

Building Connections between the Record Review Process and Meaningful Outcomes

Key Steps to Take

Step #1: Assess where you are with program climate and culture before deciding to make changes to any part of your CQI process.

- The approach you take will depend on where the program is.
- To be effective you may need to “pace” your initiatives.

Step #2: Assess your capacity.

- Do you have the right people with the right knowledge?

Step #3: Look at your current record review tools and notate which questions are more compliance focused and which are quality focused.

Step #4: Determine whether your record review tool has questions that refer to or relate to any of the outcomes you track for the program.

- If not, what elements should you see in the client file that relate to positive outcomes?
- When you read a client file, can you tell whether that client will have positive outcomes or negative outcomes? What would need to happen to change that trajectory for that client?
- Start developing those questions and add them to your tools.

Step #5: After revising your record review tool to focus on client outcomes, look to see if the outcomes being reported align with the record review data.

- If they do, great. You should now have data that supports the importance of the record review process and how it supports outcomes.
- If they don't then dig into why (Step #6).

Step #6: Develop the Action Plan to resolve any disconnect that there may be between outcomes and what is being seen in client files during record reviews.

- Do staff need booster training on the standardized assessment tools they are using?
- Does a more formalized Guidance Tool/Procedure need to be created beyond the manual for an assessment tool?
- Are you looking at the right outcomes?

4) After seeing today's presentation, what types of questions would you want to add to your record review tools that are related to outcomes?

5) Identify any barriers that would make this challenging. What would you need to do to address these barriers?