

Appendix 3
Quarterly Report
October 1 - December 31, 2003

Attachment 1
Training, Education, and Liaison
Contacts and meetings
Year Three – Quarter two
October - December 2003

Statewide or National Presentations		
Date	Description of Activity	Participants and Audience
November 11, 2003	SEAAMR Annual Conference-Update on Delmarva Activities in Florida	Linda Tupper presented to 40 members of SEAAMR
November 14, 2003	NASDDDS Quarterly Meeting – Alexandria, Virginia	Tim Jones participated in a panel discussion with First Health on QIO work in DD Quality Assurance initiatives
December 3, and 4, 2003	Quarterly IQC Meeting in Jacksonville	Quarterly presentations to IQC (30 people) including project update, status of new initiatives, and planning for change
December 9, 2003	DD Medical Case Management Teams Annual Meeting-Delmarva update, including the Upcoming Medication Review Initiative	Linda Tupper presented to 24 Participants

District/local contacts		
Date	Description of Activity	Participants and Audience
District 1		
October 31, 2003	Implementation Plan Training	Providers from District 1, District staff, Regional Manager and three QARs
November 17, 2003	Quarterly Meeting	Sharon Searcy,
District 2		
November 10, 2003	Quarterly Meeting	Lynne Daw, Sandra Rowe, Marion Olivier-Ruelas
District 3		
November 13, 2003	Waiver Support Coordinator Meeting	Christine Stevenson and Marion Olivier-Ruelas
November 13, 2003	Quarterly Meeting	Christine Stevenson, Marion Olivier-Ruelas and six District staff
District 4		
December 4, 2003	Quarterly Meeting	Sil Vazquez, Gary Baird, Anna Quintyne, Marion Olivier-Ruelas and nine District staff
District 7		
November 4, 2003	Quarterly Meeting	David Johnson, Michelle Levy, Wendy Benzell, Brenda McConnell, David Heindel, Carol McDuff Reviewed PCR/PPR trend data; discussed future training needs.

District/local contacts		
Date	Description of Activity	Participants and Audience
District 8		
October 16, 2003	Local Advocacy Committee	Presented overview of the FSQAP to about 8 members of the LAC.
October 27, 2003	Quarterly Meeting	Marcia Vollmar, Ed Ruley, Jeff Smith, Lydia Catalon, Carol McDuff Reviewed and discussed trends in data for PPR/PCR with emphasis on strategies to improve provider services in both review processes.
District 9		
October 7, 2003	Quarterly Meeting	Deb Blizzard, Joyce Burch, Laurie Gephardt, Rita Castor, Lydia Catalon, Carol Taylor, Carol McDuff. Reviewed and discussed trends in data for PPR/PCR. Discussed the desk review process.
December 11, 2003	Meeting with Steve Stoltz	Meeting with Steve and Carol McDuff to discuss trends and issues identified with some of the WSC's in Dist. 9.

District/local contacts		
Date	Description of Activity	Participants and Audience
District 10		
December 12, 2003	Family Care Council	Presented an overview of the FSQAP to @ 50 participants at the FCC meeting. This meeting also included some providers. Lydia Catalon, Avril Wilson, and Carol McDuff presented.
December 12, 2003	Quarterly Meeting	Meeting with Martha Keim, Lydia Catalon, Carol McDuff. Reviewed trends in the PCR/PPR process. Discussed possible training needs for the district.
District 11		
December 10, 2003	Quarterly Meeting	Austin Dean, Kirk Ryon, Lydia Catalon, Jose Navarro, Beth Townsend, Carol McDuff. Reviewed trends in PCR/PPR data. Discussed strengths and needs of providers; and possible training needs for the district.
District 12		
November 25, 2003	Quarterly Meeting	Sil Vazquez, Marion Olivier-Ruelas, and four District staff
December 8, 2003	Provider Meeting	Sil Vazquez, Marion Olivier-Ruelas, District staff and providers

District/local contacts		
Date	Description of Activity	Participants and Audience
District 13		
November 19, 2003	Quarterly Meeting	Christine Stevenson, Theresa Skidmore, Marion Olivier-Ruelas and three District staff
Region 14		
November 19, 2003	Quarterly Meeting	Kathleen, Ginger, Carla Charmaine, Marcia, and Bob
District 15		
December 11, 2003	Quarterly Meeting	Leopold Michel, Eileen Bradley, Charlie Gates, Kris Ziegler, Ron Delevan, Noeline Coore, Carol McDuff. Reviewed trends in PCR/PPR data. Discussed strategies to improve provider services; strengths and needs of providers; possible training needs.
Region 23		
November 19, 2003	Quarterly Meeting	Wanda, Dave, Marcia, Brenda, Bob, Kristin, and Barbara

Attachment 2
Quarterly Report
October 1 – December 31, 2003

Attachment 2
Florida Statewide Quality Assurance Program
Internal Quality Assurance Plan
Report on Year 3, Quarter 2
October - December 2003

The following provides a report of internal quality assurance activities that occurred during the October-December 2003 period.

