4 Tips on How to Prepare for a CARF Survey

Tom Sefcik, ACSW, MBA
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Seeking accreditation from CARF is a goal that most organizations seek, but unfortunately, dread as well. It doesn't have to be that way when preparing for a CARF survey. As when one must take a test, or make a presentation, preparation for the survey is critical to success. A CARF surveyor from PowderHorn Consulting is typically an individual who has been in the field of behavioral health services and wants to see accreditation for any organization that has put effort into the CARF accreditation process. There are certain standards that most surveyors will want to see, and they are listed here for your assistance.

1. **Present the requested material**

*Having* all the policies, procedures and plans and *presenting* all the information are two different things. Typically, a CARF surveyor will arrive in town and check into their hotel and then arrive the next day at the organization's office. When the CARF surveyor arrives in town, he or she will be much more comfortable if the information requested at the beginning of the accreditation process is all there, indexed and preferably on a DVD that the surveyor can immediately plug into a laptop. Using the CARF Standards Format will make it easier for the surveyor to see that your facility is organized and ready for the survey. A CARF consultant from PowderHorn Consulting can assist you in preparing these documents.

If you are missing something in the requested documentation, make that information available up front. If a particular policy is missing, it is best to make the surveyor aware from the beginning so that he or she does not become frustrated asking for it again and again if it does not exist or has not been prepared. If it is not a critical piece of information, the difference in not having it may not make a significant impact. A good beginning will put the organization in a much better position with the surveyor.

2. **Prepare Personnel**

A staff individual who is familiar with the CARF standards will be an effective liaison to the surveyor. When you decide to apply for CARF accreditation, if no one in your

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organization has a good working knowledge of CARF, assign someone from the leadership team to become acquainted with it and the standards so the conversation is easily workable.

3. Invite staff to CARF survey orientation meeting

When you have the date of the CARF survey and have set up the orientation meeting for the surveyor, put up notice that it is planned and invite board members, staff and even clients to attend. While the board will most likely be aware of the process, a phone call, letter or other formal notification is warranted. A notice on the employee bulletin board and another visible at possibly at the entrance to your facility will show the effort that the organization is putting into CARF accreditation. When more people are at this orientation, it shows the CARF surveyor that the clients, staff and board are supportive of the process.

4. Hire a CARF consultant

A CARF consultant is an expert in his or her field and will have the experience to inform an organization of what is expected for CARF accreditation and help them to organize it. When interviewing prospects, be sure to ask questions about his or her experience in the behavioral health / rehabilitation industry - with the more familiarity - the better, experience as a CARF surveyor and how accessible he or she can be to your organization. You should expect all three for a quality CARF consultant.

The CARF process can be intimidating at times, with a multitude of standards to meet. By being organized, preparing and going in with a great attitude, you too can see CARF accreditation for your organization.

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*PowderHorn Consulting is staffed by professionals who have served as providers, executives on treatment organizations and have an extensive history as CARF surveyors and can assist and answer any questions you may have in the CARF accreditation process.*

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About the author:

**TOM SEFCIK, ACSW, MBA**

Tom received his Masters of Social Work degree from the Tulane University in New Orleans LA with an emphasis in clinical services specializing in child/youth/family services. He received his Masters of Business Administration from Indiana University in Bloomington, IN with an emphasis in marketing and information technology. Tom has provided services as a clinician in emergency response, inpatient services, outpatient treatment for child, youth, adult, family and group therapy, and community and business development. He has served in the roles of director of a variety of individual clinical programs as well as clinical director of behavioral healthcare organizations. Most recently, he has served in the role of executive director of several behavioral healthcare organizations that provided services to over 3,500. Most recently he has served as Chief Operating Officer for a nationally recognized benefits management organization providing services to persons with autism spectrum disorders.

In the position of a CARF surveyor, Tom has provided services in both the administrative and program surveyor roles for behavioral health, opioid treatment programs, juvenile justice, and children and youth services in both the United States and Canada.