

## **Site Visit Requirements for Service Providers For All Provider Meeting 8/12/19**

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HIV Planning and Coordination (HIVPAC) conducts annual programmatic site visit for services funded under various grants including Ryan White, Housing Opportunities for Persons with AIDS (HOPWA), and California State Office of AIDS (SOA) grants. Based on these site visits, HIVPAC has identified processes, documentation methods, and/or procedures that are examples of best practices. In order to implement these best practices across all service providers, HIVPAC will be requiring all service providers to implement the following:

### **All agencies:**

- Initial and annual staff trainings that are required by the various standards of care shall be tracked on one central training log. A template will be provided by HIVPAC for service providers to document all trainings completed by staff (see attached). Providers also have the option of using their own training log with HIVPAC approval that includes all fields identified in the HIVPAC training log template.
- In order to expedite the review of site visit requirements, HIVPAC requests that items such as Policy and Procedures, organizational chart, and the training tracking log be submitted two weeks before the site visit is conducted. All required pre-site visit documentation that requires submission prior to site visit has been identified on the administrative tool in the far left hand column with a check mark (see attached). The due date for pre-site visit documentation to be submitted will be included on the site visit memo that is sent to each service provider 30 days prior to the site visit date. Required pre-site visit documents should be submitted via e-mail in a zip folder.
- As service providers utilize various databases and agency specific client identification numbers, it has become more difficult to track clients throughout the site visit process. In order to facilitate this process, HIVPAC will be implementing a template that will include the client's ARIES number, client's name, service provider specific ID (Agency ID) or Check # (for applicable Housing Services), and indication if the client file will be reviewed for multiple services. The template will be provided two days prior to the site visit and will include client ARIES ID numbers. Providers must populate the rest of the template and make the completed template available at the time of the site visit.
- All service provider Policies and Procedures should have an effective date and/or a revision date.
- For services that require Quality Assurance spot checks, service providers will need to use the HIVPAC site visit tool as outlined in the Standards of Care. A file containing completed peer and supervisor reviews should be maintained and available at the time of the site visit for review by HIVPAC staff.

### **For agencies utilizing paper files:**

- Agencies will need to provide a sample file with a key to where areas of inquiry from the site visit tools can be found in the client file.
- Agencies will need to tag required documents such as ARIES certificates, Notice of Privacy Practices, consents, etc. in the file in order to facilitate review of the file.

### **For agencies utilizing an Electronic Health Record (EHR) or Database:**

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- Agencies will need to provide a copy of the site visit tool as a sample with information under the notes section as to where the area of inquiry can be found in the database. This process will facilitate review and minimize the amount of time needed for the site visit.