Monitoring Site Visit Process Overview and Updates

Health Center Controlled Networks (HCCN) Training

February 28, 2023

Health Resources and Services Administration (HRSA)
Bureau of Primary Health Care (BPHC)
Strategic Partnerships Division (SPD)

Vision: Healthy Communities, Healthy People

Agenda

- HCCN Program Overview
- Monitoring Site Visit (SV) Process Overview
- Site Visit Participant Roles Review
- Site Visit Preparation
- Pre-Site Visit Document Review
- 2023 Monitoring Site Visit (SV)
- Site Visit Report
- Resources
- Contacts
- Questions and Answers

Health Center Controlled Networks (HCCN) Program Overview

HCCN Program Overview

The purpose of the Health Center Controlled Networks (HCCN) grant program is to support health centers to leverage health IT and data to deliver high-quality, culturally competent, equitable, and comprehensive primary care, with a specific focus on improvements:

- Clinical quality;
- Patient-centered care; and
- Provider and staff well-being.

Notice of Funding Opportunity: https://bphc.hrsa.gov/program-opportunities/hccn

HCCN Program Overview –
Awards and Program Description

Total HCCN awards:

- Base Award: $42,000,000

- Supplemental Award: $2,000,000

Number of awards: 49 HCCNs

Description of HCCN Awardees:

- 28 HCCNs are also Primary Care Associations (PCAs)

- HCCNs support 1258 participating health centers (PHCs) in all 50 US states, D.C., and several US territories and Freely Associated States[1]

- 76% of HRSA funded Health Centers (including Look-Alikes) participate in the HCCN Program[1]

[1] **Based on real-time data captured in Participating Health Center module in EHBs on January 19, 2023**

HCCN Program Overview –
Goals and Objectives (1 of 3)

Objective	Objective Description
Objective 1: Patient Engagement	Increase the percentage of PHCs that support patients and families' expanded use of integrated virtual care (e.g., electronic messages sent through patient portals to providers, telehealth visit, remote monitoring devices).
Objective 2: Patient Privacy and Cybersecurity	Increase the percentage of PHCs with formally defined health information and technology policies and practices that advance security to protect individual privacy and organizational access.
Objective 3: Social Risk Factor Intervention	Increase the percentage of PHCs with that use patient-level data on social risk factors to support patient care plans for coordinated, effective interventions.

Goals and Objectives (2 of 3)

Objective	Objective Description
Objective 4: Disaggregated Patient-level data	Increase the percentage of PHCs with systems and staff aligned with submitting disaggregated, patient-level data via UDS+.
Objective 5: Interoperable Data Exchange and Integration	Increase the percentage of PHCs with the capacity to integrate clinical data with data from clinical and non-clinical sources across health care continuum, care coordinators, to optimize care coordination and workflows.
Objective 6: Data Utilization	Increase the percentage of PHCs that data strategies, including use of predictive analytics and data visualization to support population health interventions.

HCCN Program Overview –
Goals and Objectives (3 of 3)

Objective	Objective Description
Objective 7: Leveraging Digital Health Tools	Increase the percentage of PHCs that support providers and staff in achieving and maintaining proficiency in the use of digital health tools.
Objective 8: Provider and Staff Well-Being	Increase the percentage of PHCs that improve health IT usability and adoption by providers and staff.
Objective 9: Health Equity	Develop one objective and associated outcome measure that will focus on utilizing a health IT innovation to reduce health disparities and/or address social determinants of health based on the unique needs of the PHCs in their network.
Objective 10: Improve Digital Health Tools	Develop one objective and associated outcome measure that will focus on improving the functionality of digital health tools in one or more of five designated areas.

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HCCN Program Overview –
Supplemental Funding

- In FY 2022, an additional one-time funding amount of $40,817 was awarded to each HCCN to further support health centers with leveraging HIT and data to delivery high-quality culturally competent, equitable, and comprehensive primary care.

