

HOW-TO: NAVIGATE THE APPLICATION (INSPECTOR)

FOR: Inspectors

DESCRIPTION: Overview of common terms and components of an application within the FACT Accreditation Portal.

PREREQUISITES:

- [How-To: Navigate the Portal-Inspector Guide](#), IT.GDE.8.026

PROCESS:

1. In the left navigation pane, select **My Inspections**.
2. Select the **Inspection Overview** link on the application tile to navigate to the *Inspection* area of the application.



FACT Demonstration Bone Marrow and Stem Cell Transplantation Program - TRAINING ORG On-Site Inspection
Compliance Common Application - Renewal







INSPECTION	INSPECTION REPORT DUE
12/02/2022	12/19/2022

 **COORDINATOR:**
Test, Coordinator
testCoordinator01@factglobal.org

Accreditation Report >
Application >
Quick View >

Inspection Overview >

Inspector Compliance Application Tile

-  My Applications
-  My Inspections
-  My Tasks
-  Help
-  Resources
-  **Application** ▼
- Site Checklist
- Tasks
- Personnel
- Document Library
- RFI Report
- **Inspection**
- Tools

Top Level Navigation

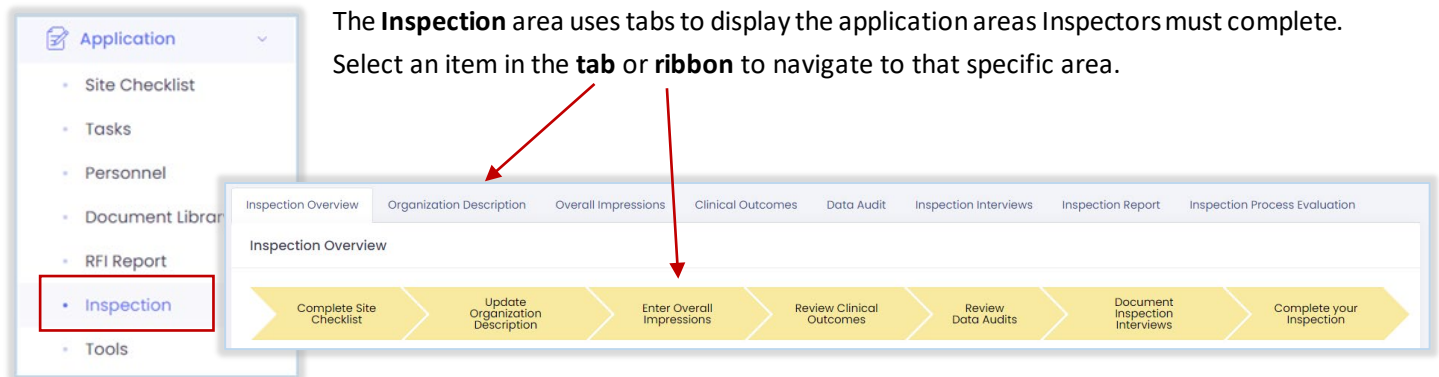
My Applications	A list of your organization’s applications.
My Inspections	A list of the applications where you are assigned as an inspector.
My Tasks	A list of tasks assigned to you or your organization.
Help	A link to Portal Resource Center that includes training resources.
Resources	A link to the FACT Inspector Resources page on the FACT website.

Application Specific Navigation

Site Checklist	The applicant responses where inspectors indicate compliance.
Tasks	Displays all tasks assigned to the organization and the status.
Personnel	Organization personnel and Inspectors associated with this application.
Document Library	Documents uploaded and associated with the related cycle.
RFI Report	All requirements and questions with visible RFI Comments. <i>(Only visible if RFI Comments are present within the application)</i>
Inspection	The inspector area of the application that includes a quick view of each inspector’s status on a ribbon comprised of tabs. These tabs change color as the items are completed. The inspector may select a tab to navigate to a specific area.
Tools	A quick link to the FACT Inspector Area on the FACT Website

Inspection

The **Inspection** area uses tabs to display the application areas Inspectors must complete. Select an item in the **tab** or **ribbon** to navigate to that specific area.

