



# 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

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- 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

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- Based on NOFO requirements
- Aligned with new NOFOs
- Designed to elicit examples and facilitate dialogue between PCA and consultants



# Site Visit Purpose



# Site Visit Purpose

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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?

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- 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

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- 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)

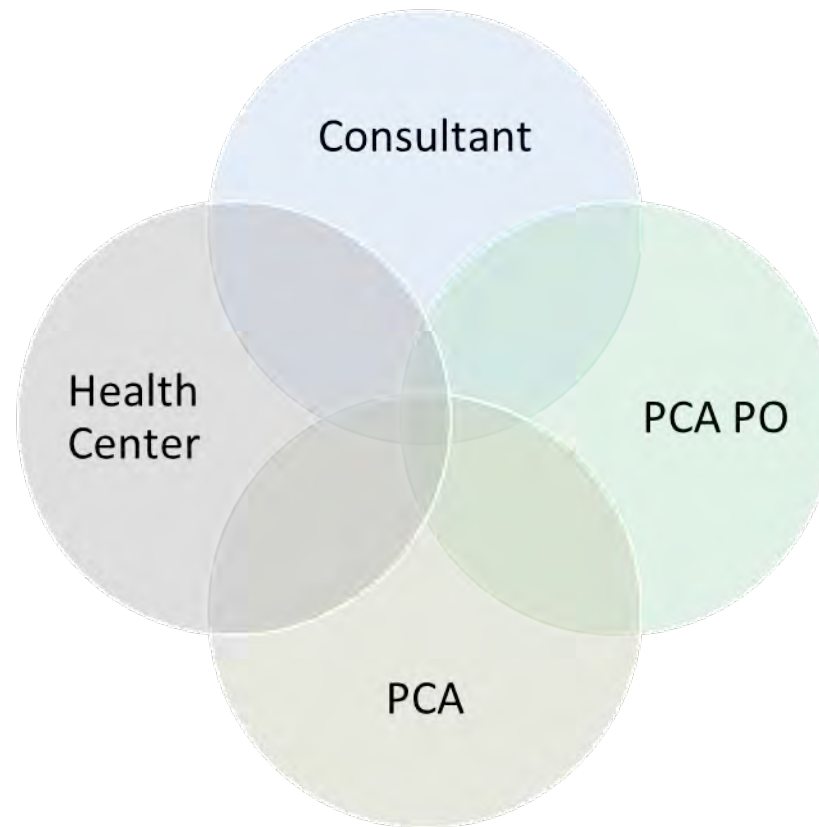
- Identify roles
  - Virtual platform host and co-hosts
  - Technical team lead or expert to troubleshoot if problems arise
    - ✓ May need to maintain telephone or text communications in event of emergency or need to exchange information off line
- Be prepared
  - Be camera-ready and look at the camera
  - 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

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- 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

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- 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

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- 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

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

# Documents Review

| BPHC Documents               | PCA Documents   |
|------------------------------|---|
| State conditions report      | T/TA tools for two T/TA activities<br>Collaboration examples      |
| Most recent budget narrative | Strategic plan (if available)<br>MOA (if applicable)              |
|                              | Statement of work and budget for contracts paid with BPHC funding |



# Health Center Interview Process

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- 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

| Time       | Agenda Item  |
|------------|--|
| 20 minutes | Introductions<br>Participants and roles<br>Site visit purpose<br>Overview of site visit process components |
| 20 minutes | Logistics <ul style="list-style-type: none"><li>• In-person</li><li>• Virtual visit</li></ul>              |
| 20 minutes | Staff availability<br>Confirm key PCA staff availability   |

# 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

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- 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

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

# Site Visit Report Follow-Up

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- 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

| Name                     | Email  |
|--------------------------|--|
| Nathalia Drew, Team Lead | <a href="mailto:NDrew1@hrsa.gov">NDrew1@hrsa.gov</a>             |
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# Thank You!

Bureau of Primary Health Care (BPHC)

Health Resources and Services Administration (HRSA)

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