

**RYAN WHITE PART B PEER REVIEW**  
**Virginia Department of Health**  
**Division of Disease Prevention**  
**HIV Care Services**  
**Chart Review**  
**Medical Case Management**

Client ID \_\_\_\_\_

Service Standard	Question	YES	NO	NA	COMMENTS
<b>Newly Enrolled Clients (within previous 12 months)</b>					
2.1	1. Was the initial MCM Assessment completed within 30 days of (NMCM) intake?				
<b>Newly Enrolled and Ongoing Clients</b>					
<b>MCM Assessment</b>					
2.1	2. Was at least one face-to-face Assessment completed with the client?				
2.2	3. Does the last page of the MCM Assessment include a summary of findings?				
2.3	4. Does the MCM Assessment include an assessment of Treatment Adherence?				
2.3	5. If Treatment Adherence was identified as a need in the MCM Assessment, is it included in the Service Plan?				
<b>Acuity Scale</b>					
3.1	6. Does the client have an Acuity Scale completed and documented reflecting their current Acuity level?				

3.2	7. Has the client's acuity level been updated as frequently as indicated in each Acuity level according to level 1, 2, or 3?				
	8. Is there documentation that clients with Acuity level 1 have been referred back to NMCM?				
<b>Service Planning</b>					
4.1	9. Is there documentation of a completed and dated MCM Service Plan (except for Acuity Scores of 15 or less) within 45 calendar days of MCM Assessment?				
4.1	10. If the Service Plan was not completed within 45 days of the MCM Assessment, is there documentation that explains the delay in the progress notes?				
4.2	11. Is there documentation that reflects that client was included in the development in the MCM Service Plan?				
4.2	12. Is there documentation that client was offered or received a copy of the Service Plan?				
<b>Service Plan Implementation</b>					
5.1	13. Are the goals and progress on attaining goals documented in the progress notes? (Levels 2 & 3)				
5.1	14. Is the timeline for goals set within the appropriate time frame for the acuity level?				
5.2	15. Is the Service Plan completed and updated within the appropriate timeframe according to the client's acuity level?				
5.3	16. Does the Service Plan or progress notes contain ongoing documentation of activities toward the completion of goals?				
<b>Discharge or Transfer</b>					
6.1	17. Is there a discharge summary with all the reason(s) for discharge in the client file?				

6.1	18. Was the discharge summary placed in the client's file within 30 days of discharge from MCM or the agency?				
6.2	19. If the client transferred to another MCM subrecipient, were MCM services transferred to new subrecipient within 5 business days of request?				
6.3	20. If the client could not be located, is there documentation of a minimum of 3 follow-up attempts over a 3-month period after first attempt?				
6.3	21. Is there documentation that a certified letter was mailed to the client's last known mailing address within five business after the last phone attempt notifying the client of pending inactivation?				
6.4	22. Is there documentation that a certified letter was mailed to the client's last known mailing address within five business days of discharge, noting the reason for discharge and possible alternative resources.				

Reviewer: \_\_\_\_\_ Date: \_\_\_\_\_

Provider Staff(s) interviewed: \_\_\_\_\_