- The support should specifically focus on:
  - improvements in clinical quality,
  - patient-centered care,
  - and provider and staff well-being

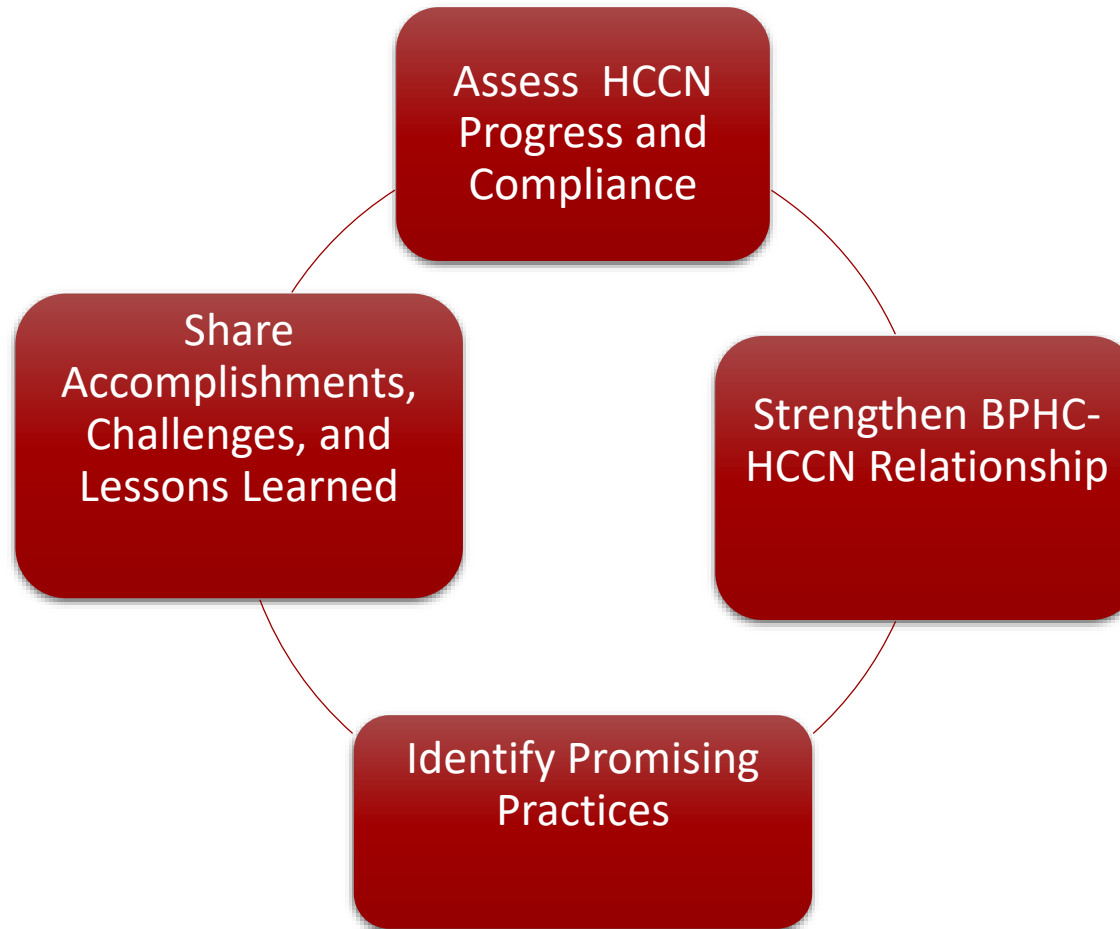- Funds must support the approved scope of work and budget submitted to HRSA.

