January 29, 2018

Q: I was reading over a PowerPoint linked in one of the IHCA newsletters and ran across this slide—that indicates that the president of resident council, ombudsman and up to two interested residents should be present for the exit conference. I do not believe in the homes I am familiar with, that these individuals have been involved. Is this something that is required, and who is to initiate that they be present for the exit?

A: Noted below is the language out of the Surveyor Procedure Guide. It is the responsibility of the surveyors to invite the others noted to the exit conference.

**Long Term Care Survey Process (LTCSP) Procedure Guide Effective November 28, 2017**

**Step 24: Exit Conference with Facility**

- Conduct an exit conference with the facility administration/leadership to inform the facility of the survey team’s observations and preliminary findings.
- **Invite the ombudsman and an officer of the organized residents group, if one exists, to the exit conference. Also, invite one or two residents to attend. The team may provide an abbreviated exit conference specifically for residents after completion of the normal facility exit conference. If two exit conferences are held, notify the ombudsman and invite the ombudsman to attend either or both conferences.**
- Do not discuss survey results in a manner that reveals the identity of an individual resident. Provide information in a manner that is understandable to those present, e.g., say the deficiency “relates to development of pressure ulcers,” not “Tag F686.”
- Describe the team’s preliminary deficiency findings to the facility and let them know they will receive a report of the survey which will contain any deficiencies that have been cited (Form CMS-2567).
- If an extended survey is required and the survey team cannot complete all or part of the extended survey prior to the exit conference, inform the Administrator that the deficiencies, as discussed in the conference, may be amended upon completion of the extended survey.
- During the exit conference, provide the facility with the opportunity to discuss and supply additional information that they believe is pertinent to the identified findings. Because of the ongoing dialogue between surveyors and facility staff during the survey, there should be few instances where the facility is not aware of surveyor concerns or has not had an opportunity to present additional information prior to the exit conference.
- If your state provides the sample list during the exit, click the Reports icon; select the “Sample List Provided to Facility” report; click **Run Reports** and then send the report in a secure method electronically OR print the report. States may also elect to send the Sample List with the CMS-2567.