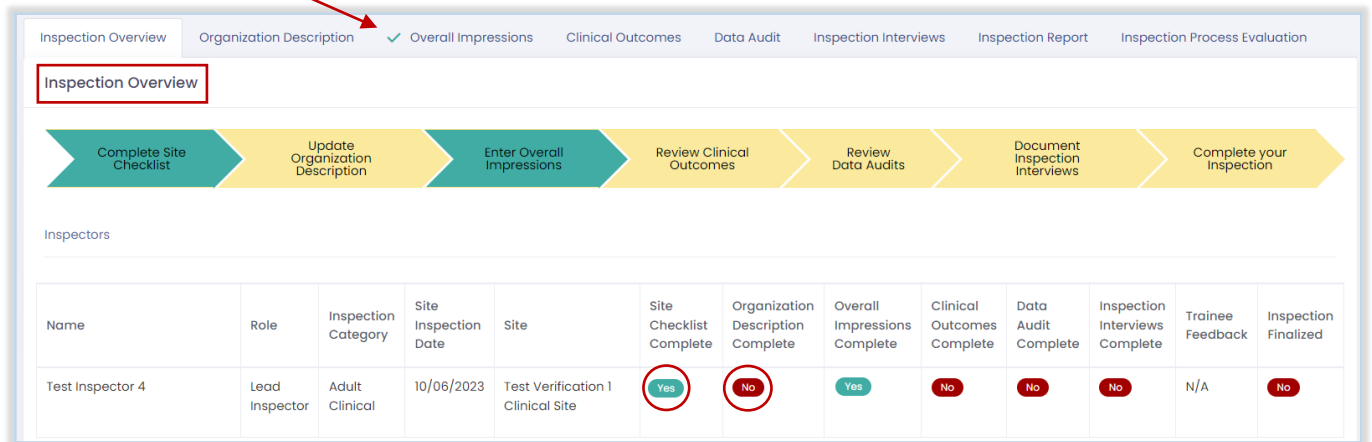


The Tab and Ribbon guide the Inspectors through the required items to review and complete:

Tab	Ribbon	
Inspection Overview	Complete Site Checklist	Review the Site Checklist that includes the applicant’s answers. Compliance is documented in this area.
Organization Description	Update Organization Description	Review the organization’s summary and suggest updates as needed.
Overall Impressions	Enter Overall Impressions	Provide information about the site inspected.
Clinical Outcomes	Review Clinical Outcomes	<i>(Clinical Inspectors Only)</i> Review the Clinical Outcomes results and CAP. Provide feedback as requested by the Clinical Outcomes Committee.
Data Audit	Review Data Audits	<i>(Clinical Inspectors Only)</i> Review the CIBMTR Data Audit results and CAP. Provide feedback as requested by the Data Audit Committee.
Inspection Interviews	Document Inspection Interviews	Document the interviews that were performed during the inspection.
Inspection Report	Submit Inspection Report	Review the overall Inspection Report to be submitted to FACT.
Inspection Process Evaluation	Complete Inspection Evaluation	Complete the Inspection Evaluation. <i>Note: the “Inspection Process Evaluation” tab redirects to an external website. A checkmark will not display upon completion.</i>

Inspection Overview

As the inspection tasks are completed, the yellow arrows change to green, and the tasks display as complete. A green checkmark will also display in the tab that has been completed. Return to this overview page at any time to track progress.

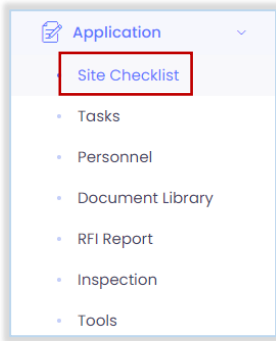


The screenshot shows the 'Inspection Overview' tab selected in the ribbon. Below the ribbon is a progress bar with seven arrows representing tasks: 'Complete Site Checklist' (green), 'Update Organization Description' (yellow), 'Enter Overall Impressions' (green), 'Review Clinical Outcomes' (yellow), 'Review Data Audits' (yellow), 'Document Inspection Interviews' (yellow), and 'Complete your Inspection' (yellow). Below the progress bar is a table of inspectors and their task completion status.

