

Ryan White Part A/MAI Outreach Record Review Tool

Agency Name: _____
 Outreach Worker: _____
 Date of Review: _____

CIS#: _____ Agency ID#: _____
 Reviewer: _____

Type of Referral: New to Care _____ Lost to Care _____
 Disposition: Linked _____ Not linked _____

SECTION I: REQUIRED DOCUMENTS:		YES	NO	NA	DATE	Comments
1	Is there a current RW Certified Referral, MD prescription or a Referral/Consent for Outreach Linkage to Care Form on file?					
2	Is there a current Composite Consent for Enrollment signed and dated by both outreach worker and client on file?					
3	Is there a current SDIS Authorization for the Release and Exchange of Information signed and dated by both outreach worker and client on file?					
4	Is there an Outreach Consent signed and dated by both outreach worker and client on file?					
5	Is there a signed Miami-Dade County Notice of Privacy Practices?					
Total Required Documents Score		0	0	0		
Percent Compliance Required Documents		#DIV/0!				
SECTION II: PICK UP/INITIAL CONTACT		YES	NO	NA	DATE	Comments
1	Referral Source and Date					
2	Referral Notification Date					
3	Was the Referral picked up within 24 hours of notification?					
4	Did outreach worker initiate attempt to contact the client within 48 hours of notification?					
Financial		0	0			
Percent Compliance		#DIV/0!				
SECTION III: OUTREACH NEW TO CARE SCREENS		YES	NO	NA	DATE	Comments
1	Was the "Register Client / C&T Incoming Referral" screen completed within 24 hours from date of pick up?					
2	If client referred from a C&T site, was the HIV Barcode number entered?					
3	Was the "Ryan White Eligibility" Screen completed in SDIS?					
4	Is there a completed New to Care Outreach Assessment on file?					
5	Did outreach worker complete the Barriers to Care in SDIS?					
6	Was an outreach referral generated to a RW Program Medical Case Management provider?					
7	Is there a copy of the referral in the file?					
8	Did outreach worker complete the "Intake scheduled for" field in the Final Disposition Screen in SDIS?					
9	Did outreach worker appropriately indicate whether the client has completed Intake?					
Financial		0	0	0		
Percent Compliance		#DIV/0!				
SECTION IV: OUTREACH LOST TO CARE SCREENS		YES	NO	NA	DATE	Comments
1	Did the outreach worker update basic client information and enter the lost to care referral information in SDIS within 24 hours of referral pick up?					
2	Is there a completed Lost to Care Outreach Assessment on file?					
3	Did outreach worker complete the Barriers to Care in SDIS?					
4	Was an outreach referral generated to a RW Program Medical Case Management provider?					
5	Is there a copy of the referral in the file?					
Financial		0	0	0		
Percent Compliance		#DIV/0!				

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SECTION V: FINAL DISPOSITION (New to Care and Lost to Care)		YES	NO	NA	DATE	Comments
1	Did outreach worker complete the "Case Mgmt Appt Scheduled for" field in the Final Disposition Screen in SDIS?					
2	Did outreach worker appropriately indicate whether the client has completed MCM appointment?					
3	Did outreach worker complete the "Out Pt Med Appt Scheduled for" field in the Final Disposition Screen in SDIS?					
4	Did outreach worker appropriately indicate whether the client has completed OMC appointment?					
5	Did outreach worker appropriately indicate whether the client was linked to care?					
6	If client has not been linked to care, was reason not linked to care completed?					
7	If client has been linked to care, did the outreach worker complete the 30 day follow up ?					
8	If client has been linked to care, did the outreach worker complete the 60 day follow up ?					
Financial		0	0	0		
Percent Compliance		#DIV/0!				
SECTION VI: PROGRESS NOTES		YES	NO	N/A	Comments	
1	Is there a detailed progress note dated to coincide with the completion of the Registration/Assessment date?					
2	Is appropriate and timely follow up documented?					
3	Did outreach worker document contact with referring agency to inform them if client is linked or not linked to care?					
4	Is there a case closure note on file as appropriate?					
Total:		0	0	0		
Percent Compliance Outreach Assessment / Progress Notes		#DIV/0!				

Final Score	YES	NO	N/A
Total:	0	0	0
Percentage:	#DIV/0!		