



# Women's Wellness Connection

## Site Visit Process Overview

### Overview

The purpose of a Women's Wellness Connection (WWC) **Clinical Services or Care Coordination** site visit is to provide, promote and ensure quality breast and cervical cancer screenings in Colorado at our local agencies by focusing on administrative, management functions and clinical quality. Site visits serve as an opportunity to highlight the agency's program successes, challenges encountered, lessons learned, useful tools, and technical assistance needs. The site visit should last approximately **four to five** hours to complete. Site visits will be conducted by your agency's WWC Program Coordinator and the WWC Nurse Consultant. Other WWC or CDPHE staff may also observe the visit.

WWC staff will select agencies based on a risk assessment, assessing an agency's recent performance on CMS and whether the agency had significant organizational change within the year. For agencies that have multiple clinic locations, WWC staff will work with the agency's WWC Coordinator to select the most appropriate clinic location to conduct the visit.

### Steps involved with the visit:

## 1. Coordination and preparation for site visit

### Chart Audit

WWC staff will select 10 Clinical Services (**and five Care Coordination**) client medical charts to review prior to the site visit. WWC staff will verify the data entered into eCaST accurately reflects the information documented in the chart. Agencies will be provided eCaST ID numbers for charts approximately six weeks prior to the visit. In compliance with HIPAA regulations, WWC staff will only review information pertaining to the WWC program. You will NOT need to black out patient names. Please fax all required forms and pertinent health records, both from the electronic health record and any paper documentation to the attention of the WWC Program Coordinator at [303-758-3268](tel:303-758-3268) approximately three weeks prior to the site visit. **Do not email these charts.** The selection of charts to be reviewed is based on the following criteria:

- Normal cases
- Abnormal cases/complex cases
- Cases where clinical core performance indicators were not met
- Positive cancer cases

### Forms required to be faxed to WWC with each chart:

- Signed Consent Form
- Signed Lawful Presence Affidavit

- WWC Client Profile Tool or agency documentation of required elements on the WWC Client Profile Tool.
- The medical records for all breast and cervical cancer services needed for this review include, but are not limited to, documentation of breast and cervical education, medical history, breast and cervical screening and diagnostic procedures, radiology and pathology reports, and any other pertinent notes or documentation included in the client's chart.

### Other site visit preparation

Agencies will also be asked to submit the following information approximately two weeks prior to the site visit. All of these documents should be emailed to the WWC Program Coordinator.

- A completed Site Visit Prep Tool
- Description of agency - 250 words or less, should describe where clinics are located, number of women served at each clinic, other services provided and number and type of staff.
- **If your agency is also being asked to participate in a clinical chart audit, you will need to fax one copy of each of your agency's breast and cervical cancer screening policies/workflows, patient navigation/case management policies/workflows, breast and cervical patient education handouts, and the breast cancer risk assessment utilized at your agency.**

Agencies will be asked to provide the following at the onsite visit:

- a copy of HIPAA written policies/procedures
- Subcontracts or Memorandum of Understanding for WWC services.

## 2. On site visit

The site visit agenda is flexible to meet the needs of the agency and those involved with the visit.

### Sample Agenda

- Administrative/program management discussion
- Review of Site Visit Prep Tool
- Review of data chart audit results
- Review of policies (such as HIPAA)
- Physical tour of clinic
- Clinical process discussion and/or clinical chart audit results (this may include a 30 minute conference call with the WWC Nurse Consultant or a longer in-person visit).
- Wrap up

WWC staff will finalize the site visit agenda based on the completed Site Visit Prep Tool and Chart Audit results.

### 3. After site visit

#### Final report and cover letter

The WWC Program Coordinator will complete a site visit report documenting the visit. This report will be shared with the agency within one month after the site visit. Topics covered in this report will include:

- Summary of site visit
- Agency strengths and challenges discussed during site visit
- Required performance improvements
- Optional recommendations
- Action items discussed during site visit

#### Agency response to Required Performance Improvements

Agencies requiring performance improvements must respond in writing by within six weeks of the final site visit report date or the date indicated in the letter with a compliance plan that includes a timeline for action for full compliance by six months after the site visit. The response includes a signed letter, and any policies or procedures requested must be on agency letterhead.

### 4. Six months after site visit

Six months after the site visit, a check-in report will be sent to the agency. This report will request information on the implementation of required performance improvements made in the final site visit report. Agencies will have three weeks to respond to the check-in report.