

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.