Monitoring PATH Programs

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Why Monitoring

• To gain “first hand” information and awareness

• To Influence PATH Program Effectiveness and Efficiency

• To Determine Compliance With:
  • Federal Guidelines
  • State Plan/Model
  • Intended Use Plan
  • Approved Budget
Develop A Monitoring Plan

• Monitoring Strategies include:
  • Hold Periodic Meetings
  • Administer Surveys
  • Conduct On-Site Visits
  • Review client Records
  • Review and Share Performance Data
  • Write an Annual Monitoring Report
Periodic Meetings

• Monthly or Quarterly
• 1 or More PATH Providers
• Share, Train, Network
• Review Guidelines and Expectations
• Answer Questions
• Builds a Network
Administer Surveys

PATH Monitoring Tool:

- Administer Annual Provider Survey to inquire about:
  - Staffing
  - Policies/Procedures
  - Services
  - Fiscal Management
  - Consumer Involvement
  - Training Needs

- Identify areas that need further discussion.
On-Site Visit

• Conduct on-site visit at least every 2 years
• Schedule in Advance
• Provide Site Visit Agenda that includes:
  • Activities
  • Amount of Time per Activity
  • Participants Involved per Activity
    • Provider Administrator
    • PATH Team Lead
    • PATH Team Members
On-Site Visit……..continued

• During on-site visit, meet with:
  • Team Lead
  • Direct Care Staff
  • Administrator
  • PATH Consumers (optional)
• Participate in Daily Routine
• Observe Actual Delivery of Service
• Provide Technical Assistance
Client Record Review

- Include as part of on-site visit
- Request Sample of Client Records
- Review Client Records For:
  - Eligibility Determination
  - Demographics
  - Needs Assessment & Treatment Planning
  - Documentation of Service Delivery
  - Discharge Summary (optional)
Performance Data

• Gather Actual Performance Data

• Review and compare *Actual* Performance Data with Proposed Performance Expectation:
  • Quantitative Data (How Many)
  • Qualitative Data (How Well)
Quality Improvement Planning

- Identify Areas that Meet Performance Expectations:
  - Accomplishment
  - Identify Preferred Practices

- Identify Areas that Do Not Meet Performance Expectations:
  - Area Needs Improvement
  - Identify Barriers
Annual Monitoring Report

• Develop a Brief Site Visit Report template that includes:
  • Monitoring Tool
  • Interviews with Administrator and Staff
  • Contract Performance
  • Consumer Focus Group (optional)
  • Clinical Record Review
  • Quality Improvement Recommendations

• Provide PATH Provider with copy of Annual Monitoring Report.