

RYAN WHITE PART B PEER REVIEW 2009-2010

Virginia Department of Health

Division of Disease Prevention

HIV Care Services

Chart Review

Comprehensive Case management

ID#

	YES	NO	COMMENTS
1. Is the client's status in comprehensive case management reflected in the client's records?			
2. Screening:			
<ul style="list-style-type: none"> Was screening done within 3 working days of referral or initial phone call? 			
3. Intake:			
<ul style="list-style-type: none"> Was the intake done within 10 working days of the initial screening? 			
3. Assessment:			
<ul style="list-style-type: none"> Was the assessment completed within 30 days of intake? 			
<ul style="list-style-type: none"> Does the client's record contain documentation of why the 30 days was not meet? 			
4. Individualize Service Plan (ISP) Development:			
<ul style="list-style-type: none"> Is it apparent that the case manager and the client developed the ISP together? 			

	YES	NO	COMMENTS
<ul style="list-style-type: none"> Is the ISP signed and dated by both the client and the case manager? 			
Has the ISP been completed within 45 days after assessment?			
<ul style="list-style-type: none"> Does the client's record contain documentation of why the 45 days was not meet? 			
<ul style="list-style-type: none"> Is the ISP signed and dated by the comprehensive case manager and client and in the client's record? 			
<ul style="list-style-type: none"> Is there documentation that the goals are being addressed? 			
<ul style="list-style-type: none"> Is there documentation that the goal related to medical outcome being used is in accordance with the VDH HIV/AIDS Case management Standards? 			
<ul style="list-style-type: none"> Is there documentation who s responsible for the action steps (case manager/client)? 			
<ul style="list-style-type: none"> Is there documentation of the target date of each action? 			
<ul style="list-style-type: none"> Is there documentation of the results of the each action? 			
<ul style="list-style-type: none"> Is there documentation that actual medical outcome showing numerical value? 			

	YES	NO	COMMENTS
<ul style="list-style-type: none"> Is there documentation of ISP's implementation including frequency of contacts (at least twice every 30 days), documentation, and progress and or barriers toward goals? 			
5. Individualized Service Plan (ISP) Reassessment			
Is the ISP reassessed at least every 90 days ?			
Has the client/case manager signed and dated the revised ISP?			
Is there documentation that the client meets at least one criterion for comprehensive case management after reassessment?			
6. Discharge			
Does the client no longer require case management?			
Is there documentation in the client's record to note the client is offered transiently supportive case management for an additional 90 days if they no longer meet the criteria?			
When all goals and issues have been met and no new issues have been identified, is discharge planning in collaboration with the client started?			

	YES	NO	COMMENTS
Is there a discharge summary present in the client's record which contains: -consumer's name -date service began -special consumer needs -services needed/actions taken -statement in summary that all identified issues have been met/or not met -date of discharge -reason for discharge -referrals made at time of discharge?			
7. Referrals			
Are referrals tracked and their outcomes documented in the service plan, or other forms used by case managers?			
Is documentation present in the client's record documenting regular contact at least once every 90 days with other case managers?			

Reviewer: _____ **Date:** _____

Subcontractor staff(s) interviewed: _____