on Survey Screen Overview

Upon opening an eChecklist survey record, you will be taken to the *Work on Survey* page. This screen is the main work area in the eChecklist. You will use this screen to:

- View the sections of the standards manual that are included in the survey.
- Enter conformance ratings for the standards.
- Enter recommendations, consultation, and exemplary rationale statements (collectively referred to as comments) that will be included in the accreditation report.
- Track the status of the survey and identify standards that are completed and standards that still require ratings and/or comments.

How do I navigate between sections of the survey?

You can navigate between sections of the applicable standards manual(s) by clicking on the section/subsection title in the menu that appears in the left hand panel. To select a subsection, click the **+** icon to expand the selected selection and then select the appropriate subsection title. The display on the right side of the screen will show a list of the standards in the selected section.

Note: *For Sections 2–5, the standards manual will be indicated to the right of the section title. If the survey is blended (applying multiple standards manuals), the applicable sections of the primary standards manual will be listed first, followed by any secondary manual(s) listed in order alphabetically.*

You can hide or view the menu panel by clicking the **Collapse panel/Expand panel** menu button (located above the menu panel). Hiding the menu increases the size of the ratings/comments area of the screen for easier data entry.

How do I rate standards?

The eChecklist utilizes CARF's standard conformance rating system (SCoRS®), which is a four-point ordinal scale, to apply standards ratings. These four points are used by surveyors to assess the conformance level of the program to each applicable standard rating element. The ratings available include 0 (nonconformance), 1 (partial conformance), 2 (conformance), and 3 (exemplary conformance). The eChecklist also provides radio buttons for marking standards as NA (not applicable) or U (undecided).

From the *Work on Survey* screen of the eChecklist, you can rate standards individually and enter any related notes, comments, recommendations, or consultation for each standard as you work, or you can use the group rating features to set ratings for an entire standard or for a selected group of standards all at once.

*Note: Be sure to rate only the standards that you are applying on the survey. **Do not** enter ratings for any standards or sections of standards for which other survey team members are responsible. Doing so will cause discrepant ratings.*

On the *Work on Survey* screen, select the section you want to work on from the menu panel on the left side of the screen. The standards for the section will be displayed on the right side of the screen, along with any ratings or comments that have already been entered.

To rate a group of standards:

- To set a group of standard elements (that share a common standard stem) to a common rating, click the checkbox next to the stem's standard text. The checkbox next to the stem and all ratable elements under the selected stem will become checked. You can manually unselect ratable elements under the selected stem if desired. Once the appropriate standard elements are selected, click the **Rate Selected Items** button. Select the desired rating from the radio button options that appear and then click **OK**. All ratable standards within the group will be assigned the selected rating. Once you are done with that standard, uncheck the box next to the selected stem before moving on. You will not be able to use the group rating on another standard if boxes are still checked.
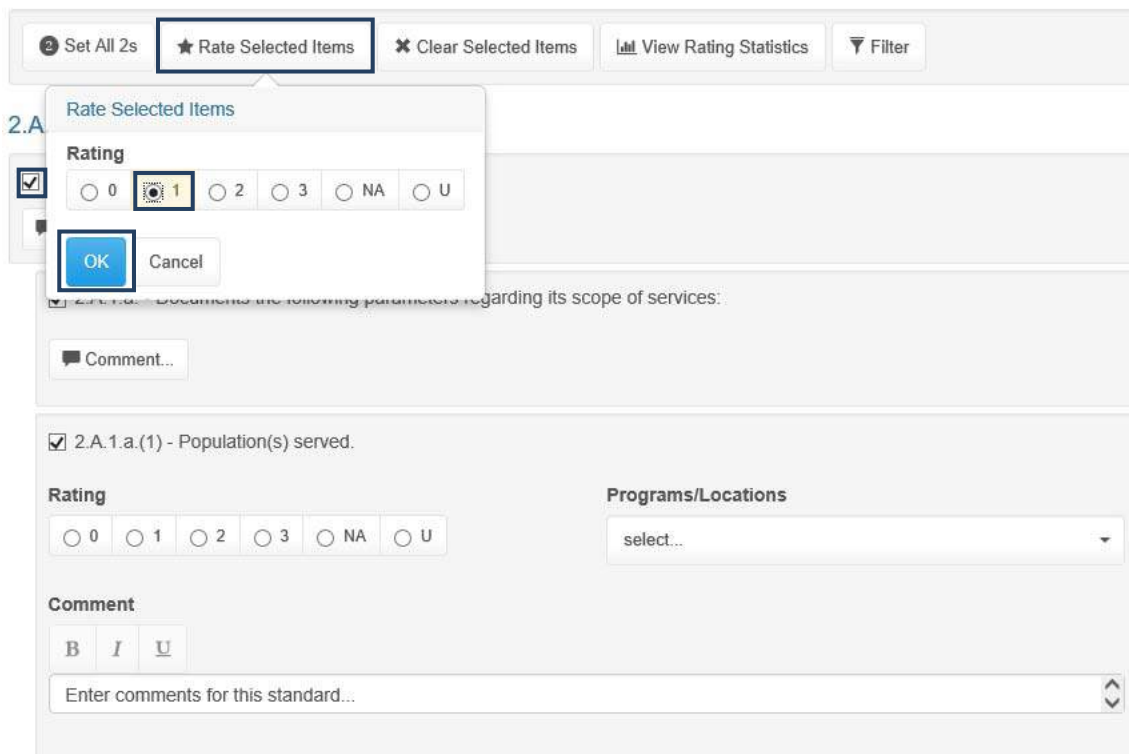
*Note: If standard rating elements within the selected section or group have already been rated, a warning will appear. Choose to **Override All Ratings**, **Set Only Unrated**, or **Cancel** the rating change.*

