

RECOMMENDED STEPS TO PREPARE FOR AND CONDUCT A CRITICAL ACCESS HOSPITAL SITE VISIT

Prepare for the Site Visit

1. Gather hospital characteristics
 - Examples:
 - [Example CAH Site Visit Survey](#)
 - Look at data on the facility, community, region, demographics; CAHMPAS is a comprehensive resource for finance, quality, and community health. Also, TASC's [Population Health Toolkit](#) is a good resource
 - Review the hospital's website
 - Read the local newspaper
2. Familiarize yourself with local health care and stakeholders.
 - Know the major health and economic partners and stakeholders. Including hospital ownership.
 - Be sensitive to local, regional or state grants or projects and cultures
3. Know what resources you can provide.
 - Bring materials to share based on preparation.
 - Talk about the impact of the national and state Flex Program.
 - Don't over promise. Say "I don't know, but I'll find out and get back to you."
 - Set an agenda and objectives ahead of time based on survey results and communicate the with the CAH leaders

Conduct the Site Visit

1. Keep the visit short (<1 hour)
 - Know which staff members you are meeting with.
2. Discuss successes and concerns in each core area of the Flex Program
 - Use survey results to guide conversation.



- Share resources.
3. Get a tour of the facility.
 - Allow the hospital to shine their spotlight.
 - Ask about future plans (programs, structure, staffing, initiatives, etc.)
 4. Follow-up.
 - Send a thank you note.
 - Respond to any promised technical assistance questions or resource requests.
 - Reach out with a phone call to CAH leadership ~3 months post visit.