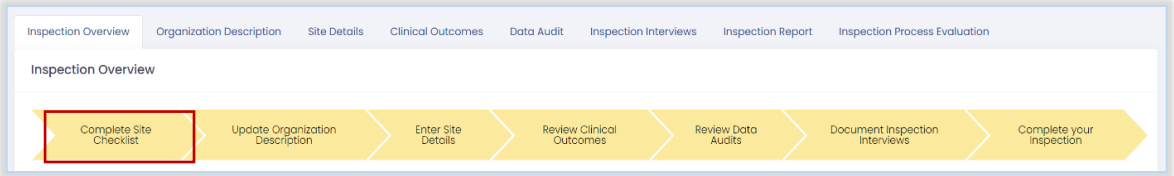
Name	Role	Inspection Category	Site Inspection Date	Site	Site Checklist Complete	Organization Description Complete	Overall Impressions Complete	Clinical Outcomes Complete	Data Audit Complete	Inspection Interviews Complete	Trainee Feedback	Inspection Finalized
Test Inspector 4	Lead Inspector	Adult Clinical	10/06/2023	Test Verification 1 Clinical Site	Yes	No	Yes	No	No	No	N/A	No

The *Inspection Overview* is the first tab in the Inspection area. It displays the inspection team, their tasks, and the inspection process. A red ‘No’ displays for tasks that are incomplete. A green ‘Yes’ displays for tasks that are complete. N/A displays for tasks that are not required.

Site Checklist



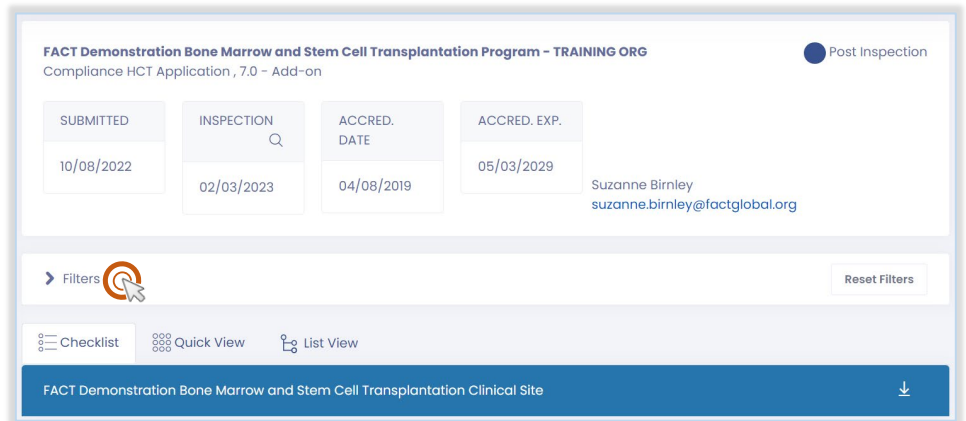
The Site Checklist contains all applicant responses used to indicate compliance with the standards. Access it by selecting the **Site Checklist** link in the left navigation pane or by selecting the **Complete Site Checklist** arrow on the Inspection Overview.



Within the Site Checklist, filters and additional views are available.