To set conformance ratings for individual standards:

Click the appropriate radio button under each ratable standard element to set the conformance rating for that item. Rating options are **O** (nonconformance), **1** (partial conformance), **2** (conformance), **3** (exemplary conformance), **NA** (not applicable), and **U** (undecided).

Note: *When you give a standard element a rating of **0** or **1**, the standard text will automatically be pasted into the associated comment field. Please adjust your comment, as appropriate, to provide a meaningful recommendation for the organization. If the organization is not in conformance to the standard, also indicate whether the recommendation applies to all programs/locations or if it applies to specific programs and/or locations.*

To set conformance ratings for a section/subsection:

Do this last!

- To set an entire section or subsection to a full conformance rating, select the section or subsection in the menu panel on the left, then click the **Set All 2s** button that appears above the standards area.
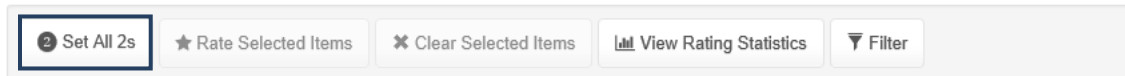
  A pop-up will appear with the following options, select **Set only unrated**. This process may take a few moments. A warning message will appear while your survey updates.
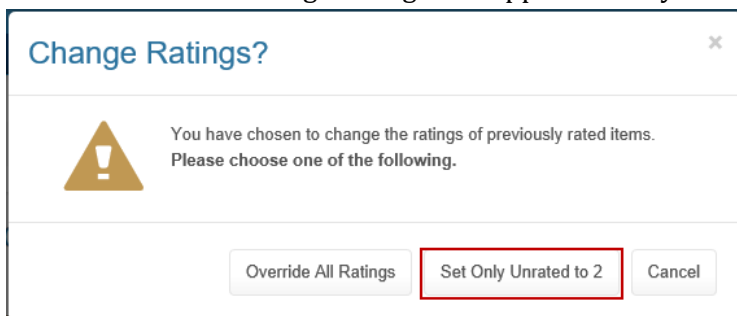
Note: *Use the Set All 2s button **only** on sections of standards where you are responsible for rating all standards in the section or subsection.*

Can multiple surveyors rate the same standards at the same time?

Yes, the eChecklist allows surveyors to rate the same standards at the same time by entering ratings into their individual version(s) of the survey. Upon merging the individual versions into the master version, if any differences exist in rating(s) or if more than one surveyor entered a comment, this will be indicated with a discrepancy icon. The survey team can then work collaboratively to determine the appropriate rating and comment, prior to submission to CARF.

Surveyors can also work together on a single individual version if they are all responsible for the same section(s).

Surveyor(s) should discuss standard assignments with their team at the start of each survey and only rate those sections for which they are responsible.

How should comments be entered into the eChecklist?

Recommendations, consultation, and exemplary conformance statements are all written as comments in the eChecklist.

- Recommendations: When a standard is rated 0 or 1, the comment box for that standard is automatically filled in with the standard text to help streamline writing the recommendation and ensure that it reflects the text of the standard. This text must be expanded on to write a complete recommendation. A recommendation may be combined with consultation, which suggests possible ways or idea for how the organization could achieve full conformance.
- Consultation: Consultation that is not combined with a recommendation must be entered into a comment box for either a nonratable standard or a standard rated 2. In the final Accreditation Report, consultation that is not combined with a recommendation is formatted under a *Consultation* heading and is not tied to a specific standard or group of standards. Each consultation should be entered into a separate comment box.
- Do not enter comments for standards / elements rated NA as they will not display on exit notes or survey reports

For more information on how to document survey findings, review *Documenting Survey Findings* available in the Surveyor Toolbox located on the Surveyor Website.

