

How to Use e-PHAB During and After the Site Visit: Guidance for Site Visitors

Updated March 2016

Overview

When the Site Visit Team arrives at the health department, the Accreditation Specialist will click a "Start Site Visit" button in e-PHAB. This will trigger a few changes in the Team's e-PHAB account including new home tab messaging, a new Quickview filter on the Doc. Submission tab, and the ability to request additional documentation.

Site Visitors may request additional documentation during the Site Visit. The health department must respond to all additional documentation requests prior to the beginning of the final Executive Session on the last day of the Site Visit. Documentation not submitted on time will not be accepted.

Unlike during the Pre-site Visit Review, the requests are sent by each Site Visitor to the health department one at a time and are not batched.

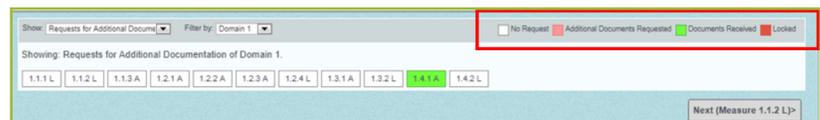
Questions?

Ask your assigned Accreditation Specialist.



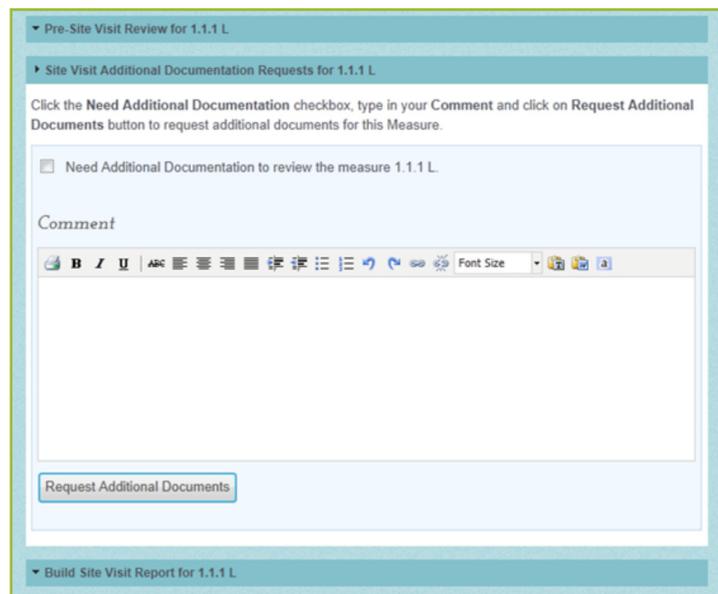
Quickview: Request for Additional Documentation

On the Doc. Submission tab, measures on the Quickview will all be white by default, for "No Request." When a Site Visitor requests an additional document, the measure will turn to pink for "Additional Documents Requested." When the health department has uploaded the requested documentation and resubmits it, the measure will turn green for "Documents Received." When it is time to start the final Executive Session on the last day of the Site Visit, the Accreditation Specialist will manually change any reopened measures to "Locked" and the measure will be red.



Reopening a Measure

To reopen a measure, navigate to a specific measure from the Doc. Submission Tab. On the Measure page, expand the "Site Visit Additional Documentation Requests" section:

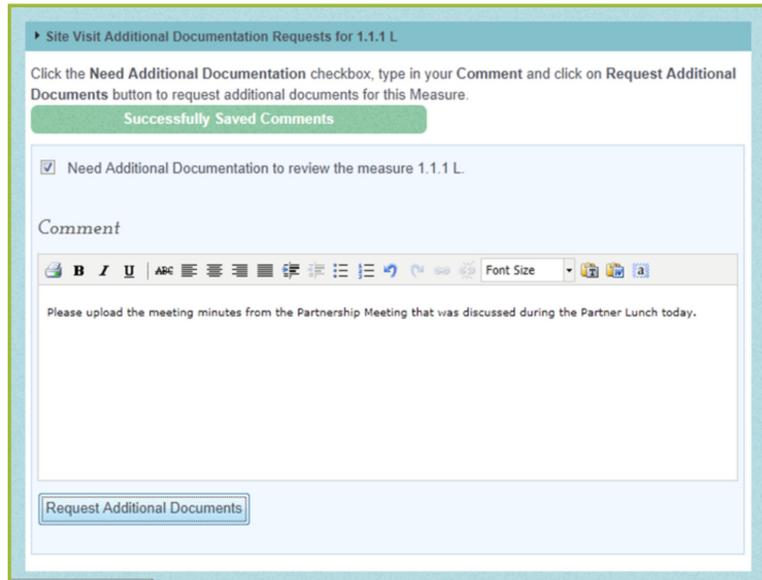


Click the check box in this section, type the request to the health department, and click the "Request Additional Documents" button. Be sure to make reference to the Required Documentation to which your request relates so that the health department knows where to upload.

A green message will appear briefly indicating the comments have been saved when you have clicked the "Request Additional Documents" button.