Monitoring Site Visit (SV) Process Overview

HCCN Monitoring SV –
Purpose

- Assess HCCN Progress and Compliance
- Strengthen BPHC-HCCN Relationship
- Identify Promising Practices
- Share Accomplishments, Challenges, and Lessons Learned

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Monitoring HCCN SV –

Process

Who	• All HCCNs will receive a site visit • One consultant to conduct each visit
When	• Once over the three-year project period
How Long	• Two days (virtual or in-person)

Monitoring SV Expectations

We expect site visits to result in the following:

- Review current status of HCCN's progress on work plan activities and confirm its compliance with the program requirements

- Knowledge about key challenges and barriers

- Identification of next steps to ensure attainment of program goals and objectives

- Knowledge about accomplishments and/or successes

- Insight from PHCs on the impact of the HCCN program

- Insight from HCCN Board on HCCN governance

- Identification of innovations and promising practices

2023 Monitoring SV
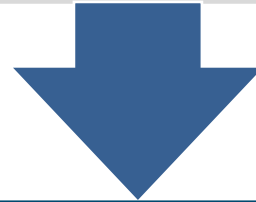
HCCN Monitoring SV Team –

Roles
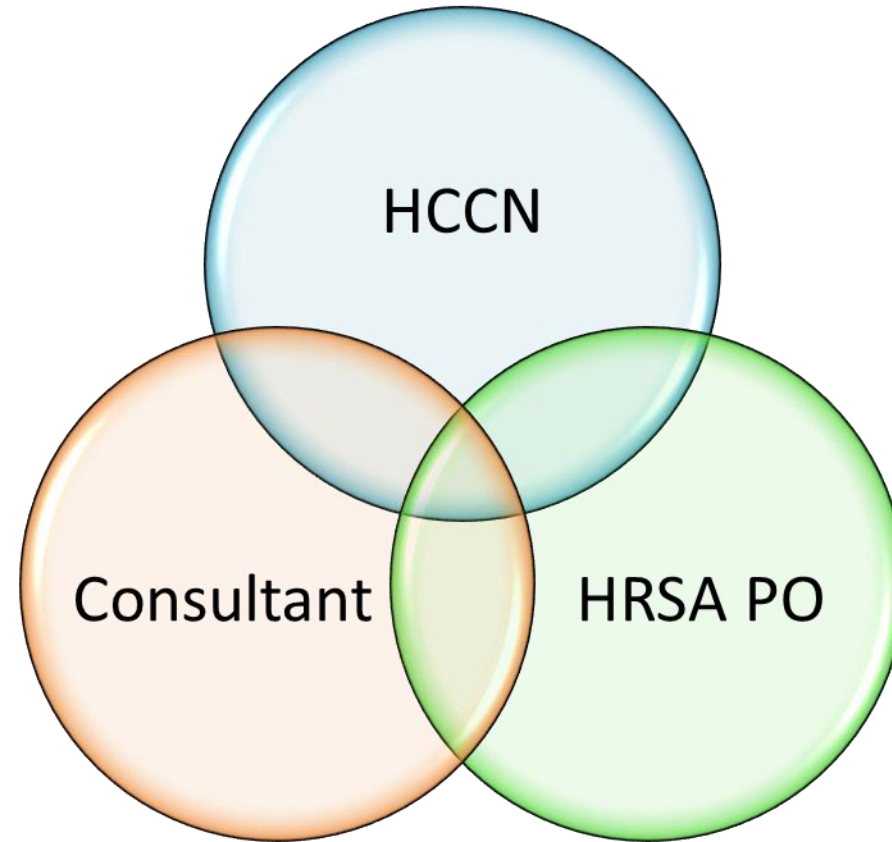
Pre-Site Visit Opportunities
Purpose

Consultants' Document and Materials Review

BPHC and HCCN to provide materials

Consultants' In-Depth Understanding of HCCN

Lead on-site discussions on HCCN project status and progress	Identify additional questions to ask on-site

Pre-Site Visit Opportunities
Roles and Responsibilities

- **PO's Role:**
  - PO coordinates Site Visit Planning Call with consultant
  - PO coordinates Site Visit Kick-Off Call with HCCN and consultant
  - Provide the Consultant with Pre-Site Visit Documents to Review

- **Consultant's Role:**
  - Participate in Pre-Site Visit Calls
  - Create Site Visit Kick off Call Agenda
  - Complete Pre-Site Visit Analysis

