

Post Site Visit Comment Revision Tips

Congratulations on completing your site visit! Now that you have learned more about the applicant through the site visit interviews and reviewing the documentation, it is time to finalize your comments for the final feedback report.

Editing Comments

If after site visit you need to edit your comment to better convey the strength or OFI to the applicant, go ahead and change the actual language in Scorebook Navigator. Follow up the change by documenting why you changed the comment in the "Findings" section of the site visit form.

1. Open Scorebook Navigator
2. Navigate to the comment that needs to be modified
3. In the comment section, update the comment to reflect the new comment
4. Then, select the capital V to open the Site Visit Issue form
5. In the findings section, document a sentence of two to summarize what you learned on site and one of 3 conclusions of how it will change the comment. Some examples of summary findings are:
 - Keep OFI, no change
 - Edit OFI – change from approach to deployment. They demonstrated an approach but workgroups xyz are not using it yet.
 - Change OFI to strength – process is in place, fully deployed, with cycles of learning.
6. Double check your comments to make sure it matches your summary findings.
7. Hit "save"

Deleting Comments

If after the site visit you have a comment that will no longer give the applicant value-added feedback, you can delete that comment from the final feedback report. **DO NOT** delete the entire row. This removes the site visit form and all history of the consensus comment. Instead, follow these process steps:

1. Open Scorebook Navigator
2. Navigate to the comment that needs to be modified
3. In the comment section, erase the original comment and replace with "Deleted per Site Visit"
4. Then, select the capital V to open the Site Visit Issue form
5. In the findings section, document a sentence of two to summarize what you learned on site that deleted the comment and one of 3 conclusions of how it will change the comment. An examples of a summary findings is:
 - Delete OFI – evidence on site presented to show this has been addressed.
6. Double check your comments to make sure it matches your summary findings.
7. Hit "save"

Here is an example of the original comment from consensus:

Opportunities for Improvement (include figure references, as appropriate)			
KF Ref.	OFIs	Rationale	Item Ref. Observation
P.2b(2), P.2b(1)	It is unclear if LOTS has a systematic approach for analyzing relevant data and developing information for use in its strategic planning process. LOTS identifies key performance data and information that it collects during Step 2 (Analyze) of the SPP; however, no clear approaches or methods for analysis are identified. A process for analyzing selected data as part of the SPP development process may help LOTS create an attainable strategic plan that addresses its strategic challenges and leverages its strategic advantages.	Important gap for the organization. While it collects data, a systematic approach analyzing these data prior to developing the strategic plan may help improve the long-term effectiveness of the plan. Overall [KH, AV]	2.1a(3)

Here is what it would look like if we deleted after site visit

Opportunities for Improvement (include figure references, as appropriate)			
KF Ref.	OFIs	Rationale	Item Ref. Observation
<input checked="" type="checkbox"/> P.2b(1) <input type="checkbox"/> P.2b(3) <input type="checkbox"/> P.1b(5) <input checked="" type="checkbox"/> P.2b(2)	Deleted per site visit	Important gap for the organization. While it collects data, a systematic approach analyzing these data prior to developing the strategic plan may help improve the long-term effectiveness of the plan. Overall [KH, AV]	<input type="checkbox"/> 2.1a <input type="checkbox"/> 2.1a(1) <input type="checkbox"/> 2.1a(2) <input checked="" type="checkbox"/> 2.1a(3) <input type="checkbox"/> 2.1a(4) <input type="checkbox"/> 2.1b <input type="checkbox"/> 2.1b(1) <input type="checkbox"/> 2.1b(2)

Pro Tip: Deleting a comment should be extremely rare. While onsite, make sure you are asking questions that move the applicant right (ADLI or LeTCI) and move the applicant down (B/O/M). Following this method, you may be able to rework the comment to meet the applicant where they are, even if they are further along than you originally thought during consensus.