

# What to Expect at Your Patient-Centered Primary Care Home Site Visit

## Site Visit Purpose

Oregon Health Authority (OHA) Patient Centered-Primary Care Home (PCPCH) recognition is attestation based. To ensure the fidelity of the program, OHA conducts site visits to a number of recognized PCPCHs each year. By participating in the PCPCH program, practices agree to receive a site visit from OHA. Practices applying for the PCPCH 5 STAR designation are required to have a site visit before the designation is awarded.

The PCPCH program site visit team will observe and learn about your practice operations, interview staff, conduct a patient focus group, and review documents with three goals in mind:

1. **Assessment** of the care delivery and team transformation process in the practice to understand how the intent of the patient-centered model of care is integrated into the services the practice provides to patients.
2. **Collaboration** to identify practice needs, barriers to implementation and areas of improvement needed to help practices successfully implement PCPCH standards. The site visit team helps practices establish improvement plans and connects practices with technical assistance.
3. **Verification** that the practice and patient experience accurately reflects what your practice attested to when it was recognized as a Patient-Centered Primary Care Home (PCPCH).

The PCPCH site visit team is comprised of two PCPCH program staff and a clinical consultant when available. Team members have extensive experience in practice transformation and implementation of primary care home standards.

*The Verification Specialist (VS)* is the primary contact for the practice before the site visit, and assists practices with scheduling and preparing for the site visit. The role of the VS is to review documentation prior to the site visit day to verify that the practice is meeting the standards attested to in its PCPCH application.

The role of the *Improvement Specialist (IS)* is to observe and verify the functionality attested to PCPCH standards during the site visit, and provide technical assistance to the practice. The IS conducts all interviews the day of the site visit. They disseminate tools and strategies for clinical transformation to the PCPCH and serves as a practice coach for up to six months following the site visit.

The *Clinical Transformation Consultant (CTC)* is a provider with extensive experience in practice transformation and the primary care home model. The CTC provides a clinical and quality improvement-based perspective on PCPCH transformation. Having a CTC participate in the verification site visit provides clinicians the opportunity to learn from a peer how to overcome barriers and foster progress in transforming their practices. The CTC is available to assist the practice for up to six months following the site visit.

## Site Visit Process



Prior to the COVID-19 pandemic, all site visits were conducted on-site at the practice. At this time, site visits will be conducted virtually. The PCPCH program has developed a virtual site visit process that aligns as closely as possible to the on-site visit. The PCPCH program is planning to resume on-site visits for some practices in the near future.

Practices are notified by the PCPCH program at least 30 days in advance of the start of their site visit. The PCPCH site visit process takes approximately six weeks from beginning to end. It includes a (1) site visit overview meeting, (2) a documentation submission period, and (3) an official “site visit day” with clinical interviews. Each component is outlined below.

### Site Visit Overview Meeting

- The Site Visit Overview Meeting is an introductory meeting between practice staff and the PCPCH site visit staff.
  - Participating practice staff will introduce themselves with their names, roles, and how long they have been working at the practice.
  - PCPCH site visit team will also introduce themselves and explain their roles, personal and professional backgrounds, and motivations for working in the PCPCH program.
- The PCPCH site visit team will provide a detailed overview of the site visit process including:
  - Document submission
    - Measures list
    - Documentation due date
    - Documentation portal
  - Site Visit Day
    - Agenda completion and submission
    - Staff interviews
    - Patient focus group
- Practice staff should review the “What to Expect at Your Overview Meeting” document prior to the meeting. Practice staff will also have the opportunity to ask the site visit team questions.

### Documentation Submission

As part of the site visit you will submit documentation demonstrating how your practice is meeting each PCPCH measure attested to in your most recent PCPCH application. Documentation is due two weeks after the

overview meeting. Below is a brief overview of the document submission process:

- When you are notified that your practice has been selected for a site visit, the PCPCH site visit team will send you a PCPCH Measure Documentation List which includes all the measures your practice attested to meeting in its most recent application.
- You will gather all the required documentation for each of the PCPCH measures your practice attested to meeting. This information can be found in [2020 PCPCH Recognition Criteria Technical Specifications and Reporting Guide \(TA Guide\)](#) and on the PCPCH Measure Documentation List provided to you by the PCPCH site visit team. Most measures have more than one piece of required documentation. Please ensure no identifiable patient information or protected health information is submitted. All records must be de-identified.
- You will upload all required documents to the PCPCH site visit documentation portal
  - The documentation portal is a collaborative document sharing online platform. You will receive a direct link to the documentation portal from the PCPCH program following the overview meeting.
  - Using this direct link, upload documentation as outlined in the measures list.
  - You may upload a single large document in the format of your choosing (.pdf, .doc, .jpeg etc.), batches of documents for each PCPCH measure, or single documents as long as each file is labeled with the corresponding PCPCH measure.
  - You may also organize files by creating labeled folders and sub-folders within the portal.
  - The goal is for you to use the documentation portal in the way most intuitive for you.
- The PCPCH verification specialist will review documentation and, if required, will contact you with clarifying questions and/or requests for additional documentation two weeks after receipt of documentation. To minimize the chance of having to submit additional documentation (which can be an administrative burden for your practice staff), you should carefully and thoroughly review all the documentation requirements for each PCPCH measure your practice attested to on its most recent application. This information can be found in the [2020 PCPCH Recognition Criteria Technical Specifications and Reporting Guide \(TA Guide\)](#) and on the PCPCH Measure Documentation List provided to you by the PCPCH site visit team.