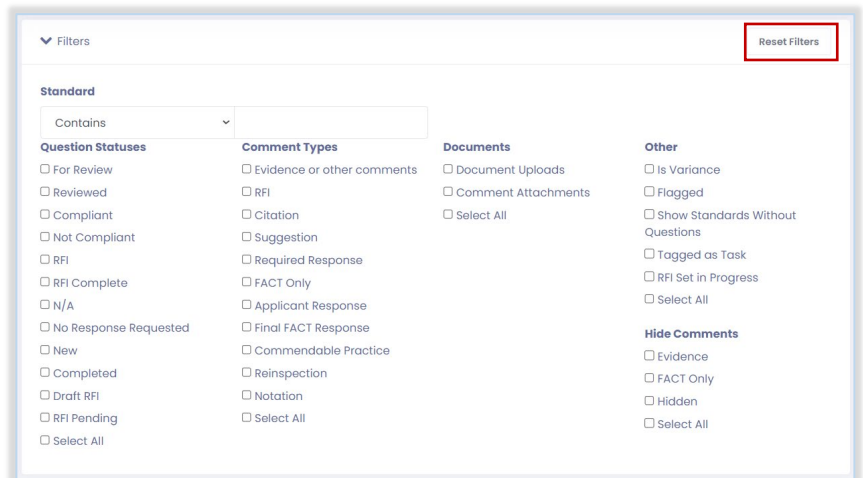
- **Filters**

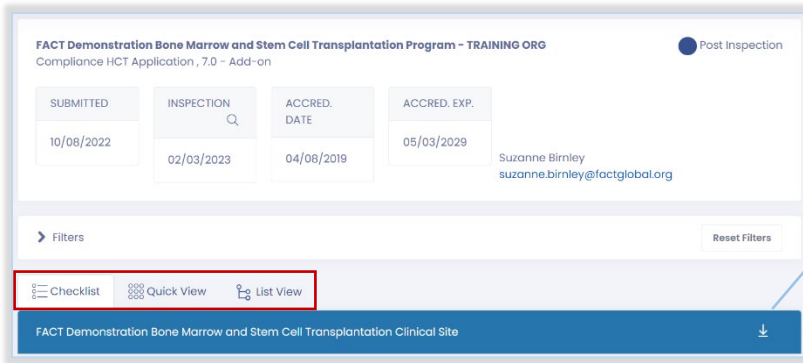
At the top of the Site Checklist, there are **Filters** available to quickly locate different standards as needed. The Filters section is minimized by default.



Expand the **Filters** section to search for specific standards by identifier, search for comments by type, or search for questions by status.

Filter settings are retained as users navigate between the **Site Checklist**, **Quick View**, and **List View**. Upon refreshing the page, the filters clear and return to their original settings. Users also have the option to select **Reset Filters** to clear the filter form.





Helpful Hint: Export this checklist to Excel by selecting the Download button.

- **Views**

- **Checklist**

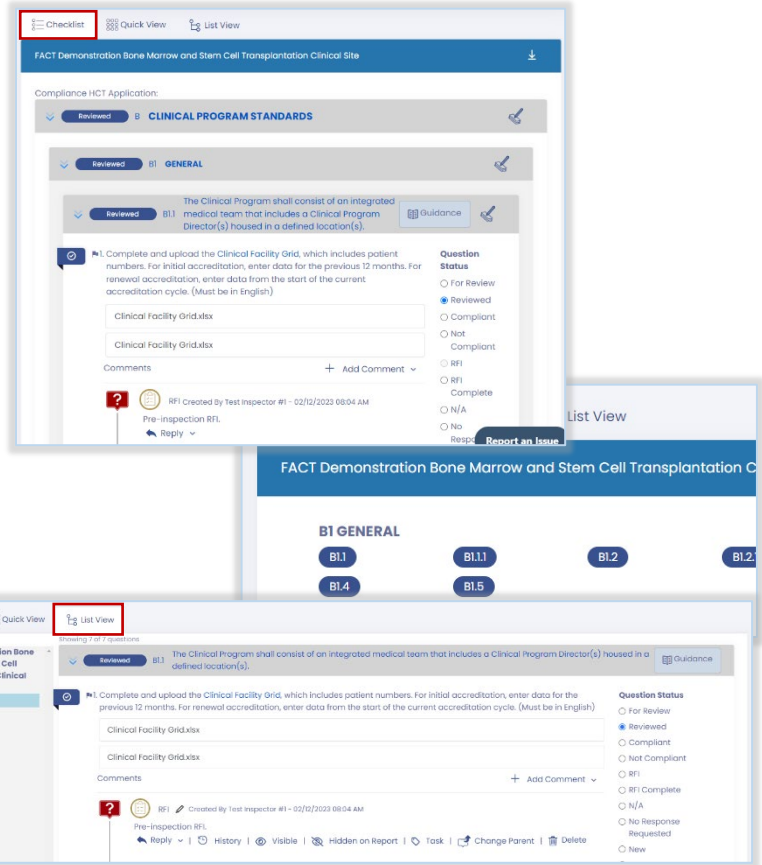
The checklist displays the application in the traditional accordion style. Expand the sections to view substandards and questions within.

