PREPARING FOR YOUR PERSON-CENTERED CARE CERTIFICATION® VIRTUAL SITE VISIT

TOOLKIT:

Site Visit Role Descriptions

Virtual Certification Site Visit Readiness Assessment

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Participation Requirements

Participant Recruitment Tips

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THE PERSON-CENTERED CARE CERTIFICATION SITE VISIT

To achieve Person-Centered Care Certification, an applicant organization must demonstrate that it has effectively operationalized the person-centered concepts represented in the criteria. It is not sufficient for an organization to demonstrate satisfaction of the criteria through documentation and the Certification application; it must be apparent from interacting with stakeholders that the organization lives its commitment to person-centered care daily. Therefore, after reviewing the application materials, Planetree schedules a “lived experience” validation site visit. “Lived experience” refers to evidence that can only be acquired from interacting directly with organizational stakeholders. Approaches used to gather this lived experience evidence include the following:

- Observation of services and interactions
- Facility walk-through (with direction from the evaluation team of areas to visit)
- Focus groups and/or interviews with patients/residents and families
- Focus groups and/or interviews with staff and organization leadership (including leadership from the governing body or board of directors)
- Meeting with patient/resident and family partners
- Focus group and/or interviews with medical staff
- Meeting with the group that oversees organization-wide implementation of person-centered practices

Adapting the Site Visit to a Virtual Validation Process

When extenuating circumstances prohibit a Planetree team (or some members of the team) from gathering this lived experience evidence in-person, on-site at the organization, the feasibility of conducting the visit remotely will be explored. See Virtual Certification Site Visit Readiness Assessment.

A virtual site visit may involve all or some of the Planetree site visit team members participating remotely via videoconferencing technology. Arrangements will be made and pre-testing will occur well in advance of the virtual visit to plan for and troubleshoot potential challenges.

The intent of the visit remains the same – to capture the voices of key stakeholder groups in order to validate that the lived experiences of patients/residents, staff and leaders aligns with the evidence provided in the written application.

The format(s) used to capture these voices may vary based on availability, technology and other factors. They may include:
• **Meeting or Focus Group:** Site-based participants are co-located in a space equipped with videoconferencing capabilities. Certification site visit team participates remotely. Expectation is that all participants participate on camera* (Typical duration is 90 minutes)

• **Virtual Meeting or Focus Group:** All participants log on to the videoconference individually from their own device. Expectation is that all participants participate on camera* (Typical duration is 90 minutes)

• **Hybrid Meeting or Focus Group:** A blended approach wherein some participants log on to the videoconference as a group from a shared location and others log on individually from their own device. Expectation is that all participants participate on camera* (Typical duration is 90 minutes)

• **Video Chat:** A personal interview between the Planetree site visit team and a patient/family and/or staff member that occurs with video and audio. Video chats could occur with individuals at the point of care and/or at their home following discharge. Ideally, all participants will participate on camera*, but there is flexibility for audio-only phone conversations, as necessary. (Typical duration is 20-30 minutes)

(See [example of videoconferencing instructions](#) to be provided to participants –example is for the Zoom platform)

The format(s) used will be determined well in advance of the site visit, in consultation with the site visit point of contact and in consideration of the special needs and circumstances of participants. Determinations of the formats used will be made in order to:

• Maximize participation in the lived experience validation
• Utilize methods and tools that enable participants to build off of and respond to each others’ comments
• Ensure participants’ comfort with and ability to effectively use the tools.
• Adhere with regional/state mandates for physical distancing and the size of groups that can assemble.

* It is recognized that some patients/residents/family members may not feel comfortable being on camera. In this case, they will not be required to do so. Planetree will honor patient preference and preserve their privacy and dignity by conducting interviews over the phone.
Duration & Time Zone
The typical duration of a validation site visit is three to five days, depending on the size and complexity of the organization. Virtual site visit schedules will adhere to the local time zone of the applicant organization.

Cost
The cost of the Certification Validation Visit is the same, whether in-person or virtual. The actual cost depends on the size and complexity of the organization and affiliation with Planetree. An additional cost may be incurred if a neutral on-site escort is engaged to support the remote Planetree site visit team.

The Evaluation Team
Evaluation teams typically include two Planetree team members. However, the number of evaluators and the length of the site visit will be determined by Planetree based on information in the application, including the size and complexity of the organization.

