

# Site Visit Report Development Tip Sheet for Site Visitors

March 2013

## General Guidance

- Provide ratings and conformity comments that are specific to the standard, measure, and requirements for documentation. Do not go beyond what is required in the Standards and Measures, Version 1.0.
- Do not personalize comments by referring to a person's personality, management approach, communication style, or other personal attribute.
- Do not include names of individuals. Instead, refer to "staff" or "the department director."
- Use abbreviations and acronyms sparingly. The Accreditation Committee might not be familiar with them.
- Write the report in the third person. Use "the Site Visit Team" or "the Team" rather than "I" or "we."
- When referring to a particular required documentation of a measure, identify it as "Required Documentation 1" or "RD 1," for example.
- When referring to a specific document provided by the health department, identify it by using the measure number and document number, e.g. 1.1.1 A 1.3.
- Check the spelling and grammar for the sections of the Site Visit Report you have been assigned.

For more information, contact the Public Health Accreditation Board at 703-778-4549.



## Purpose of the Site Visit Report

Keep in mind that the Site Visit Report has two audiences:

- The Accreditation Committee will use the report to make an accreditation decision.
- The Health Department will use the report for continuous quality improvement, annual reports to PHAB, and Action Plan (if required).

## Building the Report

Developing the Site Visit Report is a process that begins when the Site Visit Team is conducting the Pre-site Visit review of the documentation and ends when the Team has reached consensus and the Chair submits the Report to PHAB. Finalizing the Report will be more accurate and more efficient if the members of the Team keep notes and develop narratives through the different phases of the process. All ratings and narratives may be revised at any time until the Report is submitted to PHAB. Make sure that the ratings and comments are the most recent and are final before the Report is submitted to PHAB.

## Narrative Comments

### Domain and Standard Comments

- Domain and standard comments are not required, but are strongly encouraged. These comments provide a high level, overall summary of the Site Visit Team's impressions after review of the documentation and the interviews.
- Do not copy and paste the measure level conformity comments; summarize them.
- Be qualitative, not quantitative. Do not add up how measures were rated, e.g., two were Fully Demonstrated, three Largely Demonstrated, and one Slightly Demonstrated.

### Conformity Comments

- Provide the reader with a short explanation of how the measure was demonstrated or not demonstrated, including which requirements were evidenced in the documentation and which were not. Simply stating "the documentation met the measure" does not provide information about the documentation. Remember, the Accreditation Committee does not have access to the documentation but will rely on your description of what was included and what was missing.
- Be concise. Summarize your findings and reasons for the rating given.
- Be specific to what is required in the measure's conformity text box. Comments relating to areas that are beyond the requirements or areas for improvement may be written in the Area for Excellence or Opportunity for Improvement texts boxes.

### Areas of Excellence and Opportunities for Improvement Comments

- These comments are not required for every measure, but include them as you deem to be appropriate.
  - **Areas of Excellence** comments highlight an excellent practice or document that might be replicated in other areas in the department or other health departments. Do not merely indicate that particular documentation was well suited for a measure.
  - Include **Opportunities for Improvement** comments if a measure is rated less than Largely Demonstrated
  - Do not suggest activities or specific actions that should be taken to reach conformity with the measure when identifying **Opportunities for Improvement**. That is, do not suggest how they should reach conformity.
- These comments may be independent from the rating; that is, **Opportunities for Improvement** may be noted even if a measure is Fully Demonstrated and **Areas of Excellence** may be noted even if the measure is Not Demonstrated.