



# Individual Quality Review Reviewer's Training January 30 - 31, 2018

**Training Location:** Homewood Suites  
1520 Sunport Place SE, Large Conference Room  
Albuquerque, NM 87106

## Please Bring With You

**Note:** We will have access to the internet from the Hotel.

### Items to bring: (watch this list as it may grow between drafts)

- ✓ The final agenda as a paper agenda will not be provided;
- ✓ Reviewer's Guide a paper Reviewer's Guide will not be provided;
- ✓ Expectations of Reviewers and Case Judges (In the front of your Reviewer's Guide);
- ✓ Your interview schedule;
- ✓ Your computer with all of the current protocol sections already downloaded in your computer;
- ✓ Be sure you are able to access the records of the person you are reviewing;
- ✓ New Reviewers, you need to have access to the files for the person you are 'shadowing'.
- ✓ Extension cords if you have easy access to some;
- ✓ If your documents are on thumb drives as backs ups, please bring the thumb drive; and
- ✓ Any remaining questions you have or problems you have encountered as you have worked in your protocol and with your documents. (Please call Paula if you have any technical or document issues in advance of the classroom training so we have them resolved before Classroom Training Starts.)

## Day 1: Tuesday, January 30, 2018

**8:00 a.m. (We will begin promptly at 8:00 a.m.!)**

### I. WELCOME!

- Introductions
- Identifying issues and what you want to know before you leave
- Overview of review calendar

Lyn Rucker

**8:30 a.m.**

### II. REVIEW EXPECTATIONS AND SCHEDULE

- Review of "General Guidelines for Reviewers" - Reviewer's Guide Pages 7 - 8
- Review of Step 1 "Organize Your Tool Kit" - Reviewer's Guide Page 8
- Review of Step 2 "Thoroughly Review EACH Class Member's File" - Reviewer's Guide Pages 9 - 10
- Review of Step 3 "Phone Interviews" - Reviewer's Guide Pages 10 - 11
- Review of Step 4 "On-Site Interviews/Observations" - Reviewer's Guide Pages 11 - 12
- Review of Step 5 "Finishing the Review" - Reviewer's Guide Pages 12 - 13
- Professional Judgment - Reviewer's Guide Pages 4 - 6
- Reviewer Checklist - Reviewer's Guide Pages 15 - 17
- Reviewer and Case Judge Contact Information

Sandra Clamp

**8:45 a.m.**

### III. DOCUMENT LISTS

### IV. REVIEW OF CLASS MEMBER DOCUMENTS SENT FOR REVIEW Missing Documents

Teri Towe

Teri Towe

- You will reconcile what should be on the initial [Document Request Form](#) with your Case Judge by Wednesday before the onsite reviews begin.
- Via SComm, forward your Document Request Form (DRF) to the Regional Office, and copy your Case Judge and the Community Monitor's office (Lyn/Paula). Be sure to include the most current date in the footer so if you add more, the most current document can be identified. At the beginning of each review, specific regional office contacts will be provided to you.
- If more documents are identified as being needed after the initial request, add the additional documents you are requesting to your form, modify the date in the footer and resend it. [Sample completed Document Request Form](#)
- If you discover during an interview or onsite that an additional document is available that is needed, note that on the DRF with the name of the person you interviewed. If that person indicates they can forward the document, ask them to please forward it to the Regional Office so that the same chain is followed as all other documents. Circulate the DRF again, via SComm, with that information. If the person provides you a copy directly, be sure to share this document with Paula Bigham. In turn Paula will ensure the document is shared with DDSD to add to the DOH shared drive.
- Continue to complete the DRF throughout the review, noting when documents were received or if any were not.
- Tips:
  - Save your document frequently to prevent document loss
  - Check SCOMM (Therap) and Dropbox for additional documents from the region and ongoing communication with your Case Judge, Paula Bigham and Lyn Rucker.

### Practice Time

9:00 a.m.

#### V. Protocol #1: General Information and Record Review

##### General Information from Case Management and Provider Records

1. DEMOGRAPHICS/GENERAL INFORMATION/ACUITY
2. DIAGNOSIS TABLE
3. PROVIDER INFORMATION

Julie Vest  
Darlene Langkau  
Chris Thweatt

##### Note: Putting Information from the File into the Protocol

- If it is in the Individual's file it should be noted somewhere in the protocol.
- Group similar items together, such as medical assessments, therapy assessments, supported employment assessments, and so forth
- Don't limit the information
  - the rows expand as you type in them
  - add rows as needed
- If there is no specific place to put information in the protocol put it in #12 at the end of Section #1

9:15 a.m.

##### Documentation of Relevant Information

4. ASSESSMENTS TABLE
5. PROGRESS/REGRESSION
6. THERAPY/BSC/NUTRITION DOCUMENT REVIEW
  - e-CHAT
  - Provider Progress
  - Behavior
  - PT, OT

Wanda Black  
Charlene Cain  
Melanie Reeves Miller  
Tony Bright

### Practice Time

10:15 a.m. 15 Minute Break

10:30 a.m.

- 4. (CONTINUED) ASSESSMENTS TABLE
- 5. (CONTINUED) PROGRESS/REGRESSION
- 6. (CONTINUED) THERAPY/BSC/NUTRITION DOCUMENT REVIEW
  - SLP
  - Nutrition
  - ARST
  - Medical

Jamie Bailey  
Linda Pennington  
Carol Wilkin  
Darlene Langkau

**Practice Time**

11:30 a.m.