- **HCCN's Role:**
  - Coordinate site visit activities (e.g., PHCs visits, board meetings, etc.)
  - Participate in Pre-Site Visit Calls
  - Provide required pre-site visit review documents as well as additional documents upon consultant request (e.g., 3 last board meeting notes, updated budget)
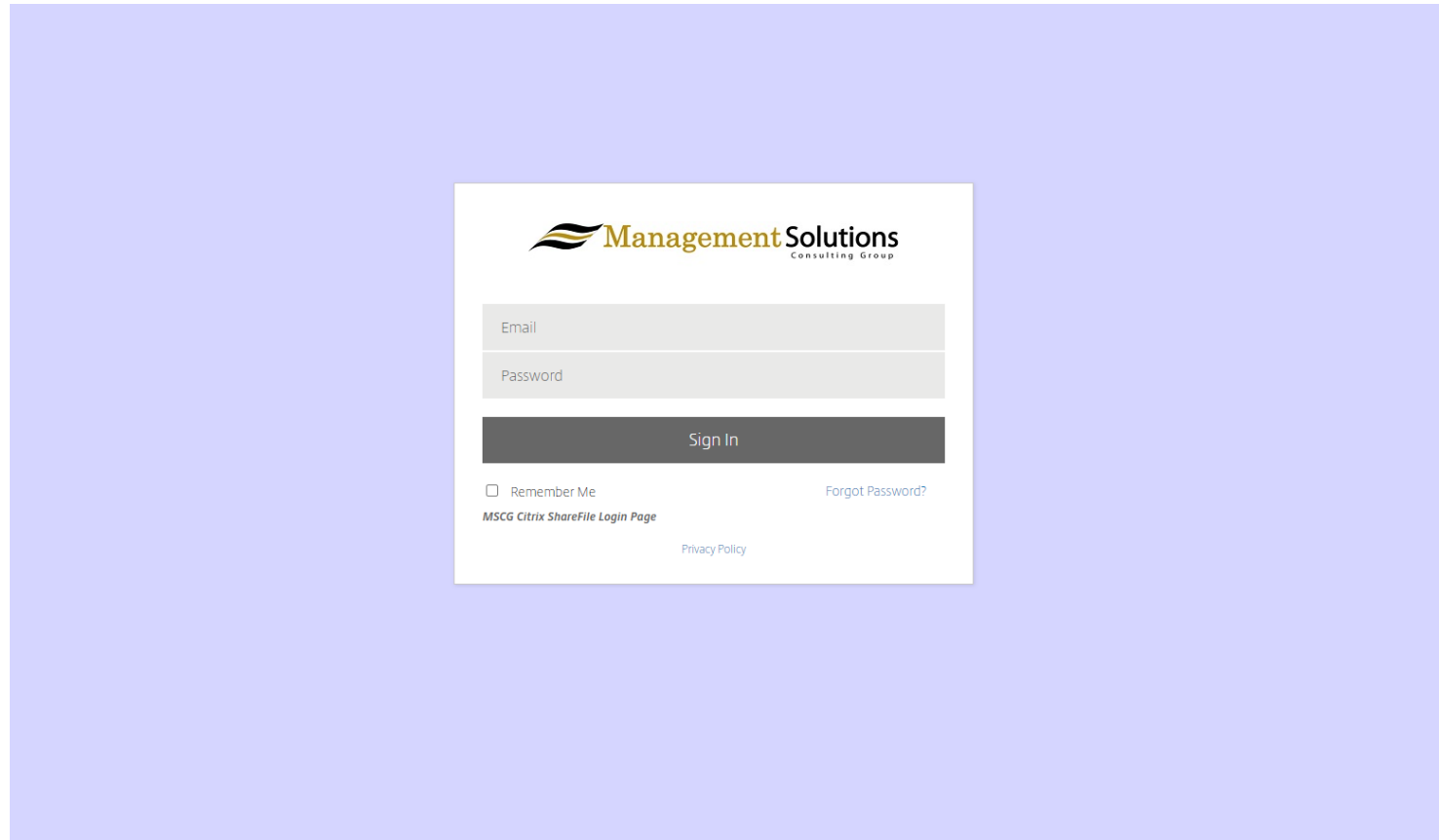
Pre-Site Visit Opportunities

