



## IPMG Quality Assurance Plan

IPMG recognizes the importance of having a Quality Assurance Plan to address the quality of documentation entered. IPMG strives to follow the guidelines and policies set out by the State of Indiana and therefore has put the following plan into place.

IPMG has developed CM expectations based off the States policies and guidelines for documentation. These CM expectations include but are not limited to the following:

- Case Note entry
- Monitoring Checklist entry and completion
- CCBs
- PCISP
- IRs
- LOCSI
- BMRs
- BRQs
- Critical Events
- Transitions

Case Managers are trained on the CM expectations and utilize these when completing the required documentation.

Based on the CM expectations, IPMG developed Review Templates for consistency among quality reviewers. Templates are utilized for the following by reviewers:

- Case Note entry
- Monitoring Checklist entry and completion
- CCBs
- PCISP
- IRs
- LOCSI
- BMRs
- BRQs
- Critical Events
- Transitions

Documentation is chosen randomly for quality evaluation and the review is entered into the IPMG Coaching app. The frequency of documentation review is based on the Case Manager's competency level. The review frequency also corresponds to the frequency of a coaching call with the Case Manager's Supervisor. The current review levels are: Quarterly, Bi-Monthly and Monthly. When exiting training, new Case Managers have all quality reviews completed on a monthly basis and the results are discussed on a monthly call with their Supervisor. As a Case Manager demonstrates the ability to consistently meet quality expectations, Case Managers can progress to less frequent reviews and

coaching calls with their supervisor. IPMG has developed a Template to confirm that a Case Manager is ready to move to less frequent reviews. Once a CM has met the set criteria outlined on the template for Supervisors, Supervisors send the completed template to their Assistant Director for review, who will then approve the change.

Coaching calls are held with CMs based on their frequency. Coaching calls consist of 1:1 time with the CM and their supervisor. This time is utilized to go over reviews that have been done in the timeframe, offer tips, suggestions, and constructive feedback regarding a CMs work. The CM and Supervisor also utilize this time to discuss any issues the CM is currently experiencing.

### **Coaching Call and Review Information for Case Managers in Training**

The following is the review and coaching call information for Case Managers in training. A Training Supervisor Processes Manual was developed and contains information for the Training Supervisor regarding quality reviews, CM Performance calls, shadowing opportunities and more.

Training Supervisors complete coaching performance calls at 30, 60 and 90 days for all CMs going through the training program. The training supervisor includes information on where the CM is at compared with their time in the position, and offers suggestions, tips and makes recommendations to the CM based on their performance. CMs are encouraged to be open with their Training Supervisor and discuss their comfort level with tasks that they have received training on.

Case Managers in training are given the expectations and are trained on the expectations for each task as part of their training. Training Supervisors and the Case Management Specialist complete reviews of the following based off the templates that were developed.

- Case Note entry
- Monitoring Checklist entry and completion
- CCBs
- PCISP
- IRs
- LOCSI
- BMRs
- BRQs
- Critical Events
- Transitions

Supplemental trainings are provided to each Case Manager in training for each of the topics listed above. Supplemental trainings are done with the training supervisors. Training Supervisors also will hold 1:1 calls with their CMs at a higher frequency during the CM's first 60 days.

### **Other information**

Annual evaluations are completed with all IPMG Staff on an annual basis. Annual evals should include pertinent information to their positions, specific information on the past years performance, highs and lows, including constructive feedback.

IPMG has developed an AD manual, ICC manual, Supervisor manual, and Training Supervisor manual for these positions. These manuals lay out the processes and requirements of each of the positions.