Is there a character limit for comment fields?

Comment fields allow you to include up to a million characters.

I have finished rating my assigned sections. How do I submit my survey for merging?

Once you have finished entering ratings and comments in your assigned sections/subsections of the survey, you can submit your individual survey for merging provided you currently have access to the internet. Before merging, verify that the *Last Offline Sync Time* is reflecting a time since your most recent changes were made. Only changes that have synced with the CARF servers will be merged. Also, verify your content is accurate by viewing the exit notes and rating statistics.

When ready to merge, click the **Submit for Merging** button found at the top of the *Work on Survey* screen. Once your individual version of the survey has been submitted, you will be returned to the *Home* screen.

Note: You must submit your individual survey for merging even if you are the report compiler, the only surveyor on the survey, or no data has been entered. Upon merging the individual version with the master version, you can submit the eChecklist to CARF.

As the report compiler, how do I merge in individual versions of the eChecklist?

The report compiler will merge individual versions of the eChecklist into the master.

To merge individual versions:

1. From the **Home** screen, expand the survey record by clicking the **+** icon to the left of the survey number.
   A list of individual survey records will appear.
2. Select the individual survey record you wish to merge. The individual survey must have a status of *Submitted for Merging*.
3. Click the **Merge** button.
   A screen will appear asking that you confirm the merge process.

4. Select **Proceed** to continue with the merge process.

5. Once the merge process is complete, the individual survey record will update to a status of *Merged.* Repeat the merge process for all individual versions of the survey that have been submitted for merging, including the report compiler's individual version.

How do I edit the master version of the eChecklist?

Once all individual versions of the eChecklist have been merged into the master, the survey team should review the master eChecklist and make edits as necessary. From the *Home* screen, select the master version of the eChecklist and click **Open**. The master version can only be opened while you are online.

Note: Only the report compiler will be able to edit.

Within the master version of the eChecklist, you will be able to resolve discrepancies in standard ratings and comments, review analytic tools such as the discriminatory standards, and finalize the survey summary.

How does the survey team resolve discrepancies?

If, after all individual versions have been merged, discrepancies occur (i.e., two or more surveyors have rated the same standards but have assigned different ratings), a **D** will appear to the left of the standard number to indicate the discrepancy.

If two or more surveyors have left comments for the same standard but have rated the standard the same, an **OR** (optional review) will appear to the left of the standard number to encourage the survey team to conduct an optional review of the comments.

*Note: The survey team must resolve all standards marked as a discrepancy (**D**) prior to submission. Standards marked as an optional review (**OR**) do not need to be resolved prior to submission, although it is strongly encouraged.*

To identify discrepant ratings and comments:

1. Click the **View Rating Statistics** button to see if there are any discrepancies or optional reviews in that section. This step should be completed for each section.
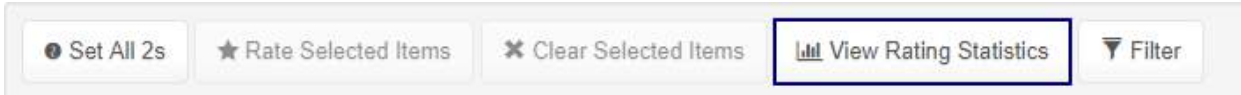
2. Use the **Filter** option to filter by **Discrepancy Status**.
3. Select a toggle button to apply the appropriate filter and then click **Apply Filter**.

To resolve discrepant ratings and comments:

1. Click the **D** (for discrepant ratings) or **OR** (for discrepant comments) that appears to the left of the standard number.
   Note: You will be navigated to the Resolve Discrepancy page. This page provides a read-only display of each surveyor's ratings and comments for the standard so that you can compare them and decide how to resolve the discrepancy. In the top portion of this screen, you can edit the rating and/or comment for the selected standard rating element.
2. The top portion of the page will default to the lowest rating and all surveyor comments will be appended together in this comment box. Individual surveyor ratings and comments will display below. Review to determine the final rating. Update the top portion of the page as appropriate.

3. Click **Save and Resolve** to save the changes or **Cancel** to return to the *Work on Survey* screen.

Once saved, the **D** or **OR** indicator status will update to an **R** (for resolved).

*Note: Once a discrepancy has been resolved and the **D** or **OR** is changed to an **R** in the display area, you cannot re-open the Resolve Discrepancy page to review the other ratings or comments after the discrepancy has been resolved.*

Helpful eChecklist Features

View Rating Statistics

Rating Statistics provides an overview of ratings and summary data that have been entered into the eChecklist. This information is useful in determining whether all standards within the selected section/subsection have been rated and what the rating distribution is.

