



SITE VISIT CHECKLIST

1. BEFORE THE SITE VISIT – *PRE-WORK*

- Complete the Barrier Assessment and return to DCRI COORDINATE Diabetes team.
- Complete the baseline survey.
- Select 2 case studies to present.
- Provide DCRI team with list of providers and emails to send training links.
- Provide DCRI team with any current protocols or patient facing education materials.

2. PREPARE FOR THE SITE VISIT–

- Invite appropriate team members and provide DCRI team with a list of projected attendees with their roles. (e.g. Cardiologists, Diabetes Care Specialist/ Endocrinologist, PharmD, Research Team, Social Worker, Clinic Staff)
- Provide DCRI team with contact person and cell phone # to reach upon arrival as well as correct address and room # for agenda. (Please include wayfinding and parking instructions)
- Discuss appropriate scheduling with DCRI team (time frame of grand rounds, clinic team, shadowing etc.)
- One-week query of participating provider clinics: diabetes, atherosclerotic disease, and use of SGLT2, GLP1ra, etc.
- Survey of local pharmacies concerning cost of evidence-based diabetes drugs

3. DAY OF THE SITE VISIT

- Team will need the ability to project presentation. (HDMI set up preferred)
- Ensure someone is available to meet the team upon arrival
- Have sign-in sheet available (Include: name, credentials, email, phone number)

4. AFTER THE SITE VISIT

- Call will be scheduled to discuss the site visit summary and discuss next steps.
- Create action plan focused on screening, enrollment, and guideline-recommended management of T2DM and CVD patients in the clinic