For virtual site visits, an additional team member local to the region and neutral to the applicant organization may be engaged as on-site escort. This person supplements the remote participation of the Planetree team and provides an added set of eyes and ears to observe interactions and the physical environment. On-site escorts will be included as members of the site visit team at the discretion of Planetree, based on need and availability.

The Site-Based Team
A site visit point of contact and IT point of contact will be identified as part of the virtual site visit feasibility assessment process. These individuals will provide their direct contact information to the Planetree site visit team so that if any issues arise during a session require immediate attention, they can be reached quickly to resolve them.

See Role Descriptions for additional detail.
Note on Participation Requirements for Virtual Site Visits

The involvement of constituents served is essential to any person-centered approach. Patient/resident, family, staff and leader feedback, therefore, is a pivotal component of the evaluation process. The use of neutral moderators in safe environments encourages comments of all types -- positive and negative. It is through these groups, meetings and interviews that the evaluation team can hear firsthand from those being cared for and the team of caregivers about how the site’s person-centered approach has made an impact on their personal experiences.

During the site visit, a variety of focus groups, meetings and/or interviews will be conducted. These Voice of the Stakeholder groups are the primary ways that Planetree validates successful implementation of the criteria and sufficient participant is essential to a successful site visit.

In-person site visits have specific minimum requirements for focus groups. Because of the added complexity of managing a large group conversation virtually, there are no per-group participation requirements. Rather, over the course of the virtual visit, it is expected that 25 to 40 patients/residents/family caregivers will participate and 45-60 staff will participate.

It is essential that participants in patient/resident/family focus groups not have any other relationship with the organization (e.g. as a volunteer, current or former employee, Board member, etc.). They should have had an encounter with the application organization with the past 6-12 months prior to the site visit to ensure that they can speak to the “current state” of person-centered care.

It is the applicant’s responsibility to ensure minimum participation levels in the virtual site visit. The applicant’s point person recruits participants, confirming their availability to participate in focus groups and/or interviews during the visit. At least three weeks prior to the site visit, the organization must have a plan in place to ensure adequate participation in the focus groups, meetings and/or interviews.

If participation in the scheduled session is inadequate, either because of the number of participants or because the participants have a relationship with the site, Planetree may require additional sessions to be scheduled, at the applicant’s expense, before reaching a certification decision.
PERSON-CENTERED CARE CERTIFICATION LIVED EXPERIENCE EVALUATION

VIRTUAL SITE VISIT SAMPLE* SCHEDULE

(All times reflect the local time zone of the applicant organization)

*This template schedule is intended as a starting point to co-design a schedule that works for each organization. This schedule reflects the stakeholder groups we must speak with, but particularly for virtual site visits, there is considerable flexibility in the types of sessions used as well as in the sequencing of the agenda.

Breaks between sessions are necessary for the site visit team to debrief the previous session and prepare for the next.

Types of Sessions

- **Meeting or Focus Group:** Site-based participants are co-located in a space equipped with videoconferencing capabilities. Certification site visit team participates remotely. Expectation is that all participants participate on camera. (Typical duration is 90 minutes)

- **Virtual Meeting or Focus Group:** All participants log on to the videoconference individually from their own device. Expectation is that all participants participate on camera (Typical duration is 90 minutes)

- **Hybrid Meeting or Focus Group:** A blended approach wherein some participants log on to the videoconference as a group from a shared location and others log on individually from their own device. Expectation is that all participants participate on camera (Typical duration is 90 minutes)

- **Video Chat:** A personal interview between the Planetree site visit team and a patient/family and/or staff member that occurs with video and audio. Video chats could occur with individuals at the point of care and/or at their home following discharge. Ideally, all participants will participate on camera, but there is flexibility for audio-only phone conversations, as necessary. (Typical duration is 30 minutes)

**Dry Run (approximately 1 month prior to Day 1 of the site visit)**

| 2 hour time block | A 2 hour videoconference meeting with the Certification team and a Planetree IT point person and the applicant site’s site visit point of contact and IT point of contact to test systems and prepare site-based staff for what to expect during the visit. |
**Day 1:**
8:30 AM – 10:00 AM  Meeting with Senior Staff, Governing Body Representative and Site Visit Point of Contact

