

NWX-OS-OGC-RKVL

Moderator: Nancy Mautone-Smith
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Coordinator: Good afternoon and thank you all for standing by. I'd like to inform all participants that your lines have been placed on a listen-only mode until the question and answer session of today's conference. Today's call is also being recorded. If anyone has any objections you may disconnect at this time. I would now like to turn the call over to Ms. Sue Moskosky. Thank you. You may begin.

Sue Moskosky: Thank you Sue and thank you all for joining us this afternoon for this Webinar on the Title X Program Review Tool. We are happy that you all have joined us and we want this to be as interactive as possible. But I'm going to turn it over first of all to Nancy Mautone-Smith who is going to run through some slides on the review tool. And then after that has been completed we will actually ask you all to give us whatever questions that you have on the tool and we'll attempt to answer those.

I know that we're really excited that this program review tool has been a long time coming and it's finally rolled out. We know that it's not completely perfect but we are in the process of making some revisions as a result of some of the program reviews that have happened this summer and over the last

several months. So hopefully you all have found it to be a valuable experience and the feedback you've gotten has been helpful to you in approving your programs. So with that I'm going to turn it over to Nancy.

Nancy Mautone-Smith: Thank you Sue and good afternoon everyone. Today we'll be doing a few things. We're going to talk briefly about the purpose of the program review and a little bit about the process that we've developed over the past year and in the recent months. We'll also touch briefly on the revision process that's been underway. And I'll talk then a little bit about the one to three year plan for the rollout of the new tool and then a little bit more about the five-year vision of where we hope to bring this process. And then as Sue said we will address any questions that you all have.

Just to review the purpose of the program review tool is to help monitor compliance with Title X statute regulations and policies. We also use the program review tool and process to assess the quality of services being provided within your Title X programs. And of course this is a great opportunity for you to receive technical assistance and for the federal office staff to provide that assistance to you on site.

So next we'll discuss a few points about the program review process. Conducting a program review is a primary role for the regional federal staff. They serve as the team lead for the other consultants which include a fiscal consultant, an administrative consultant and a clinical consultant. And sometimes they may actually conduct a portion of the reviews themselves. And during a program review the review team visits the grantee and typically one to two service sites.

The on-site portion of the review typically lasts about four to five days. Consultants then provide their written reports to the regional office staff who

then can file them - compile them into a final summary report that is reviewed by the Office of Population Affairs staff. This report then makes its way to you the grantee along with the Office of Grants Management and if stipulated in the report the grantee then will submit a corrective action plan within a specified period of time. The regional office staff then monitor the progress that the grantees make on any corrections and provide technical assistance if needed. Ultimately any corrective action plans should be accepted and closed out with no pending items in need of correction.

This is a snapshot of the previous tool that I'm sure you're very familiar with and this was based on the 2001 Title X guidelines. And as you can see the method that we used here was very open ended and it left a lot of room for interpretation both by the federal staff and both by the consultants as well. And as you can see this is an excerpt that has to do with voluntary participation. And you could see the M there would stand for must the C up at the top for compliance and the NC for noncompliance.

So as you can see if you were being assessed for compliance with voluntary services there was really nothing that you could point to to prepare for what would be evidence of being in compliance with that element. So obviously this led to a lot of challenges. In many instances this tool did not align directly with regulations. We also had three separate tools one for administrative, one for clinical and one for financial. As you can expect given that we didn't clearly define what elements would indicate compliance we had inconsistent opinions both from federal project officer staff and from consultants on what compliance would look like. So there was a wide degree of variation across the country.

Additionally there was no standard format for reports so in one particular state you might receive a report written one way somewhere else it might be

completely different. Also no timeline that was standardized for the reports to be submitted to you the grantees or for you to get your corrections back. And very importantly we really didn't have any measure of the quality of services that were being provided.

In 2014 as you all know we released new guidelines for Title X services projects. And these guidelines unlike the ones we had 2001 consists of two pieces the program requirements and the QFP which you're all familiar with now. The program requirements provide a concise explanation of the general statutory, regulatory and policy requirements that can be used to help applicants prepare a Title X grant application as well as to monitor your projects for compliance with Title X requirements. And by monitor I mean that federal staff and grantee staff should use these documents to assess grantees and sub recipients for which you have oversight and also to use them to assess your entire service network.

So clearly when the guidelines were revised in 2014 they were completely different both in the content and the format. So the content of the program requirements then tracked much more closely to the regulations and the statute than our previous 2001 guidelines. And QFP for the first time provide recommendations on how providers should provide quality care in accordance with the best available evidence. So therefore there was really a need to revamp the monitoring process to coincide with these new documents and in some cases new expectations.

