Primary Care Association
Site Visit Training
Health Services and Resources Administration
Bureau of Primary Care
Office of Quality Improvement
Strategic Partnership Division

May 18, 2021

Vision: Healthy Communities, Healthy People
PCA Site Visit Consultant Training

AGENDA

- Site Visit Background
- Site Visit Process Overview
- Site Visit Participant Roles Review
- Site Visit Preparation
- Health Center Interviews
- Site Visit Experience
- Site Visit Reports
Site Visit Background
How BPHC Evaluates Primary Care Associations

• Is the Primary Care Association (PCA) fulfilling all requirements described in the most recent PCA Notice of Funding Opportunity (NOFO)?
• To what extent is the PCA accomplishing its work plan activities?
• What is the PCA’s impact on health centers?
Site Visit Protocol Questions

• Based on NOFO requirements
• Aligned with new NOFOs
• Designed to elicit examples and facilitate dialogue between PCA and consultants
Site Visit Purpose

- Assess Progress
- Determine Adherence to Program Requirements
- Strengthen BPHC—PCA Relationships
- Identify Best Practices
- Share Accomplishments

Strengthen BPHC—PCA Relationships

Determine Adherence to Program Requirements

Identify Best Practices

Share Accomplishments
Site Visit Purpose

The site visit will verify whether and to what extent T/TA activities conducted by the PCA:

• Increase access to comprehensive primary care
• Accelerate value-based care delivery
• Foster a workforce to address current and emerging needs
• Enhance emergency preparedness and response
• Advance health center clinical quality and performance
• Meet supplemental funding requirements
What Does Verification Mean?

• Work plan activities are meeting the requirements, goals, and objectives of the Notice of Funding Opportunity (NOFO)
• PCA is working toward set goals and outcomes
PCAs to be Visited

- 25 PCAs will receive site visits in 2021
- A majority of the 2021 visits will be conducted virtually
- A minimum of one PCA from each HHS region will receive a site visit
- Selected PCAs will receive 6 – 8 weeks’ advanced notice
- All PCAs will receive a site visit during the 2020 – 2023 project period
Site Visit Process Overview
PCA Site Visit Process

Who
- All PCAs will receive a site visit
- 1 or 2 consultants conduct each visit

When
- Once per project period

How Long
- 2-day site visits
Considerations for Virtual Site Visits

Due to the COVID-19 public health emergency, most visits in calendar year 2021 will occur virtually.

- Ensure access to web-based audio and video technology to facilitate remote, face-to-face access to meetings, discussions, and presentations
  - App or video capabilities
  - Internet connectivity and compatibility with virtual platform used
- Prepare participants
  - Provide training or refresher on use of technology
  - Ensure proficiency with functions (e.g., screening sharing, transitioning between presenters)
  - Be aware of potential delays between vocalization by presenter and reception by participants
- Conduct 1–2 practice walk-throughs at least one day before visit
Considerations for Virtual Site Visits (Continued)

• Identify roles
  ▪ Virtual platform host and co-hosts
  ▪ Technical team lead or expert to troubleshoot if problems arise
    ✓ May need to maintain telephone or text communications in event of emergency or need to exchange information off line

• Be prepared
  ▪ Be camera-ready and look at the camera
  ▪ Make sure devices are fully charged and functioning
  ▪ Be present; do not attempt to multitask when camera is engaged
  ▪ Check the background and lighting
  ▪ Secure a quiet space with minimal background noise or other distractions; mute if needed
  ▪ Be flexible
  ▪ Have a backup plan in the event of technology failure
Site Visit Participant Roles
PCA Site Visit Team
BPHC PCA Project Officer Role

• Serves as point-of-contact for programmatic questions about the PCA
• Initiates the Technical Assistance Tracking System (TATS) request for the site visit
• Coordinates kick-off conference call
• Provides required documents to the consultants
• Participates in site visit entrance and exit conferences
  ▪ May participate in other site visit activities
• Reviews and approves the site visit report
Consultant Role

- Responds to the TATs request
- Participates in kick-off conference call
- Reviews documents in the pre-site visit section and completes corresponding questions
- Requests follow up information as needed
- Conducts phone interviews with health centers
- Conducts site visit
- Completes site visit report by deadlines
PCA Role