To view the rating statistics:

1. From the *Work on Survey* screen, click **View Rating Statistics** in the menu bar that appears under the Section title.

Section 1 - ASPIRE to Excellence®

| ❷ Set All 2s | ★ Rate Selected Items | ✖ Clear Selected Items | ▥ View Rating Statistics | ▼ Filter |

2. Click **Hide Rating Statistics** to minimize this section of the screen.

| ❷ Set All 2s | ★ Rate Selected Items | ✖ Clear Selected Items | ▥ Hide Rating Statistics | ▼ Filter |

Section 1 - Summary Data

644	644	100 %
Total Ratable Standards	Total Standards Rated	Total Standards Rated

Breakdown by Rating

	Rated 0	Rated 1	Rated 2	Rated 3	NA	Undecided
Count	0	2	642	0	0	0
Percent (%)	0 %	0 %	100 %	0 %	0 %	0 %

Note: The rating statistics will only show values for the currently selected section or subsection. Navigate to different sections using the navigation panel to see the statistics for other sections. Use the filter option to find un-rated standards.

Filter Standards

Within the eChecklist, you can filter by rating categories, comments, discrepancy status, and discriminatory standards. The filter is applied to the currently selected section/subsection presented on the *Work on Survey* screen.

Note: The filter for discrepancy status and discriminatory standards is only available in the master version.

To filter standards:

1. Click **Filter** in the menu bar that appears under the Section title.

Section 1 - ASPIRE to Excellence®

| ❷ Set All 2s | ★ Rate Selected Items | ✖ Clear Selected Items | ⏸ View Rating Statistics | ▼ Filter |
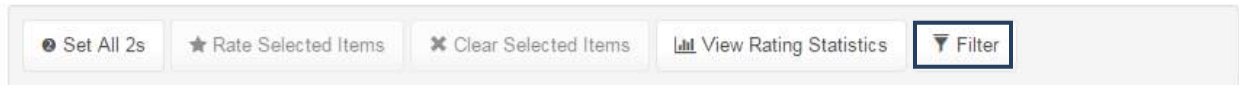
2. From the drop-down menu that appears, select to filter by rating, comments, discrepancy status, or discriminatory standards.

| ❷ Set All 2s | ★ Rate Selected Items | ✖ Clear Selected Items | ⏸ View Rating Statistics | ▼ Hide Filter |

Filter

Filter by

Rating ▼
Rating
Comments
Discrepancy Status
Discriminatory Standards

| ▼ Apply Filter | ✖ Clear Filter |
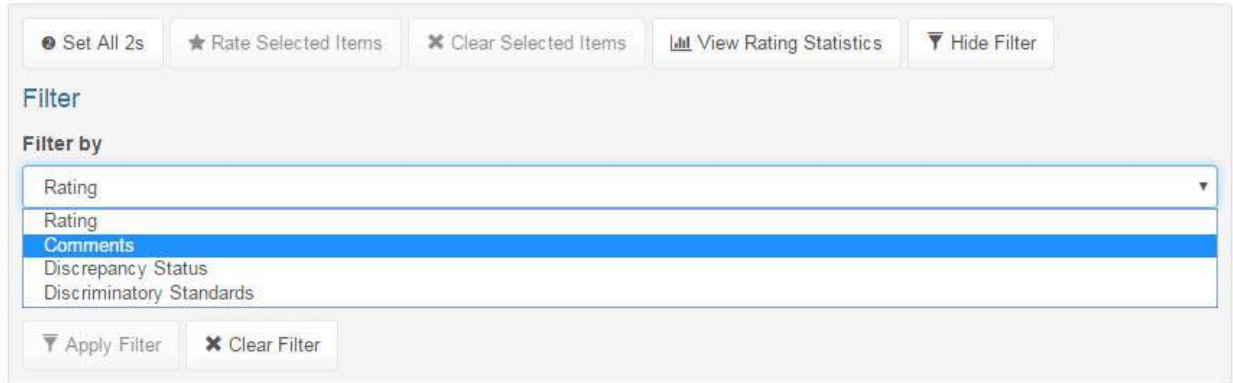
3. Select a toggle button from the options that appear.

