

HRSA Operational Site Visit (OSV) Preparation Outline*

(Approximately 8-10 weeks prep time)

Week 1:

- I. FQHC CEO and Program Officer schedule dates for Site Visit
- II. CEO contacts PCA Representative (Lisa Nieri) at AACHC
- III. CEO identifies Lead Person to serve as *Project Manager* for the prep period and convenes meeting of Management Team, i.e., Key Staff who will oversee each Section

Weeks 2-3:

- IV. **Notify Your Board** (CEO)
- V. Re-introduce Management Team to HRSA's "19 Project Requirements" and the "HRSA Site Visit Guide" developed from this. **OSV will score each of 19 requirements as "met" or "not met."** (CEO, Project Manager, or PCA rep).
- VI. Break down the Guide for Key Staff: they + their Staff will need to complete the questions in each section (PCA Rep or Project Manager)
 - Section I: **Need** (CEO, grants person, etc.)
 - Section II: **Services** (Med Dir, QI Dir., CI Mgr, Compliance, Operations, etc.)
 - Section III: **Management & Finance** (CFO, Finance, Billing, IT, etc.)
 - Section IV: **Governance** (CEO, etc.)
 - Appendix D: **Capital & Other Grant Review** (ARRA & ACA) (CEO, CFO, grants, etc.)
- VII. Managers meet with their staff to identify areas of responsibility
- VIII. Project Manager sets up central files for all information and documents to be placed (electronic filing &/or Banker Box)

Weeks 3-7: (Project Manager)

- IX. Team Members gather info on their areas and complete all responses. Forward to Project Coordinator/Manager along with all relevant documents.

Weeks 4-8:

- X. **Remind & Schedule Your Board** (CEO)
- XI. Gaps/Areas of deficit identified. Team & Staff work to close gaps. **Weekly Updates!**
- XII. HRSA Program Officer & Reviewers will call for a Conference Call 2-3 weeks in advance of Site visit. (CEO+ any others you want to include; LPL wants to be on call.)
- XIII. Reviewers request Documents to be emailed in advance & available on-site at the Visit. Approximately 75-100 docs (Project Manager ensures all sent/compiled)

Week 9:

- XIV. Final Review – CEO goes over entire Site visit Guide for completion and consistency (CEO+ Project Manager)

Week 10:

- XV. **Board Participation Verified** (as many Board members as possible)
- XVI. HRSA Site Visit – 3 days: All Key staff to be available (80-100% time of CEO & CFO; 50-75% time of QI/HR/CMO/COO; less for others) + Board members on 2-3 occasions for 2-3 hour meetings.
- XVII. PCA Rep on-site as much as requested by CEO; minimum = Opening + Exit sessions

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*Operational Site Visit (OSV) Preparation Timeline adapted from one prepared by MNACHC, Minnesota Association of Community Health Centers.