You can create a special setup for surveyors if they need electronic access to patient records in Barnestorm Office.

Create an employee code
From Barnestorm Office > Codes > Other Basic Codes > Employees you can create a user like: First name State and Last name Surveyor. Select an unusual employee code.

Create a user name and password
From Barnestorm Office > Codes > Security > Logins create a special user name for the surveyor and a unique password. Select discipline code 0 and data access level 3.

Here is the article link on creating a new user and user ID:
http://kb.barnestorm.biz/KnowledgebaseArticle50110.aspx

Setup Employee Security
Next, you'll modify the surveyor's security access to only allow them to view the Patient Info and Visits/Assessments screen. Below is a link on how to use the Employee Security screen. Use the following setup rules to only allow the Patient Info and Visits screen:
(From the Employee Security feature)
Main Menu = No tabs selected
Codes = All sections should have None selected
Patient Data = All sections should have None selected EXCEPT Visits/Assessments should be View
Time/Charges = All sections should have None selected
Reports and Special Permissions = No selections
Menu Exclusions = Under Office Menu only Home, Patient Info, Patient Histories and Visits/Assessments should NOT be checked, all others should have a checkmark. If the surveyor needs access to Documents, make sure that box is unchecked also.

Here is the article link for setting up the Employee Security:
http://kb.barnestorm.biz/KnowledgebaseArticle50482.aspx