Documents to Review

BPHC Documents	HCCN Documents
1. FY2022 HCCN Notice of Funding Opportunity 2. FY2022 grant application 3. All documents from most recent Non-Competing Continuation Progress Report 4. Distinction document (PCA/HCCN dual awardees only) 5. Other documents requested by consultant during kick-off call	1. Individualized work plans (IWPs) (minimum of five PHCs) and must include IWPs of PHCs we are visiting 2. HCCN board meeting minutes from the last two HCCN board meetings 3. Presentation that outlines impact of HCCN collaboration with PHC, which should include organizational and historical info about the PHC 4. Other documents requested by consultant during kick-off call

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External Documentation Upload System

MSCG Citrix ShareFile

Pre-Site Visit Opportunities
Consultant Coordination Call

Time	Sample Agenda Items
20 minutes	<u>Introductions</u> • Site visit purpose • Overview of site visit process components • Participants, including roles and responsibilities • Confirm the documents to be provided by the HCCN , PO and the due dates • Discuss the draft agenda
20 minutes	<u>Logistics</u> **(In-Person Visit)** • Site visit and meeting dates, spaces, and times • Confirm onsite and remote participants • Confirm which PHCs will be visited and when • Review the onsite agenda draft and deadline for HCCN feedback
20 minutes	<u>Staff Availability</u> • Confirm the key HCCN management staff who will be available • Review the list of staff who will be interviewed during the visit

Pre-Site Visit Opportunities

Sample Agenda Day 1

Time	Site Visit Day 1
8:00 a.m. – 9:00 a.m.	Entrance Conference
9:00 a.m. – 11:00 a.m.	HCCN Project Status Updates Part 1
11:00 a.m. – 12:00 p.m.	Meet with HCCN Board Members
12:00 p.m. – 1:00 p.m.	Break for Lunch
1:00 p.m. – 3:00 p.m.	HCCN Project Status Updates Part 2
3:00 p.m. – 4:30 p.m.	Demonstrations and Other Site Visit Activities
4:30 p.m. – 5:00 p.m.	Wrap Up

Pre-Site Visit Opportunities
Sample Agenda Day 2

Time	Site Visit Day 2
9:00 a.m. – 11:00 a.m.	HCCN Project Status Updates Part 3
11:30 a.m. – 12:00 p.m.	Visit for first PHC, to include relevant demonstrations of HIT tools, resources, services and solutions provided to PHC
12:00 p.m. – 1:00 p.m.	Break for lunch
1:00 p.m. – 3:00 p.m.	Supplemental Funding Status Updates and PHCs visits
3:00 p.m.-3:30p.m.	Visit for second PHC, to include relevant demonstrations of HIT tools, resources, services and solutions provided to PHC
3:30 p.m.-4:00p.m.	Preparation for Exit Conference
4:00 p.m. – 4:30 p.m.	Exit Conference

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Monitoring SV Review

Entrance Conference
Purpose and Participants

Purpose:

- Meet HCCN's key management staff

- Reiterate site visit purpose and goals

- Review and confirm schedule

- Allow the HCCN to provide an overview/showcase of HCCN and detailed grant progress

Participants include the HCCN's key management staff, consultant, HCCN PO (all participants are remote)

- *Consultant facilitates entrance conference.

