

Survey Day Logistics Checklist

The visit is won or lost on logistics long before anyone looks at clinical practice. Fill this in with the people who will actually be standing in the corridors.

How to use this checklist

Fill the Before the visit page two weeks ahead and assign a name to every line. A checklist with no owner is a list of intentions.

Print a copy of the Document request log per survey day. Enter a time for every request, even when the answer is "it is on the way".

The lunch and prayer times line is the one everybody forgets and everybody notices. Agree them at the opening meeting and write them on the run sheet.

Fill the After the visit page on the last day, not the following week. The kickoff date for the corrective action plan is the last thing you decide and the first thing a surveyor asks about.

Write your own answer in the notes column. Do not paste in a surveyor checklist you found somewhere: your facility knows its own gaps better than a downloaded list does.

Before the visit

assign an owner and a date to every line

Done	Item	Owner	Done (date)	What good looks like here
	Dates confirmed			Arrival and departure times agreed in writing, with the names and mobile numbers of the people we are meeting.
	Meeting room booked			A room for the opening and closing meetings, with enough seats for the surveyors and everyone they asked to attend, and a projector or screen if you plan to present.
	Escort list agreed			One named escort per surveyor for the whole visit, plus a named deputy for each. An escort who is covering two surveyors is an escort for neither.
	Document access arranged			Read access to the systems and folders the surveyors asked for before they arrive, with login details that work and a test that they worked.
	IT and records access			Access to the incident system, the audit system, the training record system and the document control system, tested on the actual accounts you are giving them.
	Staff roster available			The roster for the visit dates, including nights and weekends, so the surveyors can be shown the whole week rather than one shift.
	Leadership availability			Which leader is present on which day, and who is the decision maker if a finding needs an answer that day.
	Parking and badges			Parking arrangements, the entrance to use, and badges waiting at reception under the surveyors' names.

Done	Item	Owner	Done (date)	What good looks like here
	Opening meeting held			Who ran it, who attended, and what was said about the schedule for the day.
	Escorts in place			Every surveyor has their escort from the opening meeting to the closing meeting, and the deputy knows they are on.
	Document request log started			The first request goes in the log with a time, even when the document is handed over verbally.
	Lunch and prayer times agreed			Said out loud at the opening meeting, and written on the run sheet. A survey day planned back to back with no break is a day that runs late.
	Daily debrief with leadership			What was asked, what was seen, what was requested, and anything you promised and the date. Written the same day, while it is still accurate.

Time requested	Requested by	Document	Provided by	Time provided
09:00		Policy and procedure manual		
09:20				
09:45				
10:10				
10:35				
11:00				
11:25				
12:00				
12:35				
13:10				
13:35				
14:00				

Copy this page for every survey day. A request entered after the fact cannot be checked, and a request with no time against it is the request that gets asked for twice.

Done	Item	Owner	Done (date)	What good looks like here
	Closing meeting notes			What was said in the closing meeting, and what was and was not answered. Written the same day.
	Findings captured			Every finding and every document promise recorded, with the date it was given. Nothing lives in a notebook.
	Corrective action plan kickoff date			The date the corrective action plan is started, and who chairs it. An open-ended CAP start date means it starts at the next survey.

Notes and things to fix next time