

**Ryan White Program**  
**Performance Improvement Advisory Team**  
**Minutes of May 15, 2009**  
*Behavioral Science Research*  
*2121 Ponce de Leon Blvd., Suite 250*  
*Coral Gables, FL 33134*

#	Members	Organization	BSR Staff
1	Carla Valle-Schwenk	OGC	Christina Bontempo
2	Jocelyne Coles	Helen Bentley Family Health Center	Susy Martinez
3	Patricia Roberts	University of Miami	Sandra Sergi
4	Jasmin O'Neale-Lewis	University of Miami	Ariela Eshel Bernstein
5	Karen Hilton	University of Miami	Kim Tardalo
6	Karelia Godinez	Citrus Health Network	
7	Ruth Weber	Empower U	
8	Tom Pietrogallo	Care Resource	
9	Iris Chamagua	Mercy Hospital	
10	Kathy Mercogliano	University of Miami	
11	Ed McGowan	Concept House	
12	Sergio Lindarte	South Florida AIDS Network	
13	George Barroso	North Dade Health Center	

1. PIAT members reviewed the April 17, 2009 minutes. No changes were made.
2. Standing Business
  - Medical Case Management Updates
    - *Technical Assistance (TA) Visits* – Ariela Bernstein informed the PIAT that, as of April 2009, the TA visits will focus on the Financial Assessment progress notes and the Comprehensive Assessment. While the focus has shifted, QM staff will continue to review required documentation and the Financial Assessment. The section of the review tool dedicated to the Comprehensive Assessment has been revised in preparation for the TA visits and may be revised again at a later date. Revisions were made to ensure that the review tool assessed the quality of documentation and emphasized components of medical case management (MCM) such as adherence to treatment and medical appointments.
    - *Monthly Medical Case Management Training* – Sandra Sergi informed the PIAT that the May 2009 training provided a summary of the topics covered since May 2008 such as required documentation and the Financial Assessment. The goals of the training were to both summarize the information taught over the course of the year as well as evaluate supervisors' proficiency.
    - *Quarterly Supervisors Training* – The training focused on the Financial Assessment, required documentation, and knowledge of Service Descriptions. In addition, supervisors completed selected questions from the MCM proficiency exam and provided QM staff with feedback regarding the TA visits.

- *General MCM Issues* –
  - Sandra noted that QM staff reviewed the training attendance for all MCMs and supervisors during Year 18; most met or exceeded the training hour requirements.
  - Ariela asked the PIAT to recommend topics for Year 19 trainings. George Barroso recommended a review of HHS outpatient medical care guidelines. Sandra noted that QM staff would like to include RW Program providers as speakers to discuss issues that are relevant to RW Program clients and providers (e.g., mental health matters, nutrition, and cultural competency). Kathy Mercogliano commented that the trainings should provide information that is practical and appropriate.
- *Oral Health Care Record Reviews* – Ariela stated that both agency-specific and aggregate results were presented to the Oral Health Care Subcommittee during their quarterly meeting. Since none of the agencies scored 80% or above, the performance threshold agreed upon by the subcommittee, all were required to submit Corrective Action Plans. Common areas for improvement among all providers included documentation of oral hygiene, nutrition and tobacco education and referral. Since the scores received on these sections were low system-wide, the County requested that these sections be excluded and results be re-analyzed in order to view the quality of all other services provided. The revised reports, along with the aggregate report, are being sent to all providers. Providers have been informed that, although these sections have been removed from the final report, QM staff and the County are expecting improvement in education and referral during the follow-up review, tentatively scheduled for November 2009.
- *Client Satisfaction Surveys* - Clarice Evans stated that nine of twenty sites have been visited thus far and 300 interviews completed.

### 3. **New Business**

- *Medical Case Management Self Assessment* – Sandra updated the PIAT on the self assessment national study funded by Abbott and headed by Julia Hidalgo of Positive Outcomes. All five of Florida's Ryan White Part A programs are participating; locally, all Miami-Dade Ryan White Program Medical Case Management providers are participating. Results will be disseminated later in the year.
- *Medical Case Management Proficiency Exam* – The PIAT were asked to help finalize the next steps in addressing the results of the exam (i.e., the date of the re-test, the agencies' follow-up responsibilities, etc). Carla noted that the County sees the follow-up in Quality Improvement terms. She suggested re-testing those MCMs who did not score 85% or above on either or both sections of the exam three months after the date results were distributed. MCMs would be trained by their agencies, as well as BSR's QM staff, in preparation for the re-test. Kathy asked if there was a pattern of missed questions. Sandra responded that the test has been shown to be valid but an item analysis indicates that two questions were scored poorly by both the top scorers and all MCMs tested. Sandra added that overall, MCMs who have taken the exam previously have improved scores in both sections. Sandra asked the PIAT for their recommendation on how to prepare the MCMs for the exam. Carla noted that supervisors must be actively involved in the process. Sandra suggested each QM staff member be responsible for their TA sites. Carla asked whether the same exam will be provided at the re-test. The PIAT agreed it would. The PIAT decided that the re-test will be

administered in August after training provided by supervisors and QM staff, and MCMs will be required to retake only the section/s on which they scored below 85%.

- *Activity Code Pilot Study* – Preliminary analysis of the results has begun. Analysis will be provided during the July 17 meeting.
4. **Announcements** - Christina notified the PIAT of the following:
    - a. The Department of Health Prevention Planning Group is requesting providers and consumers to complete a survey online for their Needs Assessment; the surveys are due on May 22 (flier provided)
    - b. An HHS press release announces the funding for HIV/AIDS for 2009 (flier provided)
    - c. A new website named 'Questions are the Answer' can be a helpful resource to consumers on questions they should ask their physicians (flier provided)
  5. **Next Meeting** – Friday, July 17 2009 (June's meeting will be cancelled due to the annual Needs Assessment meetings; all PIAT members were encouraged to attend at least one Needs Assessment meetings)