

Merge Survey

ASPEN lets you merge an historical or other type of survey into a certification kit as needed. A target survey must exist in the certification kit before you can perform the merge. The kit's target survey must be of the same survey category (Health or LSC) and sequence (standard or revisit). The survey you merge will be assigned the event ID of the target survey, and it will be removed from ASPEN upon a successful merger.

Note: You cannot merge Federal Monitoring surveys with other primary survey types: I-Recertification, E-Initial Certification, C-Federal Monitoring, or G-Validation unless the survey extent is J-Federal Jurisdictional.

While **<A> Merge Survey Nursing Home** is in the process of being certified, a complaint is filed for the facility, and a survey for this complaint is created outside of the certification kit. We will create and merge the complaint survey with the survey in the certification kit.

To merge a survey into a certification kit:

1 Locate your nursing home

- Open ACO
- Activate the NH Open selection set.
- Click Find above the Tree view to open the Find window.
- In the Search field, enter all or part of the facility/provider name, **<A> – Merge Survey Nursing Home**, where A is your training letter.
- Select Name for the search Type.
- Click Find Now.
- Double-click the facility name.

This takes you to the facility in Tree view

2 Create standalone survey

- Expand the facility, right-click the Surveys node, and click **New Survey**.
- In the Create Health Survey window, enter **today's date** for the Start and End date fields.

Select the following fields:

- Regulations: **Fed F-14.02 – LONG TERM CARE FACILITY**
- Type of Survey: **A – Complaint Investig**
- Extent(s): **D – Other Survey**

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- In the Team Roster section, click **Update...**, select the SA version of yourself, and click **OK**.
 - Click **OK** to close the survey window.
 - Make a note of the Event ID for the survey, and click **Yes** to open the Citation Manager.

3 Citation Manager

- Double-click **Initial Comments** to move the tag from the Regulations to the Citations field.
- Click **OK**.
- Enter findings in the Citation word processor – **Complaint survey has been created**.
- Click **OK**, then click **Done** to close the Citation Manager.

4 Merge survey into certification kit

- In the Tree view, locate and right-click the **certification kit** into which you will merge the survey. In this case, it is the recertification kit for **<A> - Merge Survey Nursing Home**.
- Select Merge Survey.

The Survey Window appears and lists all surveys for the provider, open or closed, with Event IDs that are not already linked to the certification kit, i.e., the first four characters of the survey Event ID do not match the Tracking ID for the certification kit. Only surveys that are actually part of the certification process should be merged.

- In the Surveys window, click the survey you want to merge and click **OK**.
- Click **Yes** to confirm, and then click **Yes** again in each of the Survey Category Differs windows.

ASPEN copies the survey data into the target survey in the certification kit.

- Click **OK** to refresh the Tree.
- Expand your facility and the certification kit into which you merged the survey.
- Expand the survey linked to the certification kit.

The merged survey is deleted from the Tree view, and the citation information is now included in the survey linked to the certification kit.

- Right-click the Survey, and click **Survey Properties....**

The Type of Survey field now shows both **I-Certification** and **A-Complaint Investig.** selected.

- Click **OK** to close Survey Properties.
- Right-click the Survey, and click **Citation Manager**.
- In the Citations field, double-click the **Initial Comments** tag to see the comments you entered for the merged survey.
- Click **OK** to close the Comments window, and then click **Done** to close the Citation Manager.