Show only items that

◉ Have comments   ○ Do not have comments   ○ Rated 0 or 1 with a comment   ○ Consultation comments

| ▼ Apply Filter | ✖ Clear Filter |
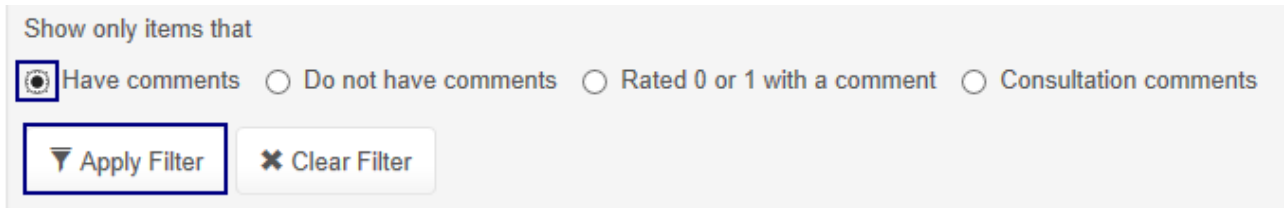
4. Click **Apply Filter**.
5. Once you are done reviewing the filtered information, click **Clear Filter** to remove the filter.
6. Click **Hide Filter** to minimize the filter options.

Search Standard Text

To improve the ability of surveyors to find related standards, the eChecklist allows users to search by standard text. Using this feature, surveyors can find standards that share a common key term.

To search standard text:

1. Type a term in the search box found near the top of the page.

Search   written procedures   🔍

2. Click the **Search** icon.
   Note: You will be redirected to a search results screen. All standards applied on the survey that include the search term within the standard text will appear.

Search Results: "written procedures"

Survey: 92047

Company: Inclusion Powell River Society • Powell River • BC

Manual(s): 2016 Employment and Community Services • 2016 Child and Youth Services

Section 2 - Child and Youth Services General Program Standards

2.A. - Program/Service Structure

2.A.9.a.(1) - When services are provided from or within a mobile unit, **written procedures** are implemented that address, at a minimum, the unique aspects of the following areas related to mobile settings: Responsibilities of: Drivers.

Rating

○ 0   ○ 1   ○ 2   ○ 3   ○ NA   ○ U

Programs/Locations

select...

Comment

Enter comments for this standard...

3. Review and make changes to the standards' ratings and comments, as appropriate.
4. To return to the *Work on Survey* screen, click the survey link that appears in the upper left-hand corner.

Home / Survey 92047 / Search Results

Note: The standard text search only searches for the keyword term within the standard text. This feature does not search the text located within comment fields.

Accreditation Decision Making

Summary Statistics

The Summary Statistics feature generates a report with a breakdown of ratings for each section and subsection of the standards applied on the survey. This analysis offers the survey team a way of assessing the organization's conformance to the standards at the subsection level.

To view the Summary Statistics report:

1. Click the **View Analytics** dropdown found near the top of the page.
2. Select the **Summary Statistics** option.
    A new tab will open in your web browser.
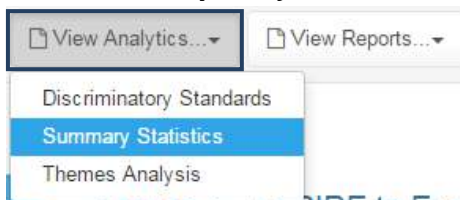
3. Use the scroll bar on the right side of the screen and the arrows at the top of the screen to review the entire report.
4. If you want to save a PDF version of the Summary Statistics report, click the **Export/Save** dropdown at the top of the screen and select **PDF**.

The report will be downloaded.
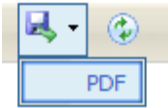
5.   When you are finished reviewing the summary statistics information, close the open tab and return to the eChecklist survey screen.

Note: This report is only available when working online. This is available in both master and individual checklists.

Themes Analysis

The Themes Analysis describes standards conformance patterns of surveyed organizations by standard theme; e.g., Input from Stakeholders, Accessibility. This benchmark analysis is based on aggregate standards conformance data from the past three standards manual years. Benchmarks for Section 1 are based on data from surveys applying any standards manual; other benchmarks are based on data from surveys that applied the standards manual being used; e.g., Behavioral Health.

The measure, Percent Conformance (% Conformance), is derived from a weighted rating of each standard rating element and aggregated over the standards under a standard theme.

Also included in this analysis, for your reference, is a table that displays the mean percent conformance for each theme and the middle 50 percent range. This range provides the top (75th percentile) as well as the bottom (25th percentile) percent conformance statistics in order to exclude possible outliers.

This information does not prescribe the accreditation decision for the current survey but is designed to provide the survey team with as much information as possible about the organization's conformance to the standards.