Our new program review tool and process provides more clarity and in many cases more flexibility for grantees to meet requirements. It describes the implementation strategies and the evidence of compliance. It also includes a quality assessment and links the program requirements to key sections in QFP. In terms of the process OPA is really working hard to streamline the process

by developing review schedules for the entire year in advance working with the regional office staff and the grantees to do so. And developing and improving consultant teams who will go out together over the course of the year. We're also finalizing templates standardized for introduction letters for the report format and for the entrance and exit conferences that go on at the end and the beginning of the program review process.

We're also in the process of finalizing a new standard operating procedure that will include succinct timelines for both the planning and the conducting of the program review process and also for the completion of any reports and corrective action plans with the hope of getting things back to you the grantee in a much quicker time frame and resolving any discrepancies that may exist much quicker. The expected result of all of this is that program reviews will be conducted much more consistently and really much more equitably across all of the different regional offices.

So here's a snapshot of the new program review tool. And you can see it's a little bit different. And now we have the same regulation listed here on the left that pertains to voluntary participation but as you can see in the middle column we've outlined an implementation strategy along with the evidence that the consultants will be looking at to demonstrate compliance. And you can see in that right-hand column that there's a clickable box either met or not met. And it's important to note that compliance items are requirements so any element that receives a not met will require the grantee to propose a corrective action.

So next we looked at how should we assess quality. Now this is also new but it's probably very familiar to you at this point. It's a visual representation of the QFP assessment that's contained within the tool. So grantees who do not meet any of the indicators outlined in the tool will receive an assessment of

needing development, and that's the red bar but you see there. And now it's important here to distinguish that the QFP is assessment is really just that it's an assessment of quality. The assessment here does not carry the same weight in terms of any adverse actions as noncompliance with program requirements.

So at the end of the review grantees will receive an overall report card that includes a compliance rating that is how you are doing on the compliance with the statutory and regulatory requirements along with the QFP assessment which is an assessment of some of the quality indicators contained within QFP. Now here's a snapshot of what one of the QFP assessments looks like in the program review tool. So you can see that we've identified here the link between the program requirements and the QFP. And in this case the assessment is linked to the program requirement that pertains to competent and efficient administration of the project and really looks at how to provide quality care. So it's looking here in this particular example at a few things including your data and such.

So you will based on however many and there are some more in this particular page but I couldn't fit them on the page. Based on how many of these elements have been implemented you'll get that quality assessment score which you can see up in the upper right-hand corner so zero would be the development all the way up to doing above and beyond all six which would earn a highly developed assessment.

In terms of the one to three year rollout plan the regional private offices as you know are using the tool now and have been for this summer. We conducted training for federal staff back in March. Of course we're doing the Webinar today here in July. Within the next couple of weeks we expect the tool to go into an online system of course we'll be leading everyone know when that occurs. It's pretty much going to look very similar to what the paper

tool looks like but it will be a little bit more streamlined and easier for consultants and staff to use.

And then we'll be taking feedback that comes as this tool continues to be used in electronic format into the fall of 2016 and probably look at making some additional revisions after the program reviews are completed using the online system. We will then be looking at the enhanced functionality of the webTA system that's a system that's used right now to request consultants for program reviews and to handle logistics. It's going to be handling the program review tool which eventually we hope to develop into a workflow management system which I'll talk a little bit more about in the next slide.

For the five-year vision we expect to further streamline the review process to get results out to you faster and more clearly. We're also going to be working on the electronic system. And this includes creating more of a workflow management system similar but not exactly the same to what you might be familiar with, with grant solutions in that you will be able to download copies of your report, upload corrective action plans, view comments from the regional federal office staff and then also be able to look at trends of your project over time as this gets populated, you know, over the course of many years with program reviews that you have had.

And this is really going to help we think on a variety of levels. We expect that this will enable us at the central office and also in the regional offices to look at needs both across the region and across the country because we will have the enhanced functionality to be able to look at compliance items and quality across the country to really see where there may be need for additional technical assistance or just additional support. We will also be updating the tool when we have new guidelines which are underway and we hope to have a new iteration of that sometime in 2017. The ultimate goal here of course is to

have the monitoring process, the review tools, technical assistance and training really be adaptable and complementary to all of the work areas across OPA and the Title X program.

So just as a review these are the things that we've talked about today. And after that brief review we'd like to invite any questions that you might have for Sue or for me. And operator we're ready to answer questions. We'll be checking the Q&A pod and also the phone.

Sue Moskosky: Well let me just -- this is Sue -- so let me just chime in as you all are queuing up your questions either verbally or in the chat pod but I just wanted to correct one thing...

Nancy Mautone-Smith: Oh thank you.

Sue Moskosky: ...and that is the program guidelines. We're - we are in the revision process as Nancy said but it's more likely I think right now we're projecting that they would be released late 2018...

Nancy Mautone-Smith: Okay.

Sue Moskosky: ...or early 2019.

