P384 Review
Lead Monitor Guidelines

Prior to the review			Day of the review	Following the review
60 – 45 days	**45 – 30 days**	**14 – 7 days**		**30 – 60 days**
❖ **Contact agency** ➢ notify of review date -or- negotiate alternate date ❖ **Contact IPI** ➢ coordinate with Medicaid review ❖ **Contact Licensing** ➢ coordinate with annual review ❖ **Select team members with RPM Mgr.**	❖ **Send letter to agency** ➢ see form letter ➢ confirm review date ➢ request QA information ❖ **Select, notify peer** ➢ agency chooses 3 from peer list ➢ monitor, RPM Mgr pick 1 of 3 ➢ if no peer response in 3 days, select another ❖ **Notify team members** ➢ date/time of review, assignments ➢ notify RPM Mgr. if member unavailable	❖ **QA Mgr receives QA information from agency** ❖ **Clarify expectations with agency** ➢ adequate space for file reviews ➢ agency coverage for staff during interviews ➢ private space for interviews ❖ **Email reminder to team** ➢ give review date, time, directions, other relevant information ❖ **Obtain UIR information from QA** ❖ **Select youth for review** ➢ 15% of all youth, or minimum of 4 ❖ **Develop schedule for day of review** ❖ **Copy documents for team members for day of review** ➢ P384 ➢ P384 file review tool ➢ P384 questionnaires for clients, direct service staff	❖ **Finalize review day schedule** ➢ identify scheduled staff for interviews ➢ notify agency of youth for review (NOTE: no youth to be removed from school) ❖ **Facilitate introductory meeting** ➢ keep it brief! ➢ introduce participants ➢ distribute review schedule ➢ answer agency questions ❖ **Receive file orientation** ➢ keep it brief! ❖ **Receive facility tour** ➢ keep it brief! ❖ **Complete file reviews/interviews** ❖ **Process preliminary findings with team members** ❖ **Present preliminary findings to agency administration** ➢ Lead Monitor, RPM Mgr., QA Mgr. only	❖ **Complete draft review report with recommendations** ➢ send draft interview section to interviewers (give 1 week for feedback) ➢ send draft file review section to file reviewers (give 1 week for feedback) ➢ send draft report to L. Karfs by 30th day after review ❖ **QA completes draft QA portion of review report with recommendations** ❖ **Review draft reports with L. Karfs, QA Mgr.** ❖ **Consolidate QA portion into overall report** ❖ **L. Karfs approves, forwards completed P384 report to N. Brown and agency**