

Surveyor Guidelines During Orientation

The purpose of the Surveyor Guidelines During Orientation document is to provide a tool that sets expectations regarding the role the surveyor must play in their orientation.

- Read required information on survey tasks and associated regulations as needed to complete an assignment and to successfully complete testing.
- Discuss learning needs with preceptor.
- Communicate with preceptor on when surveyor feels comfortable with new tasks and taking on more survey guidelines.
- Communicate openly with preceptor and training officer on how surveyor is feeling about his or her performance and experience.
- Maintain field experience form and skills checklist for each survey experience.
- Assist preceptor in completion of surveyor evaluation forms after each survey experience.
- Complete all assigned survey forms.
- Discuss survey findings with the preceptor before giving findings to the facility staff.
Note: Survey findings are shared verbally; surveyor notes or other documentation should never be shared with the provider.
- Have fun and enjoy your learning experience.