10:30 AM – 12:00 PM  Employee Focus Group – Non-Supervisory Staff

12:30 PM – 2:00 PM  Employee Focus Group – Managers and Supervisors

2:30 PM – 5:00 PM  Inpatient Video Chats (to include current inpatients and individuals at home following discharge)

5:30 PM – 7:00 PM  Physician Focus Group

**Day 2:**
7:00 AM – 8:30 AM  Employee Focus Group – Non-Supervisory Staff (aim for third shift participation)

8:45 AM  Check-in with site visit point of contact (if needed)

9:00 AM – 10:30 AM  Meeting with Person-Centered Care Oversight Group

11:00 AM – 12:30 PM  Outpatient Video Chats and/or Virtual Focus Group (ED, outpatient testing & procedures, etc.)

1:00 PM – 2:30 PM  Meeting with Patient and Family Partnership Council

3:00 PM – 4:30 PM  Employee Focus Group – Directors

5:00 PM – 6:00 PM  Flex Time (can be used for environmental audit, additional patient interviews, additional staff interviews, behavioral health patient interviews, etc.)

**Day 3:**
8:30 AM  Check-in with site visit point of contact (if needed)

9:00 AM – 12:00 PM  Report Preparation and Flex Time for Additional Lived Experience Evidence Capture

1:00 – 3:00 PM  Meeting to deliver preliminary results and debrief with senior staff and visit coordinator
Recruiting Patient/Resident/Family Participants for Focus Groups/Meetings/Interviews

It is the responsibility of the site visit coordinator to recruit participants to share their experiences over the course of the site visit. For a successful recruitment effort, follow these recommended steps:

1. **3-4 weeks prior to the virtual site visit**, send an invitation from the organization’s leader to a small group discussion.
   - Include mention of an incentive to participate such as a gift certificate to the local mall.
   - Express the importance of their opinions as you look for ways to enhance their experience at your healthcare center.
   - Be clear that the session will be facilitated by Planetree and not a representative from the organization.

2. When someone accepts the invitation to participate, email them instructions for participating in the videoconference, along with the log-in information.

3. **1 week prior to the virtual site visit**:
   - Begin calling invitees randomly until you have confirmations from the maximum number desired for each focus group, plus several extra – ask them to put the date on their calendars and let them know they will be receiving an email with log-in information to join the session.
   - Reach out to everyone who has agreed to participate in a session to ensure they received the log-in information and instructions for participating. Provide contact information of someone they can contact with any questions or concerns about the technology.

4. **1-2 days prior to the virtual site visit**: Make follow-up reminder phone calls to all confirmed participants. Remind them that they will receive a thank-you gift for giving their time.

   See sample focus group recruitment letters.
Logistics of Interacting with Staff, Patients/Residents, & Family During a Virtual Site Visit

The logistics of conducting virtual focus groups, meetings and one-on-one interviews with patients, long-term care residents, family caregivers and staff will require advance preparation and flexibility. In partnership with the site visit coordinator, all participants should be provided any necessary log-in information and instructions in advance of the session. (See example of videoconferencing instructions to be provided to participants – example is for the Zoom platform)

As necessary, the site visit team will be prepared to convert a group session into a one-on-one interview, as well as to condense the question sets to accommodate a shorter interview. Some patients/residents may not feel comfortable being on camera. In this case, they will not be required to do so. Planetree will honor patient preference and preserve their privacy and dignity by conducting interviews over the phone. Every effort should be made by the site visit coordinator to ascertain the patient/resident/family caregiver preference in order to adjust the schedule accordingly in advance, and ensure ample participation.

Ideally, small groups of individuals (from the same stakeholder group) will participate in a shared discussion group, scheduled for 90 minutes. All participants – including the Planetree team -- will be on camera for the duration of the group. If the group is co-located, a private space should be provided where their comments are not heard by those not participating in the discussion. If staff are participating from their own spaces within the campus, accommodations should be made to ensure their privacy.

When safety concerns, logistics, physical distancing mandates or other considerations, preclude this “ideal” arrangement, other accommodations may be made to meet the overall intent of capturing the voices of a representative cross-section of stakeholder. However, there are some fundamental principles that must be maintained, regardless of the discussion format:

- A site visit point person appointed by the applicant site should be on the premises at all times to facilitate the virtual site visit and answer questions for the Planetree team. They should be present to welcome participants and help them to get settled (either on-site or in the virtual space), however they must excuse themselves from the conversation before the session formally gets underway.