• Provides required documents to consultants
• Confirms staff availability as required
• Invites the PCA board chair to site visit
• Ensures site visit logistics
  ▪ Virtual: Video conference platform
  ▪ On-site: Arrange meeting space and internet connectivity for consultants
Site Visit Preparation
Pre-Site Visit Purpose

Document and Materials Review

- BPHC and PCA to provide materials

In-Depth Understanding of PCA

- Identify additional questions to ask on site
- Verification support
## Documents Review

<table>
<thead>
<tr>
<th>BPHC Documents</th>
<th>PCA Documents</th>
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<tbody>
<tr>
<td>Most recent competing cooperative agreement application</td>
<td>PCA website (send link and log-information for the members’ only portions of the site)</td>
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<tr>
<td>All work plans from the project period</td>
<td>Most recent organization chart, staffing plan, position descriptions, and staff bios</td>
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<tr>
<td>UDS state performance profile</td>
<td>Clinical/financial performance data</td>
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<tr>
<td>Most recent progress report</td>
<td>Documents to ascertain state needs</td>
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# Documents Review

<table>
<thead>
<tr>
<th>BPHC Documents</th>
<th>PCA Documents</th>
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<tbody>
<tr>
<td>State conditions report</td>
<td>T/TA tools for two T/TA activities</td>
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<td>Collaboration examples</td>
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<tr>
<td>Most recent budget narrative</td>
<td>Strategic plan (if available)</td>
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<td>MOA (if applicable)</td>
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<td>Statement of work and budget for contracts paid with BPHC funding</td>
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Health Center Interview Process

• Purpose: Enhance PCA understanding of health centers’ perspective of the impact of the PCA and the T/TA provided

• Process:
  ▪ Consultants receive a list of health centers to be interviewed from BPHC—do not share with PCA
  ▪ After BPHC PO sends an introductory email, consultant schedules all interviews
Health Center Interviews

- Interviews do not contribute to determining verification
- Interviews should remain anonymous
- Consultant provides aggregated summary of health center interviews during exit conference
- Interview results
  - Enhance PCA’s understanding of how health centers perceive PCA impact, and accessibility, relevance, and usefulness of the T/TA provided
  - May suggest areas of T/TA need
# Kick-Off Call Agenda

<table>
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<tr>
<th>Time</th>
<th>Agenda Item</th>
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<tbody>
<tr>
<td>20 minutes</td>
<td>Introductions</td>
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<td>Participants and roles</td>
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<tr>
<td></td>
<td>Site visit purpose</td>
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<tr>
<td></td>
<td>Overview of site visit process components</td>
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<tr>
<td>20 minutes</td>
<td>Logistics</td>
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<td></td>
<td>• In-person</td>
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<td>• Virtual visit</td>
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<tr>
<td>20 minutes</td>
<td>Staff availability</td>
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<td>Confirm key PCA staff availability</td>
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Site Visit Experience
Virtual and On-site Agenda

• Purpose:
  ▪ Specifies the site visit purpose, process, and participants
  ▪ Sets clear expectations of the site visit
  ▪ Delineates expected timeframes

• Process
  ▪ Consultant sends agenda to PCA for agreement and to PCA PO for approval
  ▪ Agenda includes
    ✓ Entrance conference
    ✓ Topics for discussions during meetings with PCA leadership and staff
    ✓ PCA showcase
    ✓ Exit conference
  ▪ Finalized with input from PO and PCA during kick-off meeting
  ▪ Approved by PO
Site Visit Report
Site Visit Follow-up

• PCA will receive a final site visit report within 45 calendar days of site visit completion
• Report will inform ongoing monitoring between the PO and PCA
Site Visit Report Components

- Verification status
- Interview summaries
- Identified innovations
- TA recommendations for items found “verified” but consultant feels could be improved
Site Visit Report Follow-Up

• The PCA PO will work with the PCA on a Correction Action Plan if areas are found to be not-verified

• The PCA PO will work with the PCA on a Performance Improvement Plan if areas are found to be verified, but have room for improvement
Questions
# BPHC PCA Team Contact Information

<table>
<thead>
<tr>
<th>Name</th>
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Thank You!

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Health Resources and Services Administration (HRSA)

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