

# Success at the Site Visit: Step by Step Review of the Agenda

David A Mullins MD MBA CPE FACS  
WVU Medicine  
Princeton, WV

1

---

---

---

---

---

---

---

---

## Disclosures

- NOTHING TO DISCLOSE

2

---

---

---

---

---

---

---

---

## Agenda Overview

- Site Information
- Site Profile
- Site Contacts
- Data Platform Contacts
- Invoice
- Schedule Site Visit
- IRB
- Networks
- Network & Metasploit Applications
- NCDB Reporting Tools
- Site Visit History
- File Sharing
- Resources

- Site Visit Resources**
- 2023 Site Visit Agenda and Instructions
  - 2024 Site Visit Agenda and Instructions
  - Site Reviewer Profiles
  - Pre-Review Questionnaire (PRQ) PDF
  - Required PRQ Documents
  - Site Visit Experience Survey (to be completed within 14 days of a site visit)
  - Marketing Resources (For programs with "Accredited" status only)
  - Corrective Action Instructions and Required Documents
  - Assess Form

3

---

---

---

---

---

---

---

---

**Agenda Overview**

- Required elements:
  - Leadership/Cancer Committee/Staff Meeting
  - Cancer Liaison Physician Meeting
  - Facility Tour
  - Operative and Pathology Report Review
  - Multidisciplinary Cancer Care Conference
  - Summation

4

---

---

---

---

---

---

---

---

**Leadership/Cancer Committee/Staff Meeting**

- Can be separate meetings at program's and/or site-reviewer discretion
- Want to pick the time to maximize attendance
- Opportunity for both executive team and cancer committee

5

---

---

---

---

---

---

---

---

**Cancer Liaison Physician Meeting**

- If virtual, can be on separate day
- Required video component
- Best if CLP has some familiarity with NCDB tools
- Should be a one-on-one meeting

6

---

---

---

---

---

---

---

---

**Facility Tour**

- Format of your choice
- Can use marketing video
- Can be creative
- Present what makes your facility unique

7

---

---

---

---

---

---

---

---

**Operative and Pathology Report Review**

- Requires communication with site-reviewer about expectations
- Be upfront about non-applicable cases
- For in-person:
  - Pre-review the requested documents
- Standards 5.3, 5.4, 5.5 and 5.6
  - 2023
- Standard 5.7 and 5.8
  - 2021, 2022, and 2023

8

---

---

---

---

---

---

---

---

**Multidisciplinary Cancer Care Conference**

- Should be consistent with "normal" cancer conference activity
- No need to pick "interesting" cases

9

---

---

---

---

---

---

---

---

### Summation

- Avoid too large time gap from other elements
- Allow time to all parties to ask questions
- Attendance is key for the future of your program

---

---

---

---

---

---

---

---

10

### In-person versus Virtual

**In person**

- All elements of agenda on same day
- Chart review needs pre-review to make sure all elements available

**Virtual**

- Technical issues
- Attendance can be more difficult to control

---

---

---

---

---

---

---

---

11

### Key Takeaways

- Agenda sets the stage for success
- Finalizing times allows for best attendance
- Site reviewer will assist on developing the agenda

---

---

---

---

---

---

---

---

12

**Thank you**

---

---

---

---

---

---

---