- In order to preserve the confidentiality of the sessions, only individuals representing the applicable stakeholder group for a session should be present for that session (either in-person or remotely). No one from the applicant organization is permitted to observe the sessions. This includes IT support, site visit coordinators, members of the management team -- unless they are participating as a participant in the discussion. (The site visit point of contact and IT point of contact should provide their direct contact information to the Planetree site visit team so that if
any issues arise during a session require immediate attention, they can be reached quickly to resolve them. For this reason, it is not necessary that they be in the room for troubleshooting.)

• Participants should anticipate participating in spontaneous conversation. They should not come with any prepared notes or speaking points.

• Accommodations should be made to ensure group sessions and/or interviews can be held in private, with no one other than the participants privy to the conversation.

• The confidentiality of the sessions must be maintained. Sessions will not be recorded. Participants should not record or take pictures on their personal devices, in respect for the privacy of all other participants. Detailed notes will be transcribed by the site visit team, but no specific comments or quotes will be attributed to a person by name. Any clearly identifying information will be deleted to maintain the confidentiality of comments in the visit debrief presentation and/or final written report.

• It is important to ensure all participants have the opportunity to voice their perspectives. Facilitators will only mute participants if background noise is disruptive to the conversation. They will only do so after notifying the group of the need to mute participants. Instructions will be provided for how to unmute oneself as well as how to contribute comments via a chat function. The lead facilitator of the focus group will engage participants, sequence the questions appropriately, and manage time and participation, including the chat window. The scribe will take detailed notes during the session to capture participants’ voices and experiences. Chat transcripts will be saved and incorporated into the detailed notes from the session.
Site Visit Facility Walk-Through

A modified walk-through of the facility will be incorporated into the virtual site visit to more closely observe specific areas of the environment that emerge as potential concerns, either through the stakeholder conversations or the application review. When an on-site escort is present, he or she will accompany the site visit point of contact to areas requested to be seen by the remote Planetree site visit team. The on-site escort will be complete the facility walkthrough with a phone, tablet and/or laptop equipped with both video and audio capabilities in order to share the experience with the remote team. If there is no on-site escort present, the site visit point of contact will communicate with the remote site visit team via a phone, tablet and/or laptop equipped with both video and audio capabilities.

If there are any areas with poor wi-fi connection and/or where conducting observations via videoconference would compromise patient privacy, dignity or modesty, the site visit team should be notified as far in advance as possible so that alternative arrangements can be made for observing the space.
Sample Email/Letter to Recruit Patient/Resident/Family Participation in Virtual Site Visit

Dear ________________________,

I would like to invite you to take part in a small group discussion on [INSERT DATE and TIME] about your experience as a patient/resident or family caregiver at [INSERT NAME OF ORGANIZATION]. In order to maintain recommended physical distancing, this discussion will take place remotely, using videoconferencing technology. Once you indicate your ability to participate, you will receive a follow-up communication with information and instructions for joining the videoconference. The discussion will last no longer than one and a half hours.

***If you are concerned about your ability to use the technology or do not have access to a computer or mobile device that would enable you to participate, please reach out so that we can make an alternate arrangement for you to participate.***

The discussion will be facilitated by a team from an outside, not-for-profit organization, Planetree International. [NAME of ORGANIZATION] is in the process of pursuing a prestigious certification for excellence in person-centered care. We have already submitted a written application to Planetree International and now their team members would like to hear directly from you about your personal experiences as a patient/resident or family caregiver. Your voice is crucial to this effort. After all, as a patient/resident—or a loved one of a patient/resident—YOU are the expert on the patient/resident experience here.

The only way for us to continually improve the patient experience is to understand what goes well (so we can do more of it!) and what hasn’t gone well (so that we can put in place plans to make it better.) Your participation in this process will provide invaluable insights to guide those ongoing improvement efforts.

If you would like to take part in the virtual focus group on [INSERT DATE], please let us know by contacting [INSERT NAME AND CONTACT NUMBER] or e-mailing [INSERT EMAIL ADDRESS]. (Note: You could also use a reply slip for people to respond if necessary and provide a pre-paid return envelope.)

