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| Virtual Inspection Checklist for Inspectors |

[ ]  Review the timeline for virtual inspections, and work with FACT’s Business Manager to coordinate assignments.

[ ]  Once assigned, review the following documents located on the Virtual Inspection page of the FACT website:

* + [*Timeline for Virtual Inspections*](https://fact.policytech.com/docview/?docid=270&public=true)
	+ [*Virtual Inspection Guidelines for Inspectors*](https://fact.policytech.com/docview/?docid=487&public=true)
	+ [*FACT Virtual Inspection Agenda Example*](https://www.factglobal.org/education-and-resources/general/virtual-inspection-resource-center/)
	+ [*Facility Virtual Tour Requirements*](https://www.factglobal.org/education-and-resources/general/virtual-inspection-resource-center/)
	+ [*Zoom How-To Guide for Virtual Inspections: Inspectors*](https://fact.policytech.com/docview/?docid=278&public=true)

[ ]  Identify the equipment that will be used to participate in the inspection. This includes:

* + Computer with microphone and camera.
	+ Two screens might be helpful.
	+ Headphones might be preferrable but are optional.
	+ Zoom should be updated to latest version. Do not use virtual background. Do not record or take screen shots. Do not save any documents with PHI.

[ ]  Identify the space that will be used to conduct the inspection. This it to be a quiet and private room. Do not use an office where you will be interrupted or where confidentiality could be breached by other employees entering.

[ ]  Review logging into and navigating the FACT Accreditation Portal. How-To Guides are available on the FACT Website in the [*Portal Resource Center*](https://www.factglobal.org/education-and-resources/general/portal-resource-center/). Contact the assigned coordinator if assistance is required.

[ ]  Review the compliance application in the FACT Accreditation Portal. The current list of documents required to be submitted in advance by the applicant program is unchanged. The coordinator will be marking certain standards as compliant during her review. This includes standards related to current licenses, minimum number of transplants, procedures, or products, and minimum number of hours of continuing education. Coordinators will not mark continuing education content as compliant and will leave it for your review. Documents marked by the coordinator as compliant may still be reviewed by the inspector if desired.

[ ]  Additional documents that must be submitted prior to the virtual inspections are:

* + Each SOP or policy that is referenced in the Quality Management Plan.
	+ A copy of the most recent Annual report on the Effectiveness of the Quality Management Program.

[ ]  Applicant programs may have updated documents or added new documents to the Document Library in the FACT Accreditation Portal. Review the *Virtual Inspection Documents* Tab to be sure you have reviewed the most current documents.

[ ]  Enter any Requests for Information from the applicant at least 4 weeks prior to the inspection and notify the coordinator to send to the applicant.

[ ]  Review the ways applicants might share documentation. There are 4 ways to electronically share documentation of compliance:

* + Sharing the screen of a computer – this works best for any documents or records that are saved electronically or can easily be scanned. The screen will automatically be the size of your zoom screen, there is no need to pin a video.
	+ Using a document camera – this works best for any documents or records that are saved on paper or cannot be easily scanned, such as a product collection or processing record or cleaning logs. The video may need to be pinned in *Speaker View* to view a large screen, depending on how the video is shared by the applicant. (Refer to the Zoom How-To Guide for Inspectors.) Note that a document camera is recommended but is not required for the applicant.
	+ Using the camera on a cell phone – this works best for showing small things that you cannot scan, like equipment tags, or initials on a form or log. The video will need to be pinned in Speaker View to view a large screen. Refer to *the* [*Zoom How-To Guide for Virtual Inspections: Inspectors*](https://fact.policytech.com/docview/?docid=278&public=true)*.*
	+ Submitting documents to the *Document Library* in the FACT Accreditation Portal under the *Virtual Inspection* tab – this works best for electronic or scanned documents, but must not contain any PHI, so should not be used for any patient records. It is the recommended method for any long documents that an inspector may want to review, such as SOPs or policies.

[ ]  Schedule the pre-inspection conference and Zoom training session with your coordinator approximately 3-4 weeks prior to the inspection.

[ ]  The Team Leader, inspection team, and Program Director are responsible for creating the Inspection Agenda. Be certain to include the names and cell phone numbers for all members of the inspection team. The agenda should be complete at least two weeks prior to the inspection. Once complete, the agenda must be sent to the Manager of Accreditation Services to create and fill-in the Zoom links and provide the inspectors the account information that will be used.

[ ]  Participate in the pre-inspection conference call with the Inspection Team and FACT Coordinator.

[ ]  Review the additional staff members who are scheduled to be interviewed during the inspection. Notify the applicant if additional interviews are requested.

[ ]  After training with your coordinator has been completed, practice how you will open and utilize the Zoom meetings to conduct the inspection. If you have any questions or additional training is needed, contact your coordinator.

[ ]  The day before the inspection, double check that Zoom is updated to the most current version and all connectivity and functionality of equipment in the spaces that will be used.

[ ]  Document the name and position of each person interviewed during the inspection, documents or logs reviewed that were not submitted to the FACT Accreditation Portal, and equipment or equipment tags that were viewed.