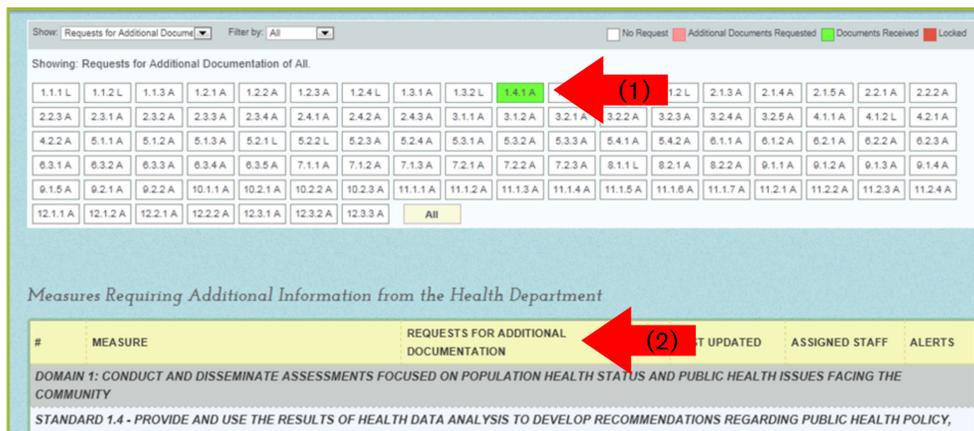
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Your Accreditation Specialist will approve and submit all documentation requests during the Site Visit (meaning the requests when you click the button are not sent directly to the health department).

The Site Visit Team will not receive an email alerting them when a document has been uploaded. The Site Visit Team will know from either (1) looking at measures that have turned green for “Documents Received” or (2) click on the main “Doc. Submission” tab and any measures that have been reopened are pulled to the top of the list:



#	MEASURE	REQUESTS FOR ADDITIONAL DOCUMENTATION	LAST UPDATED	ASSIGNED STAFF	ALERTS
DOMAIN 1: CONDUCT AND DISSEMINATE ASSESSMENTS FOCUSED ON POPULATION HEALTH STATUS AND PUBLIC HEALTH ISSUES FACING THE COMMUNITY					
STANDARD 1.4 - PROVIDE AND USE THE RESULTS OF HEALTH DATA ANALYSIS TO DEVELOP RECOMMENDATIONS REGARDING PUBLIC HEALTH POLICY,					

Navigate to the measure with the new documentation and it will be uploaded beneath the appropriate Required Documentation.

NOTE: When reviewing additional documentation provided, ensure the date of the document is on or before the date of the health department’s original documentation submission. The original submission date is located on the Home tab of the health department. Also ensure that the example is within PHAB’s scope of authority to review.

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Building the Site Visit Report

During and after the Site Visit, the Site Visit Team will revise text and potentially change scores, where appropriate. The “Build Site Visit Report” section on the Measure page contains all the text from the Pre-site Visit Review, but there are a few changes:

1. The Final Score is located within the “Build Site Visit Report” section (the score can be updated until the Final Review Status is Accepted).
2. There is an additional section called “Final Review Status” which is found at the bottom of the “Build Site Visit Report” section.

Each Domain Lead must select a Final Review Status. Selecting a Final Review Status that is not “Pending” locks the measure from other edits, so only select “Accepted” when you have written and reviewed all the narrative and have selected a final score for the measure.

Domain Leads that are not the Chair will select “Accepted by Site Visitor.” Once the Domain Lead selects this, the Chair knows to review that measure, and when satisfied, the Chair will select “Accepted by Chair.”

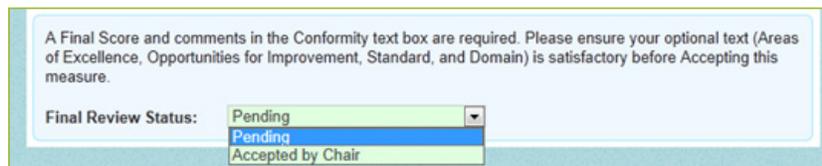


A Final Score and comments in the Conformity text box are required. Please ensure your optional text (Areas of Excellence, Opportunities for Improvement, Standard, and Domain) is satisfactory before Accepting this measure.

Final Review Status:

- Pending
- Accepted by Site Visitor
- Accepted by Chair

In measures where the Chair is the Domain Lead, there will be only two status options:



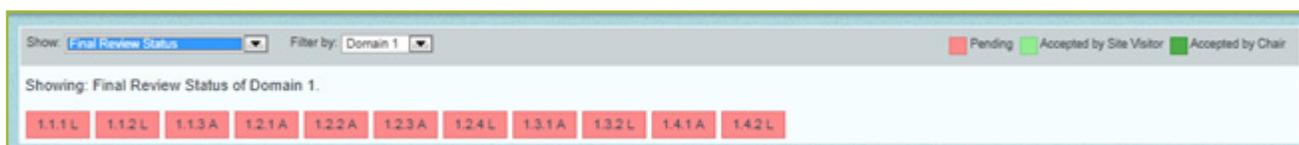
A Final Score and comments in the Conformity text box are required. Please ensure your optional text (Areas of Excellence, Opportunities for Improvement, Standard, and Domain) is satisfactory before Accepting this measure.

Final Review Status:

- Pending
- Accepted by Chair

The PHAB Accreditation Specialist will have edit capability at this time. In rare cases where the Team needs to edit text or a score, the Accreditation Specialist can change the status back to “Pending.”

The Team can filter the Quickview to show “Final Review Status” to show which measures are red for “Pending” (all measures will be pending by default), light green for “Accepted by Site Visitor,” or dark green for “Accepted by Chair.”



Show: Filter by:

Showing: Final Review Status of Domain 1.

1.1.1L	1.1.2L	1.1.3A	1.2.1A	1.2.2A	1.2.3A	1.2.4L	1.3.1A	1.3.2L	1.4.1A	1.4.2L
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Submitting the Site Visit Report to PHAB

When all measures have a Final Review Status of “Accepted by Chair” and the Chair completes the three overall questions on the Report tab (if not already completed during the Site Visit), a red button will appear on the Chair’s Home tab. The Chair must press this button to submit the Site Visit Report to PHAB. The Site Visit Report is due within two (2) weeks of the end of the Site Visit (14 calendar days including holidays and weekends).