

Connectivity/Service Coordination	Points
<p>1. When conducting an initial biopsychosocial assessment, do Case Managers consult the following professionals (when applicable to the specific client)? (check all that apply)</p> <p> <input type="checkbox"/> Primary Care Physician <input type="checkbox"/> Substance Abuse Professional <input type="checkbox"/> Infectious Disease Specialist <input type="checkbox"/> Criminal Justice Professional (i.e. Probation Officer) <input type="checkbox"/> Mental Health Professional <input type="checkbox"/> Family members, partners </p>	<p>Add one (1) point for each checked answer.</p> <p style="text-align: right;">_____Points</p>
<p>2. Do Case Managers participate in multi-disciplinary case conferences with the professionals involved in the client's care? (choose one)</p> <p> <input type="checkbox"/> Every client is reviewed in a multi-disciplinary case conference periodically (2 points) <input type="checkbox"/> Clients are reviewed in a multi-disciplinary case conference when case manager believes there might be a problem (1 point) <input type="checkbox"/> Multi-disciplinary case conferences are not conducted (0 points) </p>	<p style="text-align: right;">_____Points</p>
<p>3. Communication necessary for the coordination of services occurs on a regular basis between all professionals involved in the client's care. (circle one)</p> <p> <input type="checkbox"/> Strongly Agree (3 points) <input type="checkbox"/> Agree (2 points) <input type="checkbox"/> Moderately Agree (1 point) <input type="checkbox"/> Disagree (0 points) </p>	<p style="text-align: right;">_____Points</p>
<p>4. Services in the continuum of care are seamless (implemented in a coordinated method). (circle one)</p> <p> <input type="checkbox"/> Strongly Agree (3 points) <input type="checkbox"/> Agree (2 points) <input type="checkbox"/> Moderately Agree (1 point) <input type="checkbox"/> Disagree (0 points) </p>	<p style="text-align: right;">_____Points</p>
Connectivity/Service Coordination Total Score:	

Acuity Assessment/Service Utilization Management	Points
<p>5. Does the Case Management provider/system... (check all that apply)</p> <p> <input type="checkbox"/> Use a standardized acuity assessment? <input type="checkbox"/> Utilize established methodologies for determining when a client no longer needs Case Management services? <input type="checkbox"/> Establish a level of acuity for each client? <input type="checkbox"/> Complete periodic reassessments of each client's acuity? <input type="checkbox"/> Utilize specialized Case Management to meet the needs of specific populations (Incarcerated, Mentally Ill, Substance Users, Critically Ill, etc.)? <input type="checkbox"/> Use acuity scores to determine the intensity of services to be provided (number of contacts per time period, service planning, staffing, etc.)? </p>	<p>Add one (1) point for each checked answer.</p> <p style="text-align: right;">_____Points</p>
Acuity Assessment/Service Utilization Management Total Score:	

Health Literacy	Points
<p>6. Does the Case Management provider/system...(check all that apply)</p> <p> <input type="checkbox"/> Utilize a standardized methodology for assessing a client's health literacy. <input type="checkbox"/> Provide formal training for case managers on how to assess health literacy. </p>	<p>Add two (2) points for each checked answer.</p> <p style="text-align: right;">_____Points</p>
<p>7. How often does the Case Management provider/system assess health literacy? (choose one)</p> <p> <input type="checkbox"/> Every client is assessed and reassessed periodically= 2 points <input type="checkbox"/> Assessed when case manager believes there might be a problem= 1 point <input type="checkbox"/> Health literacy is not assessed=0 points </p>	<p style="text-align: right;">_____Points</p>

Health Literacy Total Score:	
Adherence	Points
<p>8. Does the Case Management provider/system...(check all that apply)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Have a standardized methodology for assessing a client’s adherence to medications, medical and other treatments (i.e. mental health, substance abuse or oral health)? <input type="checkbox"/> Provide formal training for case mangers on how to assess adherence to medication, medical and other treatments? <input type="checkbox"/> Have a standardized methodology to communicate adherence issues and strategies with the medical providers? 	<p><i>Add two (2) points for each checked answer.</i></p> <p>_____ Points</p>
<p>9. How often does the Case Management provider/system assess adherence to medication, medical and other treatments (i.e. mental health, substance abuse or oral health)? (choose one)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Every client is assessed and reassessed periodically (2 points) <input type="checkbox"/> Assessed when case manager believes there might be a problem (1 points) <input type="checkbox"/> Adherence is not assessed (0 points) 	<p>_____ Points</p>
Adherence Total Score	