To view the Themes Analysis:

1.   Click the **View Analytics** dropdown found near the top of the page.
2.   Select the **Themes Analysis** option.
     A new tab will open in your web browser.
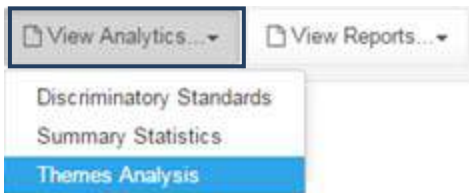
The Themes Analysis (Percent Conformance) screen is displayed, showing a bar graph that compares the current survey's percent conformance to the mean percent conformance of surveys by accreditation award: Nonaccreditation, One-Year Accreditation (including Provisional Accreditation), and Three-Year Accreditation.

The top bar for each theme (labeled Current Survey) presents the percent conformance to the standard theme for the current survey. The other bars show mean percent conformance to the

standard theme for organizations that received Nonaccreditation, One-Year Accreditation, and Three-Year Accreditation decisions.

Note: In cases where there are less than ten surveys that applied a given theme under a particular accreditation outcome, no bar will appear and a label will state "N/A, N<10". Please exercise caution when the comparison is based on a small number of surveys (i.e., 50 surveys or less).

3. For more information about Themes Analysis and additional comparative statistics, click the button labeled **More Info**.
4. When you are finished reviewing the themes analysis information, close the open tab and return to the eChecklist survey screen.

Note: The Themes Analysis report is only available when working online. This is available in both master and individual checklists.

Discriminatory Standards

Note: Discriminatory standards are not available for the Aging Services, CCRC, or Vision Rehabilitation Services versions of the eChecklist.

The Discriminatory Standards analysis feature summarizes the conformance ratings for the current survey on a subset of standards that have been identified by CARF (based on data from previous standards manual years) as *discriminatory* standards; i.e., standards that are frequently cited on surveys where the accreditation decision is less than a Three-Year Accreditation and infrequently cited on surveys with a Three-Year Accreditation decision. This information does not prescribe the outcome but is intended to help the survey team determine the recommended accreditation decision.

This feature should be used only after the survey is complete and all applicable standards have been rated. For this reason, the Discriminatory Standards analysis feature is only available in the master version of the eChecklist. More detailed information about how to use this feature is provided with the specific information for the current survey.

***To view the Discriminatory Standards analysis:***

1. Click the **View Analytics** dropdown found near the top of the page.
2. Select the **Discriminatory Standards** option.
   A new tab will open in your web browser.
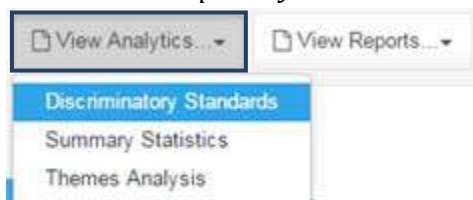
   On the Discriminatory Standards analysis screen, statistics are provided for the rating distribution for the entire survey and specifically for standards indicated by CARF as being discriminatory. The totals shown on the left side of the screen are for all standards applied on the survey, while the totals shown

on the right side of the screen summarize the conformance pattern only for the discriminatory standards.

3. When you are finished reviewing the discriminatory standards information, close the open tab and return to the eChecklist survey screen.

<u>Note:</u> *The discriminatory standards and related information are confidential and should not be shared with the organization. The Discriminatory Standards report is only available while working online in the master version.*

Completing a Survey

Updating the Survey Summary

In the Survey Summary section of the eChecklist, members of the survey team provide information to CARF related to the recommended accreditation outcomes, changes to programs/locations, strengths of the program, and the on-balance paragraph.

To update the Survey Summary information:

1. Click the **View Survey Summary** button near the top of the page.
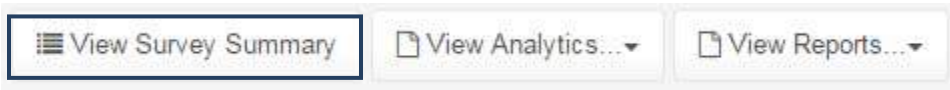
   In an individual version of the survey, sections will appear to identify changes and enter strengths. The master version contains additional sections to enter a recommended accreditation outcome and on-balance paragraph.

2. Review and make changes to the survey summary information, as appropriate.

   Note: Each strength should be entered in an individual box.

3. To return to the *Work on Survey* screen, click the survey link that appears in the upper left hand corner.

Exporting the Exit Conference Notes

The eChecklist provides the Exit Conference Notes feature to facilitate the process of completing your exit conference at the organization. Recommendations and consultation entered in the eChecklist and survey summary information are automatically included in the appropriate sections of the exit conference notes.

The Exit Conference Notes report can be generated from the master version after all individual versions have been merged <u>or</u> the individual versions. The report can be run from an individual eChecklist even if the user is working offline.

Note: This feature does NOT provide a finished accreditation report. You will still need to thoroughly review the eChecklist master version, correct any problems, and finish filling in necessary information before submitting to CARF.