- **Quick View**

Quick View displays the status of each standard individually to provide an overview.

- **List View**

List View lists all standards in a vertical list with the questions within displayed on the right.



Tasks

- Application
 - Site Checklist
 - Tasks**
 - Personnel
 - Document Library
 - RFI Report
 - Inspection
 - Tools

The Task area is used by the FACT Accreditation Coordinators to communicate additional requirements outside the RFI process. If applicable, the coordinator will inform the inspector of any relevant information.

Summary	Site Scope Types	Service Types	Task Type	Created Date	Open Date	Due Date	Show on Reports Status	Status
Clinical Outcomes Task Due with Compliance			Documentation Due at Annual Report	06/08/2023		08/08/2023	No	Draft

Showing 1 to 1 of 1 entries (filtered from 274 total entries)

Personnel

- Application
 - Site Checklist
 - Tasks
 - Personnel**
 - Document Library
 - RFI Report
 - Inspection
 - Tools

The Personnel area displays applicant staff organization and personnel assigned by FACT to the inspection, e.g., FACT Inspector, FACT Inspector Trainee, observer.

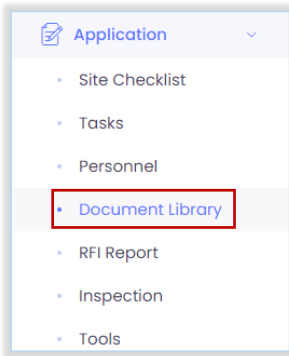
Full Name	Organization Role	Email Address	Can Login	Actions
Rockhead Slate, MD	Clinical Program Director	sbirney+slate@gmail.com	Yes	
Fred Flintstone, MD	Organization Director	sbirney+fred@gmail.com	Yes	
Wilma Flintstone, MD	Primary Contact	sbirney+wilma@gmail.com	Yes	

Showing 1 to 8 of 8 entries

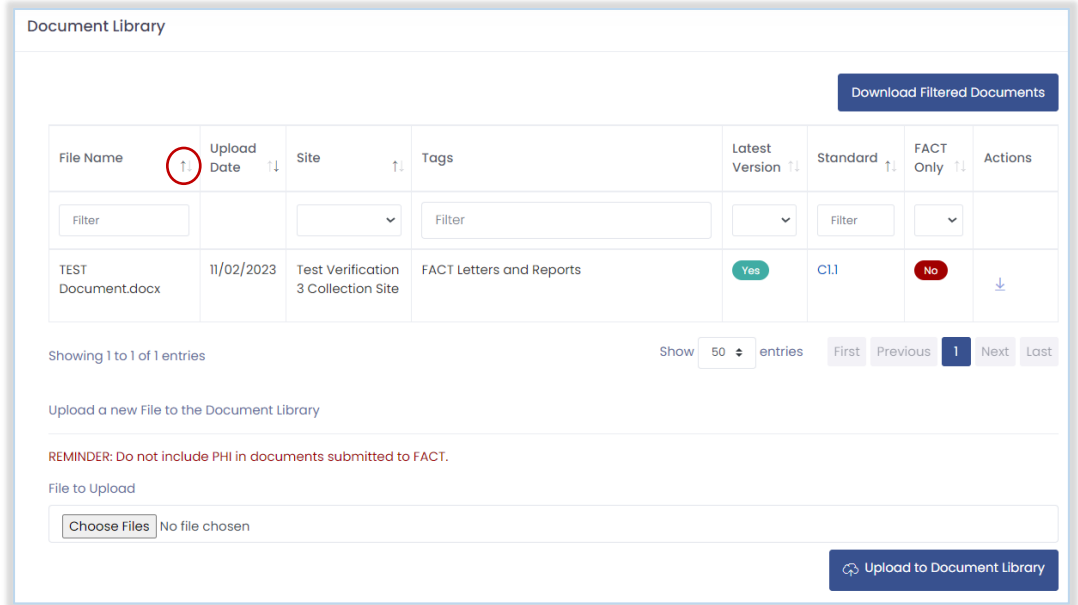
Name	Role	Inspection Category	Email Address	Site Inspection Date	Site	Actions
Test Inspector #1	Lead Inspector	Adult Clinical	sbirney+tl@gmail.com	02/03/2023	FACT Demonstration Bone Marrow and Stem Cell Transplantation Clinical Site	