- 7. TEAM MEETINGS
- 8. CASE MANAGEMENT MONITORING

Susan Leonis  
Nicole Arsenault

**Practice Time**

12:00 p.m. Lunch (Provided In-House – Schlotsky's)

12:30 p.m. Protocol #1 Continued...

- 9. CARMP, HCPs, MERPs
  - CARMP/Meal Time Plan etc.
  - HCPs/MERPs
- 10. NURSING OVERSIGHT
- 11. EQUIPMENT TABLE
- 12. ISP TABLE
- 13. Additional Information

Jamie Bailey  
Darlene Langkau  
Darlene Langkau  
Jamie Bailey  
Wanda Black  
Sandra Clamp &  
Darlene Langkau

- |   |  |  |
|---|--|--|
| <ul style="list-style-type: none"> <li>• HRC</li> <li>• RORIs</li> <li>• Previous CPR Findings</li> <li>• Team Justification/DCF</li> <li>• Budget</li> </ul> | <ul style="list-style-type: none"> <li>• Daily Notes</li> <li>• Individual Transition Plan</li> <li>• Urgent Care</li> <li>• Hospitalization</li> <li>• OOH</li> </ul> | <ul style="list-style-type: none"> <li>• Incident Information Reports</li> <li>• Allergies</li> <li>• Weight Tracking</li> <li>• Seizure Tracking</li> <li>• Bowel Tracking</li> </ul> |
|---|--|--|

**Practice Time**

2:00 p.m. 15 Minute Break

2:15 p.m.

**VI. Protocol #2 Nurse/Therapy/BSC Interviews**

Note: Reviewer's Guide (Reviewer's Guide Step #3 Interviews Pages 7-9)

- 1. NURSING
- 2. PHYSICAL/OCCUPATIONAL THERAPY
- 3. SPEECH LANGUAGE PATHOLOGY
- 4. BEHAVIOR SUPPORT CONSULTANT

Sandra Clamp  
Darlene Langkau  
Tony Bright  
Jamie Bailey  
Melanie Reeves Miller

**Practice Time**

3:15 p.m.

**VII. Protocol #3 Case Management**

Nicole Arsenault

**Practice Time**

3:45 p.m. Wrap Up

Sandra Clamp & Lyn Rucker

4:15 p.m. Practice Time

## Day 2 – Thursday, Wednesday 31, 2018

8:00 a.m.

VIII. ANE INFORMATIONAL PRESENTATION

Jenny Bartos

9:00 a.m.

IX. SUPPORTED EMPLOYMENT/INFORMED CHOICE

Carrie Roberts

9:45 a.m.

X. CULTURAL SENSITIVITY TRAINING

Aiko Allen

10:30 a.m. 15 Minute Break

10:45 a.m.

XI. PROTOCOL #4 AND #5: DAY/EMPLOYMENT/RESIDENTIAL SERVICE PROVIDER

Day/Employment/Residential Interview

1. OBSERVATIONS
2. MEDICATIONS

Charlene Cain  
Charlene Cain  
Darlene Langkau

Practice Time

11:15 a.m.

XII. PROTOCOL #6: INDIVIDUAL & GUARDIAN INTERVIEWS

1. INDIVIDUAL'S INTERVIEW
2. GUARDIAN'S INTERVIEW

Nicole Arsenault

Practice Time

11:30 a.m.

XIII. PROTOCOL #7: SUMMARY

1. HEALTH (QUESTIONS 52-54)
2. ASSESSMENTS AND MEDICATIONS (QUESTIONS 55-59)

Darlene Langkau

Practice Time

11:45 a.m. Planning

3. ADEQUACY OF PLANNING/SERVICES (QUESTIONS 60-83)
4. ISP IMPLEMENTATION (QUESTIONS 84-88)

Wanda Black

Practice Time

12:30 p.m. Lunch (Provided In-House – Little Anita's)

1:00 p.m.

5. EXPECTATIONS FOR GROWTH (QUESTIONS 89-90)
6. QUALITY OF LIFE AND SATISFACTION (QUESTIONS 91-106)
7. TEAM PROCESS (QUESTIONS 107-118)
8. SUPPORTED EMPLOYMENT (QUESTIONS 119-138)

Sandra Clamp  
Sandra Clamp  
Carol Wilkin  
Lyn Rucker

Practice Time

2:30 p.m. 15 Minute Break

2:45 p.m.

- 9. BEHAVIOR (QUESTIONS 139-146)
- 10. ADAPTIVE EQUIPMENT/AUGMENTATIVE COMMUNICATION (QUESTIONS 147-150)
- 11. INDIVIDUAL SERVICE PLANNING (QUESTIONS 151-157)

Melanie Reeves Miller  
 Jamie Bailey  
 Wanda Black

Practice Time

3:15 p.m.

XIV. CASE JUDGING & FINDINGS AND RECOMMENDATIONS LETTER

Lyn Rucker &  
 Sandra Clamp

Practice Time

4:00 p.m.

XV. MENTORING PROCESS

Lyn Rucker

4:15 p.m.

XVI. SUMMATION/SCHEDULE/CLOSING

Lyn Rucker

- 1. REVIEWER SUMMATION
- 2. REGIONAL OFFICE SUMMATION MEETINGS
- 3. TEAM MEETINGS

**Don't forget to fill out the training evaluation – fold it in half – leave it in the box by the door...Thank You!**

**Presenters:** Please fill out the following 'grid' for each of the topics you are training as you did last year. This must be done in advance of your training so please send it to Lyn and Paula by no later than noon Central Time January 24<sup>th</sup>. Include as much detail as necessary for you, as a guide, and for others as reminders of what you covered.

Done	Topic/Information	Read	Hear	Practice	Example	Confirm
	Topic					