To view the Exit Conference Notes:

1. Click the **View Reports** dropdown found near the top of the page.
2. Select the **Exit Conference Notes** option.
    A new tab will open in your web browser.

3. Use your browser's built-in save and print functions, as appropriate. You may need to right-click on the open page for options to appear.

Note: The Exit Conference Notes report times out after 9 minutes. If it takes longer than that to run, please contact eChecklist technical support for assistance.
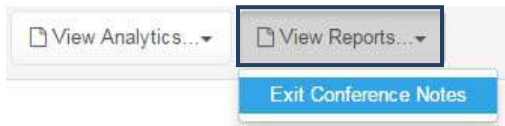
Submitting the eChecklist to CARF

After the survey is completed and conformance ratings have been finalized for all applicable standards, the last step is to submit the master eChecklist to CARF within 5 days. To do so, click the **Submit to CARF** button found at the top of the *Work on Survey* screen of the master eChecklist.

The eChecklist system will automatically run validation checks on the master version to ensure that all necessary components are included (e.g., all standards rated, individual versions merged, and survey summary completed) and that issues have been resolved (e.g., discrepant standards). If you receive a submission error, click **OK** to return to the *Work on Survey* screen. Resolve the identified errors before resubmitting the survey.

In some cases, the eChecklist will return a submission *warning*. This warning is to notify the team of sections containing no recommendations *or* consultation prior to submission. You may choose to make additional edits to the eChecklist or continue with the submission.

Once the survey has been submitted, you will receive a thank-you message and be returned to the *Home* screen.

Frequently Asked Questions (FAQs)

How do I tell if I am connected to the internet while using the eChecklist?

Certain functions within the eChecklist require access to the internet in order to run. To check your internet connection status, locate the indicator in the upper left hand corner of the screen. A green box will display with the words "Working Online" if you are connected to the internet.

The organization wishes to add/drop a program. How do I update my eChecklist survey?

Any added or dropped programs must be approved by a CARF staff member. If an organization notifies you that it wishes to add or drop a program, this must be done prior to or during the orientation conference. To add or drop a program from a survey, contact a CARF resource specialist at (888) 281-6531 [if outside the US or Canada dial 001 (520) 325-1044]. If the program change is approved, the eChecklist will be modified for you. Please allow one to two hours for the change(s) to occur in your eChecklist if you are working online. If you are working offline, the changes will occur when you next connect to the internet.

Can I copy and paste information from an external document into the eChecklist?

You can copy and paste information from an external document, such as a Word file, into the eChecklist. To do so, select the information that you would like to copy from the Word document, select the comment field to paste it into in the eChecklist, and either right-click and select paste or press **Ctrl+V** on your keyboard.

How do I use the eChecklist on a blended survey?

A blended survey is a survey that uses two or more standards manuals (e.g., BH and ECS). If a survey is blended, the appropriate sections from each standards manual will automatically be pulled into your eChecklist. The standards manual for each section is indicated to the right of the section title in the menu panel. Sections from the primary standards manual will be listed first, followed by any secondary manual(s) listed in order alphabetically.

A surveyor submitted the survey for merging but wants to make additional edits. How do I, as the report compiler, assign the survey back to him/her?

If a surveyor has submitted his/her individual survey and wishes to make additional edits prior to the master version being submitted to CARF, the surveyor should contact the report compiler and ask to have the individual version reassigned. The report compiler can reassign the individual survey back to the surveyor by selecting the individual survey from the main menu and clicking **Assign to Surveyor**.

Surveys

	Survey Number	Company	City, State/Province	Status	Type	Assigned To	Survey Start Date	Available Offline
	92047	ABC International	Powell River, BC	In Progress	Master	2414 Jane Doe	Feb-08-2017	
✓	92047	ABC International	Powell River, BC	Submitted for Merging	Individual	2414 Jane Doe	Feb-08-2017	No
	92047	ABC International	Powell River, BC	In Progress	Individual	1234 John Doe	Feb-08-2017	
	92047	ABC International	Powell River, BC	In Progress	Individual	2345 Jean Doe	Feb-08-2017	
	92047	ABC International	Powell River, BC	In Progress	Individual	3456 James Doe	Feb-08-2017	
	92970	XYZ Corporation	Oklahoma City, OK	In Progress	Master	2414 Jane Doe	Feb-06-2017	

Can the survey team use a single eChecklist instead of merging multiple individual versions?

During the validation process, the eChecklist requires that all individual versions of the survey be merged into the master version prior to submission to CARF. However, the validation does not require that each individual version of the survey contain data. You can fill out your individual version of the eChecklist with as much or as little information as you deem appropriate. If you and your fellow survey team members decide to enter all data into a single individual version, you can do so, but all survey team members' individual versions of the survey must still be merged with the master survey (even if they contain no data).