Showing 1 to 1 of 1 entries

Document Library



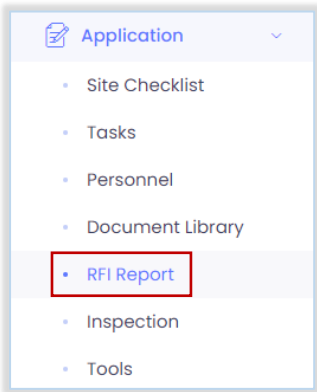
The document library provides a single location to access documents uploaded in the organization’s application. The documents can be sorted by using the ascending/descending feature in the column headers.



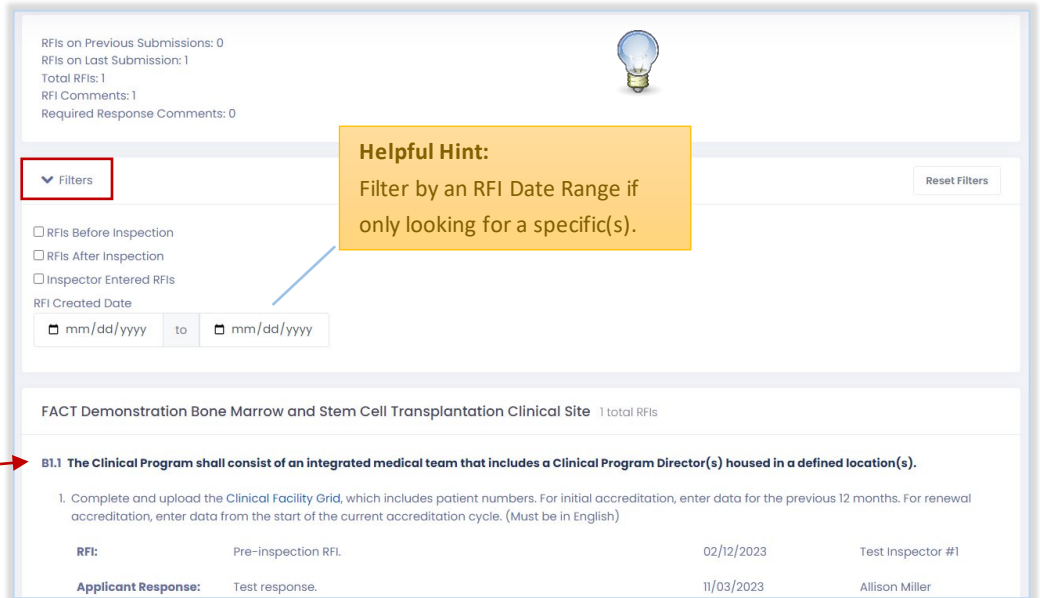
Document Library Column Headers

Download Filtered Documents	Bulk Document Download – Filter the document list and select the button. A message displays: <i>“Downloading the files now. This may take a minute. Please wait while we package the documents for you.”</i> Select OK to continue. A zip folder will be downloaded that includes the documents selected.
File Name	The file name entered during the upload process.
Upload Date	The date the file was uploaded to the portal.
Site	Displays files within a site checklist.
Tags	Displays document type: Pre-Inspection Evidence, Post-Inspection Evidence, Virtual Inspection Document, FACT Letters and Reports.
Latest Version	Indicates if the document is the latest updated version.
Standard(s)	Filter documents by standard. Select the standard to navigate to the <i>List View</i> for that standard.
FACT Only	Displays a green ‘Yes’ if document visibility is restricted to FACT Staff and the application’s Inspectors
Actions	Download the file.

RFI Report



The RFI Report displays the RFI Comments organized by site within the application. Filter by the specific comment or category by expanding the Filters.



Select the standard to access the RFI Response.

If the response contains a document, select the document name to download the attached file.

To print the RFI report, select **Print** located at the top right corner.



RECOMMENDED GUIDE(S):

- [How-To: Complete An Inspection](#) – Inspector Guide, IT.GDE.8.027