

Improving Reassessment Completion Rates



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BACKGROUND

HVCS provides case management to HIV+ clients in Westchester, Rockland and Putnam.

We use an Excel Tracker to manage reassessments (RAs), treatment adherence assessments and several other critical program functions.

The 2015 eShare quality indicator report revealed that on time RAs and treatment adherence assessments had dropped by more than 10% from the first to second review period.

Timely RAs ensure our clients receive needed services to improve health outcomes and indicate the attainment of our service obligations.

After a review of case loads and due dates, we discovered Treatment Adherence issues were a result of staff departure and had been resolved, so we focused on improving reassessments.

AIM

The project goal was to increase the number of on time reassessments to 90%.

CHALLENGES

- eShare Scheduling Services went offline during our PDSA. As a result, we manually reviewed dates.
- Our group clients are flagged as overdue when RAs are not required.

METHODS

Tasks/Activities	Who	How Measured?	Timeframe (by when?)
Generate RA eSHARE report	CQI/Database Manager	Report	3/14/2016
Analyze RA date and data entry	Senior Program Supervisor/MCM/CQI	Report	4/15/16
MCM QI team meet to discuss results	MCM QI team	Minutes	4/15/16
Schedule RAs for April, May, June	MCMs	Progress Notes	Monthly
Review tracker and update fields	Senior Program Supervisor/CQI	Tracker Updated	4/29/16
Complete RAs	MCMs	Assessment and notes in chart	5/31/16
Review RAs	Program Supervisors	Sign off reports	Monthly
Enter RAs into eSHARE	Program Assistants	Report	Prior to 4/30; 5/31; 6/30
Manual review of eSHARE reports	CQI/Database Manager	Report	6/30/16
Complete analysis/presentation	CQI	Report	7/25/16
Review results and next steps	MCM QI Team	Minutes	7/27/16

- We restored coding that was missing in our internal tracker to calculate due dates for some clients.
- The case tracker field using Excel's DAYS360 was updated with new color coding (green = 60 days out; yellow = 30 days out; red = overdue) to assist supervisors and staff in flagging upcoming due dates.
- Supervisors padded 'final' reassessment days by 7 days prior to the 180 day mark.
- Program assistants entered RAs into eShare instead of waiting for supervisory approval.
- We manually reviewed case tracker RAs with data in eShare.

RESULTS

- A review of case loads uncovered that staff turnover affected compliance rates in the second half of 2015 and beginning of 2016.
- During April – June there were 13 clients with very large overdue dates.
 - 7 were group clients
 - 4 were closed clients
 - 2 clients were not closed out
- Of the other open clients, 14 out of 15 reassessments were completed on time (93%).

Client #	SAMPLE April – June PDSA		May 2016
	Last RA	Next RA	RA due in days
Client 1	11/01/2015	04/29/2016	3
Client 2	12/02/2015	05/30/2016	-28
Client 3	12/28/ 2016	06/25/2016	-54

NEXT STEPS/LESSONS LEARNED

- Color coding and Excel maintenance improves staff ability to manage RAs in a timely manner.
- Direct data entry by Program Assistants improves compliance rates.
- Compliance rates are higher when our group clients are factored out of overdue.
- DAYS360 does not account for 31 day months, so some internal dates lag.