Can multiple surveyors work together to rate a section/subsection of standards?

Multiple surveyors can work together to rate an organization's conformance to a section or subsection. However, the surveyors may find it useful to enter these ratings in a single individual version to avoid having to resolve discrepancies in the master survey. **Surveyors should not set ratings for standards for which they are not responsible.**

What do I do if I forget to bring a device for the on-site survey?

If you forget to bring a device to the on-site survey, you may work with another team member and enter your ratings and comments into his/her individual version of the survey. Please note, however, that your individual version of the survey will still need to be submitted for merging. To do so, you can log in to your eChecklist account from a team member's device to submit for merging *or* wait and submit for merging when you arrive at home.

Does the eChecklist include a spell check feature?

Although the eChecklist itself does not include a spell check feature, the browser that you are using may include this functionality. For example, to enable spelling correction in Microsoft Edge you would select the Settings and more (three-dotted button), select Settings in the menu, click on Languages, and then enable spelling correction.

How can I access the exit conference notes if I don't have internet access?

During the exit conference, you can present using the exit conference notes compiled by the eChecklist. You can access exit conference notes from both your individual version of the survey and the master version. In order to access the master version with comments from all merged versions, you must be connected to the internet. However, your individual version of the survey can be accessed without internet connection if you have not yet submitted for merging. Members of the survey team can use their respective individual exit conference notes to present findings at the exit conference.

Can I present the survey findings from a device at the exit conference?

Surveyors are encouraged to present survey findings from a device at the exit conference.

Will CARF send a paper checklist to surveyors?

In previous years, CARF has sent a paper version of the checklist for surveyors to use to document findings during the on-site visit. Until further notice, CARF will continue to send paper versions of the checklist with the surveyor packets. In future years, however, this may be discontinued based on surveyor feedback.

Can I zoom in on the screen while using the eChecklist?

You can use your browser's built-in functions to zoom in and out of a screen while using the eChecklist.

Is there a way to make the eChecklist high contrast for visual accessibility?

Some users may wish to view the eChecklist in high contrast for visual accessibility reasons. Although the eChecklist itself does not have a high contrast setting, you can apply a high contrast theme to your computer that will update the view of all computer applications. To change the theme on your computer to high contrast, access the **Ease of Access Center** in your **Control Panel** and select the **Set up High Contrast** option.

Note: *For some computers, you can use the keyboard shortcut **ALT + left Shift + Print Screen** to turn on/off the High Contrast display theme. If you are using Chrome, the high contrast setting must also be turned on within the browser.*

Preparing for Your Survey

What should I do to prepare to use the eChecklist on my upcoming survey?

In addition to all of the other preparations for your survey, **it is important to make sure that you have saved a local copy of the eChecklist to your browser cache prior to leaving for the on-site survey.** If you don't open the individual version on the device/browser that you'll be using in advance, you will not be able to access the survey unless you have an internet connection.
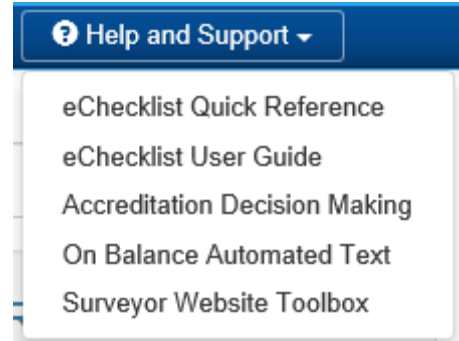
eChecklist Support and Resources

What resources and training are available for learning how to use the eChecklist?

The Surveyor Website includes helpful documents (e.g., Documenting Survey Findings, eChecklist Quick Reference Guide) and training modules that you can use to familiarize yourself with the eChecklist. A practice eChecklist environment is available, which allows you to take information learned in training and experience it hands on. The practice eChecklist can be accessed by selecting the *Training* dropdown and choosing *Practice eChecklist.*

Help and Support References

Support documents for the eChecklist can be found within the eChecklist and on the 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. Everything but the Surveyor Website Toolbox is available offline.

- **eChecklist Quick Reference** - PDF file with instructions for using the main features of the eChecklist
- **eChecklist User Guide -** This document
- **Accreditation Decision Making Guide** - PDF file with considerations for accreditation decision making on CARF and CCRC surveys
- **On Balance Automated Text** – PDF file with information about the automated text that displays in the final accreditation report, to reduce duplication
- **Surveyor Website Toolbox** - Helpful tips and resources for surveyors

Support from CARF Staff

If you have questions about standards application or recommendations, please contact a resource specialist from your customer service unit.

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