

Timeline	Task	Individual Responsible	Targeted Completion Date	Comments	Actual Completion Date
3 months	Agreements/contracts – utilize checklist to obtain. (See ANNA Manager Resource: Survey Readiness Checklist.)				
3 months	Place orders for equipment/furniture/supplies.				
3 months	Determine opening date in collaboration with management.				
3 months	Determine who may fill key management positions, i.e., nurse manager (NM), social worker, renal dietitian, biomedical technician (BMT).				
3 months	File all necessary regulatory forms (including CMS 855; 3427 Notification of Survey; 1513 Disclosure of Ownership; 116 CLIA Application; DEA Certificate) in addition to any requirements for state licensure/MA certification.				
3 months	Begin to identify open positions; place ads when necessary.				
3 months	Make artwork selection with input from medical director.				
3 months	Determine local permit requirements.				
2 months	Determine city/county occupational licensing requirements.				
2 months	Finances: • Accounts Payable • Accounts Receivable • Any other finance issues (dependent on facility)				
2 months	Complete/submit form for electronic billing.				
2 months	Order phone system.				
2 months	Reserve telephone numbers through local phone company.				
2 months	Order computer system.				
2 months	NM / BMT to begin working in new facility.				
2 months	Begin working to make manuals facility-specific.				
2 months	Determine patients who want to transfer.				
2 months	Finalize number of staff needed and hire for vacancies.				
2 months	Set up utility accounts/contracts (including water, electric, gas, oil, cable, and telephone).				
2 months	Obtain manuals/reference materials (have list); make binders/information facility-specific; review manuals with management team.				
1.5 months	Order signage, both exterior/interior.				
1.5 months	Set up Occupational Medicine Accounts for Workers' Compensation.				
1.5 months	Obtain State Board of Labor requirements for posting on staff bulletin board.				

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1.5 months	Establish continuous quality improvement (CQI) program.				
1.5 months	Notify Department of Health (DOH) surveyor of proposed opening date.				
1 month	Order all phone/fax/alarm lines from local phone company. Determine location and schedule installation.				
1 month	Order long-distance service.				
1 month	Confirm reverse osmosis installation is on schedule.				
1 month	Coordinate installation of computer equipment, including time clocks.				
1 month	Select overnight mail service pick-up (DHL/FedEx/UPS).				
1 month	Verify delivery of furniture/equipment is on schedule.				
1 month	Verify installation of dialysis machines is on schedule.				
1 month	Coordinate with BMT for installation of water room equipment.				
1 month	Order supplies (including medical, drugs, office, and lab).				
1 month	Complete inservices for staff for technical/OSHA/CLIA/hazardous waste programs.				
3 weeks	Do "walk through" using survey tool for survey readiness. (See ANNA Manager Resource: Survey Readiness Checklist.)				
3 weeks	Schedule an open house; place announcement in newspaper.				
3 weeks	Order patient/staff magazines.				
2 weeks	Work on patient/staff schedules.				
2 weeks	Create personnel files.				
2 weeks	Set up patient charts; verify insurance coverage.				
2 weeks	Inform patients transferring of schedule; contact patient transportation services regarding schedule.				
2 weeks	Receive equipment, furniture, supplies; tag assets.				
2 weeks	Set up/stock crash cart or BLS cart.				
2 weeks	Purchase office supplies.				
2 weeks	Order postage meter or purchase stamps.				
2 weeks	Order/schedule set up of copier/scanner/fax machine.				
2 weeks	Set up equipment/furniture.				
2 weeks	Count inventory and place reorder (approximately 4 weeks worth of supplies).				
2 weeks	Request petty cash from Accounts Payable Department.				
1 week	Purchase necessary supplies for coffee machine/ice machine if applicable.				
1 week	Negotiate linen/laundry service.				
1 week	Purchase housekeeping supplies, if not part of agreement.				

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1 week	Reconfirm opening date with DOH surveyor; assure all "outliers" from previous walk-through audit have been completed.				
1 week	Schedule patient(s) to dialyze on opening day, to date of survey.				
1 week	Post emergency evacuation plan.				
1 week	Obtain physician on-call list and post at nurses station.				
1 week	Schedule medical staff and other necessary meetings prior to first patient dialyzing.				
1 week	Schedule inservice on machines.				

Additional Information:
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- Developed by ANNA's Administration Special Interest Group -

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