New Staff Orientation and training

Claudia Kassack was hired as a part-time PPR in this quarter. Ms. Kassack was trained on the PPR procedures, tools, and general contract information. She observed reviews conducted by experienced reviewers, and conducted reviews in coordination with experienced reviewers. Anna Quintyne and Marion Olivier-Ruelas coordinated these training activities. Hector Rivera was hired in the position of PCR Verifier/Scheduler in November. Beyond general orientation to Delmarva, Mr. Rivera did not require additional training as he merely moved over from a temporary position in which he was performing the same duties. PPR QAR Sharon Moore changed from full-time to part-time status, and PCR QAR Chris Martin has not yet returned from her medical leave.

Person-centered Reviews

POM Monitoring and Annual Reliability

The Council provides on site monitoring of 5% of all POM's conducted annually. Council representatives accompany Reviewers on interviews and observe the administration of the POM's. Monitoring is designed to ensure that reliability in conducting the POM interviews is maintained as well as to provide ongoing technical assistance as needed. The Council monitored 36 interviews with existing staff this quarter. Additional coaching was provided for 1 reviewer and 11 reliability assessments were completed.

No reliability reviews were conducted for staff in the Children and Youth Assessment process.

Annual Gold Standard Reviews

100% of the person-centered review reports continued to be reviewed by the Regional Managers through the 2nd quarter and has replaced the use of scenarios until a sampling of reviews is implemented. Regional Manager review and approval of all reports continued to ensure accuracy and consistency in the identification and development of recommendations. The process of report review and approval includes individual follow up and consultation with the reviewer as well as periodic checks with selected waiver support coordinators to verify information and recommendations.

Consumer and Family Feedback

The AHCA Recipient Survey continues to be distributed to individuals participating in the Personal Outcome Measures interview portion of the PCR process. A summarized

report on this feedback is maintained by AHCA staff, and by all reports continues to be favorable. One education and training session was conducted during the quarter at the Family Care Council in District 10, providing an update on FSQAP activities.

Employee Performance Evaluations

Formal feedback was provided in November to JCR, Inc. employees involved in the FSQAP via the JCR, Inc. Performance Appraisal Summary. Performance feedback was obtained from multiple sources for each employee, and equitable evaluations were conducted. Information regarding employee strengths as well as areas requiring improvement was shared with each employee.

Provider Performance Reviews

Q & A document and protocol update

Biweekly conference calls were continued this quarter, with an education focus on element interpretation and questions surrounding the behavioral supplement. Minutes of these meetings were provided to all review staff and include Q&A's.

Scoring and documentation analysis

For the 2nd quarter, Regional Managers reviewed and approved 100% of the Provider Performance Reviews. Ongoing feedback was provided as necessary. Ongoing review by the Regional Managers provided a mechanism to ensure that reviewers were consistently interpreting elements and documenting justifications in an efficient and appropriate manner.

Rater reliability testing

Rater-reliability evaluations were not conducted this quarter for onsite or desk reviews. Onsite rater reliability activities are tentatively scheduled for the 3rd quarter, with desk review rater reliability slated for the 4th quarter.

Medical Peer Review

The Medical Director completed 14 quality assurance reviews of completed medical peer reviews. No issues or recommendations were noted.

Reconsiderations

11 reconsideration requests were processed during this quarter. One Regional Manager has assumed primary responsibility for this activity, though the PPR Coordinator completes some of the less involved reconsiderations.

Evaluation of Provider/consumer education

One formal education program was provided during the 2nd quarter. Implementation Plan training was conducted in District 1 for an array of providers. Individuals from large and small organizations participated in the training, with the majority of participants being involved in the development or use of IP's in their normal work activities. The training provided practical small group instruction, and was generally well received by the participants.

Timeliness and Submission of Deliverables

Delmarva and its program partners are continuing to develop internal management systems to ensure that required timelines for conducting reviews are being met and that review data is being gathered in a format that can be analyzed in an aggregate form. Delmarva has committed resources to pursue green belt status for 5 employees as part of Six Sigma. One of these individuals will be working with the Florida project to develop greater efficiencies, particularly relating to the development of the WiSCR's process.