Sincerely,

[Signed by CEO/Administrator] [Site Visit Coordinator]

P.S. In appreciation of your time and input, you will receive a $XX gift certificate redeemable at [INSERT DETAILS ON THANK YOU GIFT]
Sample Email/Letter to Recruit Staff Participation in Virtual Site Visit

Dear ____________________________,

I would like to invite you to take part in a small group discussion on [INSERT DATE and TIME] about your experience as a caregiver at [INSERT NAME OF ORGANIZATION].

The discussion will be facilitated by a team from an outside organization, Planetree International. [NAME of ORGANIZATION] is in the process of pursuing a prestigious certification for excellence in person-centered care. We have already submitted a written application to Planetree International and now their team members would like to hear directly from you about your personal experiences as staff member here. Your perspective as a caregiver is crucial to this effort.

The only way for us to continually improve the patient and staff experience here is to understand what goes well (so we can do more of it!) and what hasn’t gone well (so that we can put in place plans to make it better.) Your participation in this process will provide invaluable insights to guide those ongoing improvement efforts.

Due to the travel restrictions and the need for physical distancing during these times, the Planetree team will be facilitating these discussions remotely using videoconferencing technology. Once you indicate your ability to participate, you will receive a follow-up communication with information and instructions for joining the videoconference. The discussion will last no longer than one and a half hours.

***If you are concerned about your ability to use the technology or do not have access to a computer or mobile device that would enable you to participate, please reach out so that we can make an alternate arrangement for you to participate.***

If you would like to take part in the virtual focus group on [INSERT DATE], please let us know by contacting [INSERT NAME AND CONTACT NUMBER] or e-mailing [INSERT EMAIL ADDRESS].

Sincerely,

[Signed by CEO/Administrator]
VIRTUAL PERSON-CENTERED CARE CERTIFICATION SITE VISIT READINESS CHECKLIST

This tool is designed to help Planetree and your team determine if a virtual Person-Centered Care Certification site visit is feasible for your organization. Please complete this form and email it to Christy Davies, Director of Certification, at cdavies@planetree.org.

Organization: __________________________________________

Contacts

CEO/Administrator: _______________________________________

Planetree Site Visit Point of Contact: __________________________
   Email Address: __________________________________________
   Office Phone: __________________________________________
   Cell/Mobile: ___________________________________________

Information Technology Point of Contact: ______________________
   Email Address: __________________________________________
   Office Phone: __________________________________________
   Cell/Mobile: ___________________________________________

Anticipated Timeframe of Certification Site Visit: ______________

Please suggest 3 possible dates and time approximately 4-6 weeks ahead of your anticipated site visit date for a dry run of the technology. Please allow approximately 90 minutes for the test.

Option #1 Date:______________________________   Time:_________

Option #2 Date:______________________________   Time:________________________

Option #3 Date:______________________________   Time:________________________
<table>
<thead>
<tr>
<th>Questions</th>
<th>YES</th>
<th>Unsure</th>
<th>No, this will be a problem for us.</th>
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</thead>
<tbody>
<tr>
<td><strong>STAFF AVAILABILITY AND CAPACITY</strong></td>
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<tr>
<td>Are you able to assign a site visit point person from your staff who will be available virtually to the Planetree site visit team for planning the site visit and troubleshooting during it?</td>
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<tr>
<td>Are you able to assign an IT support point person from your staff who will be available virtually to the Planetree site visit team for planning ahead for IT needs and troubleshooting technology issues that may arise during the visit?</td>
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<tr>
<td>Is your leadership team available to participate in a virtual meeting at the beginning and close of the virtual site visit? (Anticipated meeting time is 90 minutes for the introductory meeting and 120 minutes for the closing meeting.)</td>
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<tr>
<td>Do you have the ability to pull together groups of clinical and non-clinical staff to meet virtually with the Planetree team for approximately 90 minutes at a time in a private space? (Potential approaches for these meetings include group videoconference calls where individuals log-on individually from their own locations; a group meeting held in a room with internet connection that allows for video discussions; or a hybrid of these two approaches.)</td>
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<td>Is your steering team available to participate in a virtual meeting during the site visit?</td>
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<tr>
<td><strong>TECHNOLOGY CAPABILITIES</strong></td>
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<tr>
<td>Is the organization equipped with reliable, high-speed internet access?</td>
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<tr>
<td>Does your organization have the capabilities to join Zoom videoconferencing meetings?</td>
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<td>If your organization does not have the capabilities to join Zoom videoconferencing meetings, do you have an alternative videoconferencing preference? (See question #1 below)</td>
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<tr>
<td>If your organization does not have the capabilities to join Zoom videoconferencing meetings, does your alternative videoconferencing platform have the ability to promote a guest user to the host?</td>
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<tr>
<td>Does your videoconferencing system use SIP connections?</td>
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<tr>
<td>Are there any locations within the campus that do not have reliable internet access? (see question #2 below)</td>
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</tbody>
</table>
### ACCESS TO PATIENTS & FAMILY CAREGIVERS

