

PREPARING FOR YOUR PATIENT-CENTERED PRIMARY CARE HOME SITE VISIT

PURPOSE

Site visitors from the Oregon Health Authority's Patient Centered-Primary Care Home (PCPCH) Program and a community-based clinical transformation consultant will observe and learn about your clinic 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 clinic to understand how the intent of the patient-centered model of care is integrated into the services the primary care home provides.
2. **Collaboration** to identify clinic 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 through resources including the Patient-Centered Primary Care Institute.
3. **Verification** that the clinic practice and patient experience accurately reflects what your clinic attested to when it was recognized as a PCPCH.

SITE VISIT PLANNING CALL

We would like to have a brief 30-minute call with the person at your clinic who will be responsible for coordinating the site visit, ideally within seven days of receiving email notification of your site visit.

The goals of the call are to:

- confirm the site visit date
- explain some key information about the site visit
- discuss and develop the agenda, and discuss logistics
- discuss the staff interviews and patient focus group
- discuss the required supporting documentation
- answer any questions

What to anticipate for the KICK-OFF SESSION

During the kick-off session, we will ask participating members of the clinic staff to introduce themselves with their names, roles, and how long they have been working at the clinic. The site visit team will also introduce ourselves and explain our roles, personal and professional backgrounds, and motivations for working in the PCPCH program. Following the introductions, a designated member or members of clinic staff will be asked to share the clinic's story of transformation and what primary care looks like at this practice "yesterday, today, and tomorrow".

What to anticipate for the STAFF INTERVIEWS

During the interviews, the site visitors will ask staff questions related to the specific PCPCH standards that your clinic attested to on your most recent PCPCH application. The topics covered during each interview depend on which criteria your clinic attested to. Please ensure that staff review your clinic's PCPCH application, and understand how their work is related to the standards attested to. Please refer to the [PCPCH Technical Assistance Guidelines](#) (TA Guide) for detailed information.

EXAMPLES OF AREAS COVERED DURING STAFF INTERVIEWS

Clinical Teams

- Preventive care (3.A – Preventive Services)
- Medical, mental health, substance abuse and developmental services (3.B and 3.C)
- Risk or developmental promotion behaviors (3.D – Comprehensive Health Assessment & Intervention)
- Care for complex patients (5.C – Care Coordination)
- Hospital/skilled nursing care (5.E – Referral and Specialty Care Coordination)
- Hospice and palliative care (5.F – End of Life Planning)
- Health promotion and prevention (6.B – Education and Self-Management Support)

Care Managers, Referral or Test Coordinators, Behavioral Health Providers

- Patient data and proactive patient management (5.A – Population Data Management)
- Care of complex patients (5.C/5.F – Care Coordination/Comprehensive Care Planning)
- Test tracking and notification (5.D – Test and Results Tracking)
- Referral tracking and community referrals (5.E – Referral and Specialty Care Coordination)
- Screening, mental health, substance abuse, and developmental services and coordination (3.C – Mental Health, Substance Abuse & Developmental Services)

Front Office and Triage/Advice Staff

- Appointment scheduling (1.B – After Hours Access)
- Clinical advice (1.C – Telephone and Electronic Access)
- Clinician/team patient assignments and visits (4.A/4.B – Personal Clinician Assigned and Continuity)
- Health records (4.C – Organization of Clinical Records)
- Interpretive services (6.A – Language/Cultural Interpretation)

During the medical records review, several records will be randomly selected for review to verify the PCPCH standards that your clinic attested to. During this review, the staff member will be asked to provide specific examples that substantiate the applicable standards.

CLINICAL TRANSFORMATION CONSULTANT INTERVIEWS

To enhance the **assessment** and **collaboration** aspects of your PCPCH site visit and to provide added value to foster further transformation at your clinic, the PCPCH Program is including a community-based “clinical transformation consultant” role at the site visits. This consultant, a clinician with extensive experience working within an Oregon PCPCH, will be present during the entire site visit and will provide a written summary of findings and recommendations along with the full PCPCH site visit report.

During the morning interviews the consultant will observe the interviews with PCPCH site visitors and clinic staff, and will ask questions focused on the capabilities, integration, quality improvement (QI) culture, and sustainability of the PCPCH model within the clinic. In the afternoon the consultant will meet separately with clinic leadership and/or representatives of the clinic/organization QI team to discuss initial findings, assess barriers, and help the clinic identify areas and strategies for improvement. **This will be an invaluable part of the site visit day, so please carefully consider which individuals at your clinic would be most important to attend this meeting.** Please ensure their time is protected so your clinic can receive the most benefit from this part of the site visit day.

After your site visit the clinical consultant, along with the practice coach, will serve as your transformation consultant resource team. This resource team will be available for three follow-up phone conversations during the six months following your site visit. The resource team will help your clinic overcome barriers, implement improvement strategies, and meet established goals. This mentorship role and follow-up will be discussed in more detail by your consultant at the beginning of the site visit day.

What to expect during the PATIENT FOCUS GROUP

During the 45-minute focus group, patients will be asked about their experience of care related to access, continuity, whole-person care, communication, and coordination, similar to those questions asked on the [CAHPS survey](#). We can provide guidance on how to recruit for the focus group. Ideally, we’d like to speak with 4-6 patients during this 45-minute group session.