Training	Points		
<p>10. Does the Case Management provider/system require a minimum level of education and/or years of experience to be hired as a Case Manager?</p> <p>Yes =(10 points) No (0 points)</p>	<p>_____ Points</p>		
<p>11. Has the Case Management provider/system provided training in the following subject areas? (check all that apply)</p> <table style="width: 100%; border: none;"> <tr> <td style="vertical-align: top; width: 50%;"> <ul style="list-style-type: none"> <input type="checkbox"/> Race and Culture <input type="checkbox"/> Sexual Orientation <input type="checkbox"/> Transgender Issues <input type="checkbox"/> Working with clients experiencing poverty, homelessness, criminal justice involvement, sex workers, and other marginal populations <input type="checkbox"/> Overview of Ryan White Programs in your area <input type="checkbox"/> Ryan White Standards of Care <input type="checkbox"/> Ethics and Boundaries <input type="checkbox"/> Confidentiality/HIPAA <input type="checkbox"/> Public benefit programs <input type="checkbox"/> Linkage to medical care and medical insurance <input type="checkbox"/> Housing resources, HOPWA <input type="checkbox"/> Immigration issues <input type="checkbox"/> Criminal justice systems <input type="checkbox"/> Teaching/supporting medical self management </td> <td style="vertical-align: top; width: 50%;"> <ul style="list-style-type: none"> <input type="checkbox"/> Teaching/supporting health literacy <input type="checkbox"/> HIV stigma and discrimination <input type="checkbox"/> Fundamental counseling skills <input type="checkbox"/> Motivational Interviewing <input type="checkbox"/> Assessment Skills <input type="checkbox"/> Documentation/Treatment Planning <input type="checkbox"/> Managing conflict, escalation and difficult clients <input type="checkbox"/> Secondary trauma <input type="checkbox"/> Burnout <input type="checkbox"/> Understanding HIV and substance abuse <input type="checkbox"/> Understanding HIV and mental health <input type="checkbox"/> Strategies for working with clients with co-occurring mental health and/or substance abuse issues <p>Add Medical knowledge trainings?</p> <ul style="list-style-type: none"> <input type="checkbox"/> HIV knowledge (disease progression, immune system function, CD4 and VL testing) <input type="checkbox"/> HIV Prevention <input type="checkbox"/> HIV Treatment <input type="checkbox"/> Co-Morbidities, Opportunistic Infections </td> </tr> </table>	<ul style="list-style-type: none"> <input type="checkbox"/> Race and Culture <input type="checkbox"/> Sexual Orientation <input type="checkbox"/> Transgender Issues <input type="checkbox"/> Working with clients experiencing poverty, homelessness, criminal justice involvement, sex workers, and other marginal populations <input type="checkbox"/> Overview of Ryan White Programs in your area <input type="checkbox"/> Ryan White Standards of Care <input type="checkbox"/> Ethics and Boundaries <input type="checkbox"/> Confidentiality/HIPAA <input type="checkbox"/> Public benefit programs <input type="checkbox"/> Linkage to medical care and medical insurance <input type="checkbox"/> Housing resources, HOPWA <input type="checkbox"/> Immigration issues <input type="checkbox"/> Criminal justice systems <input type="checkbox"/> Teaching/supporting medical self management 	<ul style="list-style-type: none"> <input type="checkbox"/> Teaching/supporting health literacy <input type="checkbox"/> HIV stigma and discrimination <input type="checkbox"/> Fundamental counseling skills <input type="checkbox"/> Motivational Interviewing <input type="checkbox"/> Assessment Skills <input type="checkbox"/> Documentation/Treatment Planning <input type="checkbox"/> Managing conflict, escalation and difficult clients <input type="checkbox"/> Secondary trauma <input type="checkbox"/> Burnout <input type="checkbox"/> Understanding HIV and substance abuse <input type="checkbox"/> Understanding HIV and mental health <input type="checkbox"/> Strategies for working with clients with co-occurring mental health and/or substance abuse issues <p>Add Medical knowledge trainings?</p> <ul style="list-style-type: none"> <input type="checkbox"/> HIV knowledge (disease progression, immune system function, CD4 and VL testing) <input type="checkbox"/> HIV Prevention <input type="checkbox"/> HIV Treatment <input type="checkbox"/> Co-Morbidities, Opportunistic Infections 	<p><i>Add two (2) points for each checked answer.</i></p> <p>_____ Points</p>
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Training Total Score:			

Supervision/Oversight	Points
<p>12. Does the Case Management provider/system provide clinical supervision from a master’s level (or equivalent) clinician? How often? (choose one)</p> <p><input type="checkbox"/> Once a week (5 points)</p> <p><input type="checkbox"/> Once every two weeks (4 points)</p> <p><input type="checkbox"/> Once a month (3 points)</p> <p><input type="checkbox"/> Once every six months (2 points)</p> <p><input type="checkbox"/> Only when a case warrants consultation (1 points)</p> <p><input type="checkbox"/> Never (0 points)</p>	<p>_____Points</p>
<p>13. Does the Case Management provider/system ...</p> <p><input type="checkbox"/> Utilize measurable Standards of Care?</p> <p><input type="checkbox"/> Utilize site visit/monitoring visits by subject are experts to measure compliance with the Standards of Care?</p> <p><input type="checkbox"/> Utilized performance measures or Quality Measures to track provider and system-wide progress over time?</p> <p><input type="checkbox"/> Utilize quality improvement processes to test and implement change?</p>	<p><i>Add two (2) points for each checked answer</i></p> <p>_____Points</p>
Supervision/Oversight Total Score	

Direction for quality improvement efforts.

Circle the point range based on your scores for each assessment area above.

Case Management Assessment Area	High Functioning	Some Focus Needed	Improvement Effort Recommended
Connectivity/Service Coordination Score	11-14	8-10	0-7
Acuity Assessment Score	4-6	3	0-2
Health Literacy Score	4-6	3	0-2
Adherence Score	6-8	4-5	0-3
Training Score	30-40	20-29	0-19
Supervision/Oversight Score	10-13	7-9	0-6

Next Steps: Place a check in the each of the columns that apply. The assessment areas with the most check marks are good possibilities for your next improvement project.

Case Management Assessment Area	Requires improvement	Can be easily improved or enhanced	The most relevant to your specific Case Management System	Can have the most impact on the quality of your services
Connectivity/Coordination				
Acuity Assessment				
Health Literacy				
Adherence				
Training				
Supervision/Oversight				