



**Ryan White Program Performance Improvement Advisory Team**  
**Minutes of March 19, 2010**  
*Behavioral Science Research*  
 2121 Ponce de Leon Blvd., Suite 250  
 Coral Gables, FL 33134

*Approved April 16, 2010*

#	Members	Organization	Guests	Organization
1	George Barroso	North Dade Health Center	Cesar Nunuz	SFAN
2	Idania Tellez	Citrus Health Center		
3	Jocelyne Coles	Helen B. Bentley		
4	Elizabeth Davis	Jessie Trice Community Health Center		
5	Frederick Downs	Partnership Chair		
6	Charles Garcia	CHI		
7	Karen Hilton	University of Miami		
8	Sergio Lindarte	SFAN	<b>BSR Staff</b>	
9	Joe Martinez	ACMS	Ariela Eshel	
10	Ed McGowan	Concept House	Beth Hayden	
11	Kathy Mercogliano	University of Miami	Sandra Sergi	
12	Jasmin O'neale-Lewis	University of Miami	Kim Tardalo	
13	Tom Pietrogallo	Care Resource		
14	Marie Presmy	Mercy Hospital		
15	Johnny Rogers	Empower "U"		
16	Carla Valle-Schwenk	Office of Grants Coordination		
17	Ruth Weber	Empower "U"		
18	Rokecia Wright	CHI		

1. Ed McGowan called the meeting to order and asked for introductions.
2. PIAT members reviewed the January 15, 2010 minutes. Two corrections were made: 1) A typo was found on the last page; "newly positive" should be changed to "new positive" and 2) on the first page, Trudy Conway's organization should be changed to the University of Miami.
3. **Standing Business**
  - **Medical Case Management Updates**
    - *Technical Assistance (TA) Visits* – Focus continues to be the Comprehensive Health Assessment and Plan of Care (POC). The TA visits have focused on emphasizing the link between assessing the client, identifying needs, and creating and following up on a treatment plan. Improvement has been noted.
    - *Monthly Medical Case Management (MCM) Training* – February and March trainings focused on the fundamentals of documentation and appropriate use of encounter codes. Emphasis was placed on following documentation standards as well as on ways to reduce over documenting and duplication of effort.
  - *Record Reviews –Update*
    - *Prescription Drugs* – All reviews have been completed. The last report will be disseminated shortly. Once all agencies receive their individual reports, an aggregate

report will be provided to all Ryan White Program funded pharmacies, the PIAT, Medical Care Subcommittee, and Care and Treatment Committee. A targeted follow-up review will take place later in the year.

- *Oral Health Care (OHC)* – Five of eight reviews have been completed. Two reports have been sent and three more will be disseminated within the next two weeks. The last 3 reviews are scheduled for the last week of March. Once all agencies receive their individual reports, an aggregate report will be provided to OHC providers, the PIAT, Medical Care Subcommittee, and the Care and Treatment Committee.
- The AIDS Education and Training Center (AETC) plans to return at a later date to provide TA. Dr. Stewart, AETC Dental Director, is scheduled to attend the September OHC Subcommittee's meeting to discuss her system-wide findings and provide recommendations.

#### 4. **New Business**

- *Upcoming Activities*

- *MCM Training Attendance Record* – Members reviewed a spreadsheet (copy on file) summarizing MCM's attendance at the monthly MCM trainings during Fiscal Year 19. All agencies exceeded the minimum 20 hours of training required for MCMs. Detailed reports by MCM and agency will be provided to the Office of Grants Coordination (OGC) on a quarterly basis. The attendance record of MCM supervisors was not included in the report but a review of the attendance record indicates most supervisors were in compliance with minimal attendance requirements.
- *Activity Code Follow-Up Study* - The study is completed. The MCM's daily logs are being reviewed and compared to the billing in the SDIS. Data will be entered and analyzed this month and preliminary results will be presented at the April PIAT meeting.
- *Client Satisfaction Survey* - Notices have been sent to all agencies. The survey tool is in the process of review and translation into Spanish and Creole. The survey is scheduled to begin in April with 600-650 individuals. The survey should take approximately 30 minutes; interviewees will receive a \$20 food voucher.
- *April 2010 Town Hall Meeting* - A Town Hall Meeting will be held in response to HRSA's mandate that Ryan White Part A programs identify HIV+ individuals unaware of their status, have them tested and linked to care and treatment. Members reviewed the list of invitees and topics to be discussed; they added the Dade Medical Association to the list. PIAT members were interested in what percent of new positives return for post-test counseling. Carla Valle-Schwenk reported that this data is in the RDR and can be shared at the next meeting.

