**Siyenza – Site Visit SOP**

**Pre-Visit Instructions**

* Identify your team and contact team members to: 1) identify your sites and 2) establish a communication plan
  + Note to TDYers:
    - Review TDY schedule (excel), review site list tool (excel)
    - Contact prior site lead to your sites, if applicable
    - Request to be added to your district’s WhatsApp group to improve communincation
* Contact your district team to arrange clinic visits, coordinate with to both Project Officer (PO) and Activities Manager (AM); invite NDOH (National, Provincial or District Department of Health) representative, as appropriate
* Key tools and documents to review prior to site visit
  + List of Indicators (word) and reference as needed;
  + Siyenza targets (excel) to understand your site-level targets
  + Siyenza dashboard (excel) to understand your site-level progress:
  + List of Interventions
  + Checklists
  + Minimum Requirements
  + Additional Tools (PICT Screening tool, Retention survey, Tracking tracing tool, Staffing tool)
* Have a facility report-card ready to distribute during the visit
  + Note: Consult old dashboards (e.g., Feb/Frenzy (excel), as necessary, for historical information). Contact SI as needed for dashboards (Vanessa Da Costa: [otd2@cdc.gov](mailto:otd2@cdc.gov)).
* Upon arrival, plan to spend Monday in Pretoria attending in-brief meetings with SA CDC teams, then travel to sites

**Guidance for Visits**

***Initial Visit:***

* Meet with partner and district lead prior to visit begins to discuss strategy
* Begin site visit with introduction of Siyenza to facility manager
  + Discuss key goals, data, targets, solicit facility concerns and challenges
  + Consider facility walk-through up front
* Go through the facility assessment checklists (word) to identify issues: Siyenza – Facility Visit Indicator Assessment Tool (word) to assess data quality, PICT, linkage, retention, tracking and tracing.
  + Summarize key “challenges and opportunities” on these issues at the end of the document to be shared during the outbrief to inform the following week’s visit (keep soft copy to facilitate sharing)
  + Review suite of interventions for priorities (word)
  + Use the “challenges and opportunities” table to record plan that can be shared (i.e., key priorities, indicator, trend, change/intervention proposed, person responsible)
* Review additional tools with partner, if needed:
  + Tracking and tracing tool (excel); discuss tracking and tracing SOP
  + Rapid survey of missed appts. tool (excel) if better understanding of missed appts. is needed
* Initial site visit should ensure focus on linkage, retention, and data quality. Once Retention/Linkage and ART initiation and facility accountability are addressed, follow-up on case finding—this will likely be done at the follow-up visit
  + Complete facility metrics tool to understand PICT, (excel) headcount and who is eligible for screening/testing
  + Assess use of HIV risk screening tool (power point) for adults and children; Review/distribute if not in use

***Follow-up visits***

* Review prior notes/issues/plans (including handover files for TDYers)
  + Have clinic team meet to discuss progress and review ongoing checklist issues
  + Follow-up on case-finding as mentioned above (i.e., facility metrics tool (excel) and risk screening tools (power point))
  + Review use of any tools (i.e. index testing, tracking and tracing tool)
  + Continue to update notes on issues and plans in a way that can be electronically shared (i.e., priorities, indicator, trend, change proposed, person responsible)

**Post-visit**

* Open your file on the Share Drive/Git Hub and complete the following tools:
  + **Minimum requirements checklist**
  + **Facility Recommendations**
* Attend your partner/district specific meeting to keep your district lead and PO abreast of any issues identified
* Note to TDYers:
  + Plan for your last Friday to be at SA office to while on 2 week TDY (if shorter, discuss with office in advance)
  + Update other team member of key findings prior to your departure