<table>
<thead>
<tr>
<th>Question</th>
<th>YES</th>
<th>NO</th>
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<tbody>
<tr>
<td>Do you have the ability to provide the Planetree site visit team with opportunities to meet with current inpatients -- optimally via videoconference or alternatively over the phone?</td>
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<tr>
<td>Do you have the ability to coordinate small virtual group meetings and/or one-on-one interviews with recently discharged patients (and family members) – optimally via videoconference or alternatively over the phone? This will include recruiting participants and providing the technical support to enable their participation.</td>
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<tr>
<td>Are your patient/family partners available to participate in a virtual meeting during the virtual site visit?</td>
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</tbody>
</table>

**TRANSLATION**

If applicable, do you have the ability to engage independent interpreters to participate in the meetings and/or interviews virtually?

The following are common areas the Planetree site visit team may request to visit virtually. This will require a virtual tour with a staff escort equipped with a camera with video and audio capabilities. *Please indicate the feasibility of touring the following areas in this way.*

<table>
<thead>
<tr>
<th>Area</th>
<th>YES</th>
<th>NO</th>
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<tbody>
<tr>
<td>Patient room / resident room in a long-term care community</td>
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<tr>
<td>Exam space (for physician offices)</td>
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<tr>
<td>Waiting areas/family lounge areas</td>
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<td>Behavioral health unit</td>
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<td>Emergency department</td>
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<td>Staff breakroom or “off stage space”</td>
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<tr>
<td>Main entrance/lobby</td>
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<tr>
<td>Outpatient locations</td>
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<tr>
<td>Dining space (for long-term care communities)</td>
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<tr>
<td>Other areas as requested by the Planetree team</td>
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</tbody>
</table>
OTHER:

1. What platform does your organization typically use for videoconferencing?
   ________________________________________________________________.

2. What, if any, areas within the campus do not have reliable internet access?
   ________________________________________________________________.

3. How is the organization connected to the internet?
   [ ] Broadband/Lan  [ ] High-speed wireless  [ ] Other: ________________

4. What barriers or obstacles do you foresee that would stand in the way of the Planetree site visit team being able to evaluate your organizational culture through a virtual site visit?
Person-Centered Care Certification Virtual Site Visit Roles and Responsibilities

The Planetree Site Visit Team

**Planetree Evaluation Team:**
- Identifies priority areas for evaluation based on application review
- Works collaboratively with site visit point of contact to schedule visit
- Provides preparatory materials to site visit point of contact to support participant recruitment
- Works collaboratively with site visit point of contact to develop the visit agenda, including determination of the type of interview type is most suitable for each group
- Coordinates “dry run” testing call
- Available to provide pre-visit support and troubleshooting
- Participate in all scheduled meetings, groups and interviews on camera.
- Maintains contact with site visit point of contact for the duration of the virtual site visit
- Leads daily virtual huddles with site visit partner(s) for the duration of the virtual site visit
- Reports findings to the leadership team at the conclusion of the virtual site visit
- Writes the Certification report
- Reports findings from site visit to the Person-Centered Care Certification Committee

**Planetree IT Contact**
- Conducts pre-audit of site’s technology infrastructure to ensure adequate Internet connections, screen resolution and sound quality to support the visit
- Participates in “pre-flight” testing of the IT systems prior to the site visit
- Available to Planetree site visit team to troubleshoot any potential IT issues that arises during the virtual site visit
- Documents details of videoconferencing platform teams will use to conduct virtual visit and passes on any special instructions Planetree team may need to use said platform