- *QM Activities*

- *Summary of FY 19 QM Activities* – Ariela Eshel reported the activities completed last fiscal year:
  - *QM Website* – The Partnership and QM sections of the [www.aidsnet.org](http://www.aidsnet.org) website are completed. During FY 20, QM staff will update the past and current record reviews posted on the site.
  - *MCM Proficiency Exam* – The exam was administered for the third consecutive year; those who did not pass the first time received tutoring from BSR QM staff.

- *Financial Assessment (FA)* – Revisions were made to the FA to increase efficiency, reduce data entry error, and assure that all appropriate proof of income is included.
  - *Activity Code Pilot Study* – The study was completed and the results were shared; the follow-up activity code study data is currently under analysis.
  - *Record Reviews* – Several reviews were completed: A full scale OHC record review and follow-up, full-scale pharmacy record review, follow-up substance abuse and outpatient medical reviews, and an outreach fact finding study.
  - *TA Visits* – TA visits were conducted on a monthly basis at all MCM agencies.
  - *Monthly meetings* – Scheduled monthly meetings include the ACMS-OGC-BSR meetings and PIAT.
  - *Needs Assessment* – QM staff contributed to the annual needs assessment process.
  - *Grant Application* – QM staff contributed to the annual grant application process.
  - *Two activities tabled for FY 20* – 1) MCM Basic Training and 2) quarterly community forums dedicated to client education.
- *Planned QM Activities for FY 20* - Ariela Eshel reported planned activities for the upcoming fiscal year:
- *Record Reviews* – Both targeted and full scale reviews are scheduled for FY 20 in coordination with AETC: 1) Follow-up pharmacy and outpatient medical record reviews, 2) A system-wide record review of mental health services.
  - *MCM* - Revision of MCM Standards and creation of MCM Handbook with the assistance of AETC and DOH. Results of Julia Hidalgo’s national MCM survey will also be included if available.
  - *MCM Monthly Trainings* – Sponsors for the trainings have been booked for the entire year. Most training topics are set, including: a review of Medicaid programs and eligibility, Hepatitis B and C, a review of Ryan White Program funded services by providers emphasizing the specific needs of Ryan White Program clients (e.g., mental health and psychosocial services, legal services, and substance abuse services), and MCM skills such as documentation. Staff is considering the recommendation to videotape the monthly trainings and post them as a reference on [www.aidsnet.org](http://www.aidsnet.org).
  - *Supervisor Trainings* - Jane Petrick and BSR staff will each conduct two of the quarterly trainings.
  - *MCM Basic Training* – The agenda for a two-day Basic Training will be developed and shared with PIAT.
  - *MCM Proficiency Exam* – BSR has recommended that established MCMs take the exam every three years and new MCMs take the exam after being in the system at least 3 months and no longer than 12 months. The Service Delivery Guidelines require new MCMs to complete the HIV 104 within one month of hire; PIAT asked that this be changed to 90 days and agreed that the proficiency exam should be required within the first six months. OGC will make a final decision on this.
  - *TA Visits* – The visits will continue on a monthly basis at all MCM agencies.
  - *Outreach Training* – Training topics have been identified during the PIAT meetings; development and planning are underway.

- *Client Satisfaction/Health Literacy Survey* - The results of the health literacy component of the survey will be used to tailor the proposed client education community forums.
  - *Monthly ACMS-OGC-BSR Meetings* – Meetings will continue to be held on a monthly basis.
  - *Provider forums* – Vincent Omachonu, a renowned QM expert, will present at two forums this year.
  - *Comprehensive Plan* – PIAT will continue to review and take action on the activities assigned to PIAT and the QM program.
  - *Miscellaneous* –
    - Members reviewed the Resource Guide for Miami-Dade County Ryan White Program Medical Case Managers and identified a few minor errors; this will be corrected and the document will be available on the QM and County websites and in the Service Delivery Information System (SDIS).
    - Carla thanked QM staff for their work.
  - *AETC Module on Adherence* – Members reviewed the module and Joe Martinez explained that it can be programmed into the SDIS under the Comprehensive Health Assessment section. Tom Pietrogallo recommended that staff review the Case Management Society of America protocols for treatment adherence.
5. **Next Meeting** –The next meeting will be held on Friday April, 16<sup>th</sup>, 2010.