

# ATTACHMENT B



## FY2017 Ryan White Part A Monitoring Site Visit Check List

### Program Monitoring

**Please have the following program information available on the first day of the site visit**

1. Consumer Advisory Board membership list, meeting notices, and meeting minutes.
2. Client satisfaction survey tools, analysis and documented use of results.
3. Agency's Grievance Policy and Procedure
4. File of all Ryan White clients who were refused services, with the reason for refusal specified.
5. File of all formal client complaints received, grievances filed, and follow-up outcomes.
6. Copy of eligibility policies, including agency policies that do not permit denial of service due to pre-existing or present health conditions and that do not consider VA health benefits as primary health coverage for the purposes of Ryan White.
7. Documentation that all staff involved in eligibility determination are properly trained.
8. Informational materials about agency services, newsletters, and promotional materials.
9. Documentation of agency Corporate Compliance Plan in providing Medicare or Medicaid reimbursable services.
10. Agency personnel policy handbook and/or manual.
11. Agency code of ethics and conflict of interest policies.
12. Documentation of any employee or board member violations of Code of Ethics policy.
13. Progress report(s) on previously established corrective action plans or PDSA initiatives.
14. Documentation of established linkage agreements with key points of entry into the Ryan White system of care.
15. Documentation that a referral tracking system is in place for key points of entry into the Ryan White system of care.
16. Copies of staff resumes, certifications, and licensures where required. (please see Program Services Tool for details on requirements per service category)

**Service category specific program requirements are outlined in the Program Services Tool. In addition to the items listed above, please make sure to review and prepare all service category requirements and have them available for review on the first day of your scheduled visit.**

**<http://www.ccbh.net/ryan-white-provider-resources>**