## Site Visit Day

Prior to the COVID-19 pandemic, all site visits were conducted on-site at the practice. At this time, site visits will be conducted virtually. The site visit day begins with a kick-off session during which the PCPCH site visit team will ask participating members of the practice staff to introduce themselves with their names, roles, and how long they have been working at the practice. The PCPCH site visit team will also briefly re-introduce themselves and explain their roles. Following the introductions, a designated member or members of practice staff will be asked to share the practice's story of transformation and what primary care looks like at this practice "yesterday, today, and tomorrow".

The kick-off meeting will be followed by a series of clinical interviews. During these interviews, the site visitors will ask staff questions related to the specific PCPCH standards that your practice attested to on your most recent PCPCH application. The topics covered during each interview depend on which measures your practice attested to on its most recent application. Site visitors will also facilitate a patient focus group. The site visit day will culminate in a report-out session during which the site visit team will share a summary of strengths,

areas for improvement, and general patient focus group feedback.

**Sample PCPCH Site Visit Agenda**

Meeting Time	Session Description	Practice Team Staff who commonly participate
8:30-9am	Kick-off meeting	clinic leadership, quality improvement staff, leads, supervisors
9:15-10:15am	Interview with provider team 1 and front desk staff	provider, medical assistant, triage or advice staff from practice
10:30 -11:30am	Interview with provider team 2	Different provider & MA from practice
11:45 -12:45pm	Interview with care coordinators, referral or test coordinators, BH providers and pharmacy providers	care managers, referral or test coordinators, behavioral health providers, pharmacist, health navigators, traditional health workers, outreach worker
12:45 - 1:15pm	Lunch Break (additional PCPCH site visit team meeting time, if needed)	N/A
1:15- 2:15pm	Patient Focus Group	Patients only - no practice staff
1:15- 2:15pm	Clinical Transformation Consultant (CTC) meets with practice leadership QI representatives (if applicable)	practice leadership, quality improvement staff, leads, supervisors
2:15 - 3:00pm	PCPCH site visit team reviews findings	N/A
3:00 - 3:30pm	Report out of site visit findings	practice leadership, quality improvement staff, leads, supervisors

## After Your Site Visit

### PCPCH Site Visit Report

- Following your site visit, the PCPCH site visit team will send you a written report with specific findings including whether your practice meets each of the PCPCH measures attested to on your application, and if your practice's overall PCPCH tier level was verified.
- If applicable, the report will also include a section from the Clinical Transformation Consultant providing their assessment and recommendations for each of the six PCPCH Core Attributes. The PCPCH site visit team will send the report to the practice within 30 days of the site visit day.

### PCPCH Improvement Plan

- If the PCPCH site visit team cannot verify application information, the practice will have the opportunity to develop a performance improvement plan within 90 days of receiving the written report and implement that plan within six months of receiving the written report. Improvement Plans are required for practices with any missed measures that are must-pass standards.
- If a practice fails to submit the improvement plan or we are unable to verify that the standards they attested to are being met, OHA will amend the practice's recognition to reflect the appropriate verified points and tier level or revoke its status as a primary care home if appropriate.

### Post-Site Visit Survey

You will receive an invitation to provide feedback on the complete site visit process via the post-visit survey. Please share this survey with all practice staff who participated in the site visit. The PCPCH program is continually working to improve our internal site visit processes and appreciates all practice staff feedback.

## Site Visit Preparation Checklist

### Prior to the Overview Meeting

- Confirm Overview Meeting date with PCPCH site visit staff via email
- Review the following documents:
  - ✓ What to Expect at Your Overview Meeting
  - ✓ PCPCH Measures Documentation List
  - ✓ PCPCH TA Guide

### Two Weeks After the Overview Meeting

- Prepare and submit **de-identified** documentation to the documentation portal
- Complete the site visit agenda document and return it to the PCPCH site visit team

### Prior to the Site Visit Day

- Recruit six to eight patients to be part of a focus group during the site visit. See the document FAQs for Patient Focus Groups for more information
- Designate staff/leadership responsible to present your practice's "PCPCH Clinic Story" during the opening

meeting

- Ensure that staff members being interviewed are familiar with the PCPCH standards that impact their role, and understand how they are implemented within the practice
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## Technical Assistance Resources

### The purpose of HIPAA and what is considered Protected Health Information (PHI)

- <https://www.hipaajournal.com/purpose-of-hipaa/>
- <https://www.hipaajournal.com/what-is-considered-protected-health-information-under-hipaa/>

### 2020 PCPCH Recognition Criteria Technical Specifications and Reporting Guide (TA Guide)

- <https://www.oregon.gov/oha/HPA/dsi-pcpch/Documents/2020-PCPCH-TA-Guide.pdf>

### PCPCH program website for technical assistance and resources

- “Extra guidance” one-page documents for select PCPCH Standards and Measures
  - Recorded webinars and learning collaboratives for select PCPCH Standards and Measures
  - Resources to assist your practice with health equity initiatives
  - <https://www.oregon.gov/oha/HPA/dsi-pcpch/Pages/Resources-Technical-Assistance.aspx>
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*We look forward to seeing first-hand how your practice is working to achieve better health and better care as a recognized Patient-Centered Primary Care Home!*

Questions? Please contact the PCPCH program at [PCPCH@dhs.oha.state.or.us](mailto:PCPCH@dhs.oha.state.or.us)