

## Checklist Guide for Grantee Site Visit

Grantee:

Dates:

Meet administrators (as scheduled by Program Manager):

Meet key community partners (as scheduled by Program Manager):

1. Strategic Plan Action Plan
2. Community Assessment Activities and Results
3. Community Health Improvement Activities
4. Case Finding efforts
5. Immunization Program
  - Review vaccine handling and storage system/logs
  - Discuss outreach/rates
6. Charting
  - Chart Audits
  - Timelines - complete charting in 24 hours
  - Record retention project progress
7. Quality Assurance
  - Scales and stadiometers/logs
  - Medical directives and other foundational documents up to date
  - Safety Meeting minutes
  - Pharmaceuticals and Supplies management
  - Tracking system for incoming referrals
8. OSHA
  - Location of Safety Manual
  - Location of MSDS
  - Sharps/needle injury logs
9. EPSDT and well child health care
10. Scheduling – How does clinic work and how is it done in villages?
11. Sliding Fee Discount/Fee For Service processes and Chart Audits
12. Manuals and reference resources used
  - SharePoint Manual and contents
  - Policies and Procedures and Medical Directives
  - Public Health Nursing Core Competencies
  - Scope and Standards for Public Health Nursing Practice
13. Patient Education materials
14. Community Resource lists
15. Typical client encounter, from making appointment to leaving after service obtained
16. Preparedness Activities
17. Key issues that are locally specific
18. Other activities as identified

2025.03