### Site Visitor Insights – What is Important to See to Make Sure the Pieces make a Complete PHAB Picture

15<sup>th</sup> Annual Iowa Public Health Practice Colloquium October 7, 2014 Mary L. Kushion, MSA



### What you should expect to see

- Thorough and rigorous review
- · Comments in areas where you excel
- Recommendations where improvements should be considered
- General overall impressions of your agency



Setting the tone for the visit starts prior to the visit



#### Insight #1: READ -READ-READ

- Take the time to carefully read the Standards and Measures.
- · Review what PHAB is requesting
  - Is it asking for you to describe WHAT was done? HOW it was done? Or WHO was involved in getting it done?
  - How many examples and what is the time frame?

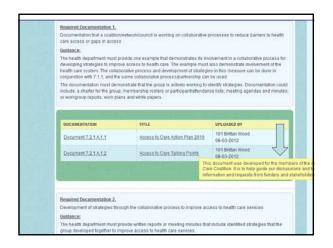


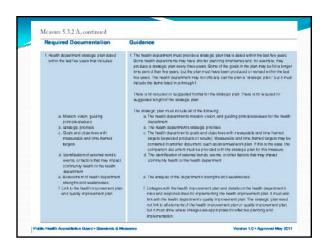
# Insight #2: More is not always better

- For many measures, an excerpt is acceptable; reviewers can always ask to see more
- Avoid tossing in extra examples give us your best. To provide more is excessive and confusing; bogs down the review process
- Free-standing documents preferred to buried in reports
- Want to avoid "Scroll-down fatigue" by reviewers
- Submitting links are good make sure they are active

# Insight #3: Use the Document Description Feature

- •Site Visitors really do read these!
- Use to "point" to where in the document the evidence is located
- Give details on which element of the measure the documentation serves as evidence





### As an example...

"See page 4 for evidence required for: (a) mission, vision and guiding principles. See page 10 for evidence required for (b) strategic priorities. See pages 12-19 for evidence required for (c) for time-framed targets. See page 27 for evidence required for (d) for external trends. See page 8 for evidence required for (e) for dept.'s strengths and weaknesses. See page 22 for evidence required for (f) linkages with the CHIP."

ise Desc	criptive Title	S
DOCUMENTATION	TITLE	UPLOADED BY
Document 2.1.1 A.1.1	Example 1: Public Health Surveillance and Epidemiological Investigations Plan	07-10-2013
Document 2.1.1 A.1.2	Example 2: Health Department Basic Emergency Operations Plan	07-10-2013
Document 2.1.1 A.1.3	REQUEST FOR ADDITIONAL DOCUMENTATION: On-call training powerpoint	01-29-2014

### Insight #4: Be specific and concise

- Select documents that tell your story not War and Peace
- Documents should be focused and contain clear direction; scanned documents need to be readable
- If submitting an agenda, also include either a sign-in sheet or signed/dated meeting minutes
- Make sure the INTENT of the measure is met
- Be mindful to respond to requests asking for barriers or factors causing problems.

#### **Show and Tell**

- Tell the Site Visit Team where we can find the evidence within the document
- Make sure the description aligns with the PDF page number
- Show us by highlighting using arrows –text boxes
- Make sure we can open/read the document
- If using links make sure they are active during review process

### If you don't have it – say why

- Site visitors will appreciate your honesty
- •A memo from agency leadership explaining why you may not have the documentation, but what your plans are to produce it in the future is beneficial in the review

Non-acceptable Program Examp	oles
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Guidance from PHAB:

"PHAB's public health department accreditation does not address individual or personal health services."

- Primary Care
- Dental Clinics
- Home Health
- Social Services
- Mental Health Services
- Substance Abuse Services
- Domestic Violence Services

#### However...

- PHAB will accept documentation from a public health education program that informs the public of the need for dental hygiene; PHAB will not accept documentation from a dental clinic that provides individual dental services. (<a href="www.phaboard.org">www.phaboard.org</a>)
- Immunization clinic examples are not acceptable, but mass vaccination clinics to prevent the spread of an outbreak are acceptable
- Internships to educate on Public Health as a career is acceptable – nursing clinical rotations are not.

# Insight # 5 – Review before hitting the submit button

- If possible, have a "fresh set of eyes" open and review documentation
- Double check page numbers in description with document
- Check to make sure document matches title
- Look to make sure the document is dated, isn't in "track-changes" format and it isn't marked as a "draft"
- Take the time to do a review

# A special mention about meeting minutes

Make sure they:

- Are signed and dated
- Contain the names, titles and organizations represented when demonstrating collaborative efforts and/or elective official participation
- Are DETAILED a simple sentence "plan was reviewed" will usually not suffice to meet the measure.

#### Insight #6: Make it a Team Effort

- During the site visit, the accreditation coordinator can not be in all of the Domain interviews – important for those who are a part of the site visit were also a part of the documentation submission process.
- Decide as a team what documentation best represents your efforts – common threads ought to run through the entire organization.



# Why we ask questions and re-open measures

- Need verification or clarification of document submitted – may not be able to locate where in the document you want us to review.
- May need an additional example to conform with the intent of the measure
- Prepares site visitors and YOU in advance of the onsite visit

### Site Visit Agenda

- Site visit team proposes draft agenda
- Health department can offer revisions
- Invite board members and community partners well in advance to assure maximum participation

#### **Elements of Site Visit**

- Entrance Conference
- Tour of facility
- Sessions to discuss Strategic Plan, Community Health Assessment and Improvement Plan
- Individual domain sessions
- Interviews with community partners and board members
- Executive Sessions
- Exit Conference



# Insight #7: Site Visit is your time to shine!

- Be confident in your team and staff
- Share stories that back up the documentation submitted
- Select community partners who share your passion for public health
- Remember many of the site visitors have also been/are applicants – we know what you are going through!
- Celebrate what you have accomplished!



## Thank you and good luck!



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