**On-Site Escort**
- A neutral partner from within the region who is able to participate as an on-site presence. This person supplements to the remote participation of the Planetree team and provides an added set of eyes and ears to observe interactions and the physical environment.
- On-site escorts will be included as members of the site visit team at the discretion of Planetree based on need and availability.
- Participates in daily virtual huddles with the site visit team for the duration of the virtual site visit.
- Assists with gathering additional evidence on-site, as requested by the site visit team
• Participates in report of findings to the leadership team at the conclusion of the virtual site visit

Site-Based Team

Site Visit Point of Contact

• Works collaboratively with Planetree site visit team to schedule visit and develop the visit agenda, including determination of the type of interview type is most suitable for each group
• Responsible for recruiting participants for all meetings, groups and interviews and ensuring sufficient participation to meet requirements.
• Participates in all pre-flight testing calls
• Remains on the premises at all times to facilitate the site visit and answer questions for the Planetree team. This person does not, however, attend the focus group sessions.
• Serves as a virtual escort to provide remote Planetree team the opportunity to view physical spaces within the organization.
• For each group session, welcomes participants ensures everyone in the room is comfortably seated and that all participants can see/be seen by the camera.
• To be available at the end of the session to say thank you in person after the session is over and distribute the “thank you” gift for patient/resident/family participants.

IT Point of Contact

• Collaborates with Planetree IT contact on pre-audit of site’s technology infrastructure to ensure adequate Internet connections, screen resolution and sound quality to support the visit
• Participates in “dry run” testing of the IT systems prior to the site visit
• Available to troubleshoot any potential IT issues that arises during the virtual site visit

Interpreter (as needed)

• Should be a qualified, neutral party
• Participates in pre-flight testing call
• Participates in all necessary focus groups, interviews, and meetings that require translation services
• Participates in report of findings to the leadership team at the conclusion of the virtual site visit
Joining a Zoom Meeting Overview

Before joining a Zoom meeting on a computer or mobile device, you can download the Zoom app from Zoom’s Download Center. Otherwise, you will be prompted to download and install Zoom when you click a join link. The Zoom link will look something like this: https://planetree.zoom.us/j/744675134

If Joining via Computer:
You can click on the Zoom link provided to you to access the meeting or in your browser, go to https://zoom.us/join, enter your 9 digit meeting ID number in the text box and click Join.

If this is your first time joining from Google Chrome, you will be asked to open the Zoom application to join the meeting. Click Open Zoom Meetings

Just before entering the meeting you will be prompted to enter a display name. This name is simply to identify you in the meeting.
Join Audio via Computer Audio/Phone Call

After joining a Zoom meeting, you will be prompted to join the audio automatically. If this prompt does not appear or you close out of it, click Join Audio in the meeting controls. If you wish to join audio via the telephone, follow the instructions further down, otherwise simply select Join Computer by Audio.

If Joining via Telephone

1. On your phone, dial the teleconferencing number provided in your invite.
2. Enter the meeting ID number when prompted using your dialpad.

Note: If you have already joined the meeting via computer, you will have the option to enter your 2-digit participant ID to be associated with your computer. If you have not joined on your computer, simply press # again when prompted to enter in your participant ID.
When you join a Zoom meeting hosted by another user, you are considered an attendee. The user who scheduled the meeting or was selected to be the alternative host will have host controls.

**Attendee Controls:**

The attendee controls appear at the bottom of your screen if you are not currently screen sharing.

- **Mute / Unmute:** Mute and unmute your microphone.
- **Audio Controls** (click the ^ arrow next to Mute / Unmute): Allows you to change the microphone and speaker that Zoom is currently using on your computer, leave computer audio, and access the full audio settings.
- **Start Video / Stop Video:** Turns your camera on or off.
- **Video Controls** (click the ^ arrow next to Start Video / Stop Video): Change cameras if you have multiple cameras, select a virtual background (if enabled), or access your full video settings.
- **Invite:** Invite others to join your meeting.
- **Participants:** See who is currently in the meeting and option to raise your hand.
- **Share Screen:** Start a screen share (if the host allows). You will be able to select the desktop or application you want to share.
- **Chat:** Access the chat window to chat with the participants.
- **Record:** Start or stop a local recording. Attendees do not have access to start a cloud recording.
- **Leave Meeting:** Leave the meeting while it continues for the other participants. Only the host can end the meeting.

Tip: Use the following keyboard shortcuts to mute or unmute yourself:

- Windows: Alt + A
- Mac: Shift + Command + A