



Ryan White Program Performance Improvement Advisory Team
Minutes of July 17, 2009
Behavioral Science Research
 2121 Ponce de Leon Blvd., Suite 250
 Coral Gables, FL 33134

#	Members	Organization	BSR Staff
1	George Barosso	North Dade Health Center	Ariela Eshel Bernstein
2	Nathalia Calabrese	Citrus Health Network	Christina Bontempo
3	Frederick Downs		Bob Ladner
4	Karelia Godinez	Citrus Health Network	Sandra Sergi
5	Karen Hilton	University of Miami	Kim Tardalo
6	Sergio Lindarte	South Florida AIDS Network	
7	Ed McGowan	Concept House	
8	Kathy Mercogliano	University of Miami	
9	Jasmin O'Neale-Lewis	University of Miami	
10	Tom Pietrogallo	Care Resource	
11	Marie Presmy	Mercy Hospital	
12	Paul Staffelbach	The Village South	
13	Carla Valle-Schwenk	OGC	
14	Ruth Weber	Empower U	

1. PIAT members reviewed the May 15, 2009 minutes. No changes were made.
2. Standing Business
 - Medical Case Management Updates
 - *Technical Assistance (TA) Visits* – Ariela Bernstein informed the PIAT that, in June no TA visits were conducted due to the needs assessment process. During June, the review tool was revised to emphasize required documentation and those sections of the Comprehensive Health Assessment (CHA) that are currently the focus of the TA visits.
 - *Monthly Medical Case Management Training* – Sandra Sergi informed the PIAT that the trainings for the rest of the year have been planned. In August, Miriam Nichols, a mental health professional, will host the training. During the year, the monthly trainings will dedicate a significant amount of time to a review of the CHA, components of Medical Case Management (MCM), and documentation of medical issues. In addition, training and assessment modules developed by The AIDS Education and Training Centers (AETC) may be modified for use by MCM in the CHA.
 - *Quarterly Supervisors Training* – Jane Petrick is scheduled to host the supervisors training in August.
 - *Proficiency Exam* – Ariela informed the PIAT that the TA visits during July were dedicated to a review of the MCM Proficiency Exam with those MCM who scored below the established 85% threshold on either or both sections of the exam (Knowledge of HIV/AIDS and Knowledge of MCM Duties). Retests will be administered in August at Behavioral Science Research (BSR).

- *Miscellaneous* –Frederick Downs noted that there has been discussion at the Partnership and Housing Committee meetings regarding coordination between MCMs and Housing Opportunities for Persons With AIDS (HOPWA) housing specialists. Carla Valle-Schwenk reported that the County met with the local HOPWA Program administrators and discussed the implementation of the Social Security Income (SSI)/Social Security Disability Insurance (SSDI) Outreach Access and Recovery (SOAR) Program. Frederick explained that there was confusion as to whether or not assisting clients with SSI and SSDI applications is a function of MCM. Sandra clarified that it is one of the responsibilities of MCM.

3. **New Business**

- *Record Reviews – Update*
 - *Oral Health Care* – Ariela informed the PIAT that QM staff has requested Corrective Action Plan (CAP) follow-up reports from all Oral Health Care providers in order to ensure that providers are implementing the action items noted in their CAPs. Follow up record reviews are tentatively scheduled for November.
 - *Prescription Drugs* – Ariela informed the PIAT that Joanne Orrick, PharmD, from AETC will assist QM staff with a Prescription Drug Provider Record Review. The review tool is being revised and PIAT will have an opportunity to evaluate the document before it is finalized. Reviews are expected to begin in September and should take approximately three months for completion. The review will be the first Ryan White Program Prescription Drug Provider Record Review conducted in the County
 - *Outreach* – Ariela informed the PIAT that while most record reviews focus on core services , this year QM staff selected a support service as well. Outreach was chosen due to the revisions made to the service description as well as the BSR studies focusing on clients who are lost to care. The QM staff will conduct a fact finding study in August to review outreach processes and documentation. Results of the study will inform the development of an Outreach Record Review tool to be used in the full scale review, scheduled for later in the Fiscal Year.
 - *Quarterly Record Reviews – First Quarter Report Card* – Ariela informed the PIAT that a majority of agencies submitted their record reviews by the deadline. Carla noted that compliance has greatly improved and suggested that supervisors be informed of these improvements. Ariela commented that providers were asked to submit charts current to the quarter being reviewed as charts selected for review during the TA visits are selected from those submitted by the agencies. Sergio Lindarte thanked Ariela for the deadline reminders.
- *Revised Comprehensive Assessment Review Tool* – Ariela asked the PIAT to review the three revised sections of the tool: Health and Medical History, Medications, and Adherence to Medications. Sergio raised a question regarding the lack of specification for the Hepatitis A testing requirement. Ariela replied that the CHA will be revised during the year and a question regarding Hepatitis A may be added if necessary. Sergio recommended the AETC medical record review tool be used as a reference when revising the CHA. He added that the Centers for Disease Control and Prevention (CDC) have revised the terminology used for TB screening. George commented that the Service Delivery Information System (SDIS) does not allow the option of selecting more than one payer of medications in the medications section of the CHA.; Carla will ask Automated Case Management Systems (ACMS) to correct that.

- *Needs Assessment – Service Utilization (MCM and Oral Health Care)* – Ariela informed the PIAT that data presented at the Needs Assessment meetings will be shared with the appropriate groups and committees over the next couple of months. Ariela explained the Cost per Client by Service Category and Number and Percent of Ryan White Program Clients Receiving Various Services spreadsheets (copies on file). It was noted that a total of 9,630 clients were served in Year 18 and the top utilization and highest cost service categories were Outpatient Medical Care and MCM. The PIAT reviewed Oral Health Care and MCM service utilization data (copies on file) specifying costs, utilization and demographic data. Ariela noted that the data validates some of the findings from the Oral Health Care Record Reviews and the Activity Code Pilot Study
- *ADAP Application Status Report* –Ariela informed the PIAT that Dr. Jeff Beal, Medical Director at both AETC and the Florida Department of Health Bureau of HIV/AIDS, asked BSR to assist ADAP in identifying clients who were at risk at having their cases closed by the ADAP database on June 30th due to being overdue for their re-enrollments. Dr. Romero provided a list of 140 clients by medical case manager and by agency. BSR contacted the agencies and requested they follow up with clients. Once all of the information was received from the agencies BSR provided Dr. Romero with the updated information.
- *Activity Code Pilot Study – Preliminary Data Analysis* –Some of the goals of this study were to see if there was a difference across agencies, to assess the usefulness of activity codes, and to apply the results of this study to the continued discussion regarding MCM caseloads. Ariela detailed the results while attendees reviewed the data analysis spreadsheets (copies on file). The PIAT recommended implementing this study on a larger scale and for a longer period of time in order to validate the findings.

4. **Next Meeting** – Friday, August 21, 2009