Monitoring SV Activities

Consultant and HCCN staff participate in activities that support on-site analysis which include the following:

- HCCN project status update
- Meeting with HCCN Board members
- Visits to PHCs including informal discussion with health center staff
- Demonstrations of health IT (HIT) tools, resources, services, and solutions provided to PHCs

Consultant leads discussions on project status for each program goal and its objectives. HCCN should be prepared to discuss the following:

- Detailed status on each program goal and objective to date
- Successes and accomplishments
- Challenges, barriers, and lessons learned
- Innovations and/or promising practices

Monitoring SV Activities
Required Consultant Questions during Site Visit

Questions that the consultants must answer during the monitoring site visit
Question 1. Does project work plan adequately support HCCN program goals and objectives?
Question 2. Does project work plan demonstrate clear linkages to identified PHCs' HIT needs and predicted barriers?
Question 3. Are goal targets in project work plan realistic and achievable considering proposed activities, resources, collaborations, and anticipated challenges?
Question 4. Do PHCs' Individualized Work Plans identify PHC's needs and appropriate activities to be completed to address those needs? – If no, ask HCCN to demonstrate how they are monitoring and tracking PHC progress and needs.
Question 5. Does staffing plan adequately support implementation of activities and achievement of goal targets in project work plan?
Question 6. Is partnership and/or collaboration with PCA(s) and HITEQ evident?
Question 7. Is it evident that HCCN has an appropriate governance structure, ensuring that it is independent from the boards of its health center members? Is governing board's role in monitoring the program clearly delineated? Is the HCCN governing board structure as stated in the approved application?
Question 8. Is the budget and scope of contracts and/or agreements reasonable in relation to the HCCN's planned activities for the budget period?
Question 9. Are there any aspects of the virtual visit that need to be revisited later due to technology challenges or not-being in-person?

Exit Conference
Purpose and Participants

Purpose:

- Provide a summary of all Site Visit findings.

- Participants include HCCN leadership and staff, HCCN Board representative(s), and PO to present site visit findings.

  - *Consultant facilitates exit conference.

Monitoring SV Report

Site Visit Report (1 of 2)

Site visit reports are expected to provide BPHC with an accurate, objective depiction of the HCCN's project status. Final site visit reports will be shared with the HCCN after the report is approved by BPHC. The site visit report review process will be completed within 45 calendar days from when the site visit was completed.

- Consultant uses site visit report template – Appendix F in the site visit guide
- All information in the site visit report is based on fact
- Site visit report addresses the HCCN's status on all HCCN program goals and objectives

Site Visit Report (2 of 2)

- The site visit report is submitted and reviewed by the consultant's contracting organization within 20 days of the completion of the site visit

- The PO reviews the report, makes edits or requests changes within 25 days

- When complete and accurate the PO recommends approval

- The Program Quality Controller (PQC) reviews and is the final approval source

- The PO shares the final site-visit report with the HCCN

Additional Contact Information and Resources

BPHC Contact Information

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SV Resources

HCCN Resources

- HCCN TA webpage: https://bphc.hrsa.gov/program-opportunities/funding-opportunities/hccn

- 2020-2025 Federal Health IT Strategic Plan: https://www.healthit.gov/topic/2020-2025-federal-health-it-strategic-plan

- ONC Interoperability Proving Ground: https://www.healthit.gov/techlab/ipg/

- Promoting Interoperability Programs: https://www.cms.gov/Regulations-and-Guidance/Legislation/EHRIncentivePrograms

- Strategic Partnerships Division Resources: https://bphc.hrsa.gov/qualityimprovement/strategicpartnerships/index.html

- HRSA Strategic Plan (FY 2023) Interim: https://www.hrsa.gov/about/strategic-plan/index.html

- HHS Strategic Plan FY 2022 – 2026: https://www.hhs.gov/about/strategic-plan/index.html

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Health Center Program Resources

- BPHC website: https://bphc.hrsa.gov/
  - Includes many technical assistance resources

- Weekly e-newsletter: *Primary Health Care Digest*
  - Sign up online to receive up-to-date information

- Health Center Program Support: https://bphccommunications.secure.force.com/ContactBPHC/BPHC_Contact_Form
  - HRSA Electronic Handbooks (EHBs) questions/issues
  - FTCA inquiries

- BPHC Project Officer:
  - To address specific questions about your health center's grant or look-alike designation

- HCCNs, NTTAPs, and PCAs: https://bphc.hrsa.gov/qualityimprovement/strategicpartnerships/

Questions and Answers

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