RECOMMENDED PCPCH SITE VISIT AGENDA

This is the sequence of events for a typical site visit day. The site visit agenda can be adjusted if necessary. **Please note that most activities occur simultaneously, so we will need separate meeting space.**

Meeting Time	Meeting Category	Description	Site Visit Staff	Clinic Staff & their Roles in the Clinic	Location/ Room
8:15-8:55 a.m.	Kick-off	Welcome, introductions, clinic story	ALL		
9:00-9:10 a.m.	Clinic Tour	Tour physical space	ALL		
9:15-10:00 a.m.	Clinical Team 1	Interviews with provider team 1	PES/CTC		
	Front Office	Interviews with front office/triage staff	CS3		
10:00-10:50 a.m.	Clinical Team 2	Interviews with provider team 2	PES/CTC		
	Documentation/Chart Review	Review documentation binder provided by clinic and charts for measure verification	CS3		
11:00-11:15 a.m.	BREAK 1	True break	ALL individual		
11:15 a.m.-12:00 p.m.	Care Coordination/Behavioral Health	Interviews with care coordinators/managers, referral/test coordinators, behavioral health providers	PES/CTC		
	Documentation/Chart Review	Review documentation binder provided by clinic and charts for measure verification	CS3		
12:00-12:15 p.m.	BREAK 2	Site visit team convenes to discuss any topics or measures that require follow-up	ALL together		
12:15-1:00 p.m.	Patient Interviews	PES, 6-8 patients	PES		
	Final Documentation Collection	Follow-up on any loose ends identified by site visit team and discussed during BREAK 2	CS3		
	Clinical Transformation Consultant (if applicable)	CTC meets with clinic leadership, representatives of the QI team, etc. (if applicable)	CTC		
1:00-2:30 p.m.	Lunch Break and Report Prep	Review findings, compare notes, prepare message and points of communication for report out	ALL together		
2:30-3:00 p.m.	Report Out	5 STAR determination (if applicable), summary of strengths and areas for improvement, general focus group feedback	ALL		

SITE VISIT PREPARATION CHECKLIST

At least 14 days before your site visit:

- Prepare **de-identified** documentation for the PCPCH standards and measures you attested to
- Email **de-identified pre-visit documentation**. You might need to zip the file or send in batches due to size.
- Prepare **de-identified day-of-visit documentation** and place in a binder. The site visit team will take this binder with them at the end of the site visit.
- Complete the pre-site visit survey: <https://www.surveymonkey.com/r/PCPCHPre-VisitSurvey2018>
- Complete the site visit agenda and return to the PCPCH site visit team
- Reserve rooms for the site visit team to use throughout the day, including the opening and closing meetings, and patient focus group
- Contact 6 to 8 patients to be part of a focus group during the site visit. See [FAQs for Patient Focus Groups](#) for more information

At least 7 days before your site visit:

- Designate staff/leadership responsible to present your clinic's "PCPCH story" during the opening meeting (approximately 10 minutes)
- Ensure that staff members being interviewed are familiar with the PCPCH standards that impact their role, and understand how they are implemented within the clinic

SUPPORTING DOCUMENTATION

Your clinic must prepare documentation that demonstrates how your clinic meets each PCPCH standard your clinic attested to on your most recent PCPCH recognition application. **Documentation related to some standards is required to be submitted at least three weeks prior to your site visit date; other documentation should be prepared and available on the day of your site visit.**

Examples of documentation that can be used to support the measures your clinic has attested to: De-identified screenshots from required fields in medical records; quantitative data from quality improvement or quality assurance tools; copies of dashboards or templates; copies of a blank patient satisfaction survey; project improvement plans; description of workflow processes; guidelines; written agreements; information from the clinic's website; brochures and educational materials.

For more information, please refer to the [PCPCH TA Guidelines](#).

- **DOCUMENTATION REQUIRED 14 DAYS PRIOR TO SITE VISIT DAY**
Please submit documentation related to each standard, only if your clinic attested to them. Please submit documentation **at least 14 days prior to the site visit via email in .pdf format**.
 - **Please ensure no identifiable patient information or protected health information is submitted. All records must be de-identified.**
- **DAY OF SITE VISIT DOCUMENTATION**
Please provide documentation (in a binder) on the day of the site visit related to each standard that your clinic attested to. For more information about specific documentation, please refer to the [PCPCH TA Guide](#).
 - **Please ensure no identifiable patient information or protected health information is submitted. All records must be de-identified.**

WHAT TO EXPECT AFTER YOUR SITE VISIT

Following your site visit, you will receive a written report with specific findings including whether your clinic meets each of the PCPCH standards attested to on your application, and if your clinic's overall tier level was verified. 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. Our goal is to send the report to your clinic within one month of your site visit.

If any standards are not verified at the site visit, clinics will have a reasonable opportunity to submit additional facts or other information in response to those findings. If we cannot verify application information, the clinic will have the opportunity to develop and implement a performance improvement plan within 90 days of receiving the written report. If a clinic fails to submit the improvement plan or we are unable to verify that the standards they attested to are being met, OHA may amend the clinic's recognition to reflect the appropriate verified points and tier level, or revoke its status as a primary care home if indicated.

ADDITIONAL RESOURCES

- Online training modules for the 2017 standards: <http://www.pcpcci.org/online-modules-2017-pcpch-standards>
- Recorded webinar (10/8/2014) “What to Expect When You Are Expecting a PCPCH Site Visit”: <http://www.pcpcci.org/resources/webinars/pcpch-site-visits-what-expect>

We look forward to seeing first-hand how your clinic is working to achieve better health and better care as a recognized Patient-Centered Primary Care Home!

Questions?

Please contact the PCPCH Program Team at PCPCH@state.or.us