

Team Analysis and Decision Making  
Task Analysis

Information analysis and decision making builds on discussions of the daily team meetings, which should include discussions of observed problems, areas of concern, and possible failure to meet requirements. Preceptor leads/mentors can use this tool to track the development with new surveyors, while allowing them the opportunity to integrate new surveyors with other preceptors, surveyors, and site teams for development.

Directions: Preceptors will observe and discuss the items as appropriate after each survey item is completed. The preceptor (P) and new surveyor (NS) must initial and date in the table area after each survey item is completed. After a new surveyor has participated in three separate surveys, the new surveyor will turn in the completed form to their lead preceptor/reviewer for final analysis, discussion, and initials to indicate and check-off participatory completion.

\*Associated training preceptors, mentors, and/or reviewers can add additional notes in the section below the table.

Item	Participatory Survey #1	Participatory Survey #2	Participatory Survey #3
The surveyor contributed to the discussion and by provided supporting documentation in the team’s compliance decision for each F-tag.	P: NS:  Date:	P: NS:  Date:	P: NS:  Date:
The surveyor participated in the team’s severity and scope decision for each F-tag cited according to the severity definitions in Appendix P, Psychosocial Outcome Severity Guide in Appendix P, and the Deficiency Categorization section as applicable for the selected F-tag in Appendix PP.	P: NS:  Date:	P: NS:  Date:	P: NS:  Date:
The surveyor contributed to the team’s decision regarding Substandard Quality of Care (SQC) and/or immediate jeopardy findings. (This decision is the culmination of team discussions and sample supplementation throughout the survey.)	P: NS:  Date:	P: NS:  Date:	P: NS:  Date:

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Notes:

New Surveyor Initials: \_\_\_\_\_ Date Reviewed \_\_\_\_\_

Reviewing Preceptor Initials: \_\_\_\_\_ Date Reviewed \_\_\_\_\_