Nancy Mautone-Smith: Thank you for that correction.

Sue Moskosky: So please don't count on 2017 having -- we're right in the middle of conducting additional systematic reviews. They'll be some more systematic reviews this next year and then all the writing will begin. So it's going to be late 2018 or beginning of 2019. So...

Nancy Mautone-Smith: Oh thank you Sue. We will correct...

Sue Moskosky: Yes.

Nancy Mautone-Smith: ...that slide before posting.

Sue Moskosky: Yes. So don't want everybody to get all upset that we're going to be changing everything so soon but we will be doing the occasional updates in between just as we've done before. So...

Nancy Mautone-Smith: Well thank you that helps answer one of the first questions in the chat pod which is will the slides be available after the Webinar? And the answer is yes.

Sue Moskosky: But new improved slides.

Nancy Mautone-Smith: But new improved - I will correct that error and yes they will be available along with a recording on the OPA Web sites within the next two weeks. All right we have one more in the chat pot - chat pod here. And the question is, are grantees expected to use the same tool when we do site visits with our sub recipients? Is it required?

Sue Moskosky: So I will be happy to answer that question. This is Sue. So no you are not - we cannot require you to use the same tool that we used. You're free to use it if you would like. We think it's a good tool. And it's, you know, definitely something you can do. But we do expect that you're reviewing your sites on a regular basis and that you're reviewing them for the same types of things that we review you for. However we know that a lot of you already have your own review tools and as long as those tools are thorough and include all of the pertinent requirements that we review you for, you know, that's perfectly fine.

Nancy Mautone-Smith: All right.

Sue Moskosky: Okay.

Nancy Mautone-Smith: Okay. Our next question is, is a long term goal to have all Title X delegates doing EMR data collection on the same database?

Sue Moskosky: That's kind of a question that goes beyond the program review. And I don't - and again I, you know, I think, you know, we at the federal level can set broad requirements. Like we do expect we would like to have all grantees and all sub recipients be on an electronic health record system but we cannot require folks to all have the same. We can require you to gather and report the same data to us but we can't require you to all purchase the same data collection system. So I mean yes it's nice if there are a lot of people using the same system just in terms of being able to, you know, help each other and - but we cannot require that as the federal government.

Nancy Mautone-Smith: Thank you. All right next question, will there be a chart review tool that reviewers use? I'd be...

Sue Moskosky: You want to answer that Nancy?

Nancy Mautone-Smith: Yes. I'd be happy to answer that. Yes we have just finalized a chart review tool for reviewers. And we will be sharing that of course with regional federal staff along with the consultants and the grantees as soon as it is available. And it will actually be made available on the webTA Web site for folks to download.

Sue Moskosky: And one of the things that we did I know I wasn't sure exactly where that was in development but I know that we collected a lot of the chart review tools that were being used...

Nancy Mautone-Smith: Yes.

Sue Moskosky: ...by a lot of folks to kind of pick the best of the best. And so hopefully it will be something that you're happy to see.

Nancy Mautone-Smith: All right. Okay so another question is, are the documents for the introduction letter report timeline, et cetera, just for federal reviewers or will those templates be available to grantees?

Sue Moskosky: I think, you know, for the reason we developed them is so that there would be consistent information going out to grantees about program reviews and so that we would make sure that folks knew the timelines they had to adhere to.

Nancy Mautone-Smith: Yes.

Sue Moskosky: You're free to take those and, you know...

Nancy Mautone-Smith: You'll have them.

Sue Moskosky: ...and revise them accordingly for you to use with your site visits. But the purpose of it really was to bring more consistency to that. And one of the other things that was really important that, you know, we're that we're trying to get in place is the timing of program reviews. So all program reviews ideally each grantee should have a program review once during a project period sometimes it may be more than once during a project period depending on findings but at least once during project period. But we also need to time

those very carefully because as you know now when you compete in another grant cycle so every year we publish the funding announcement that lists all those service areas that are available for competition so when you re-compete for a new Title X grant you're considered a brand new grantee.

So program review findings that were from a previous project period don't carry over into a new one. And some - so that's why we need to make sure that the program review is done ideally if, you know, sometimes they'll do it late in the first year of a new project period if a grantee had been a grantee that's been a grantee for many cycles before. But if you're a brand new grantee, you know, it's going to take some time especially ones that haven't been part of the Title X system before. It takes a while to actually set up your system and, you know, actually have everything in place all of the policies, and procedures, and practices, and monitoring practices for your subs and all of those types of things.

So ideally for a brand new grantee that program review should probably be done sometime toward the end of the second year so that there's time for you to get the report develop any corrective actions that need a respond to any of the compliance findings. So we're trying to be very diligent about carefully scheduling those program reviews along with the regional federal staff so that we don't have federal regional staff that are having to do, you know, 12 program reviews in one summer because that's just not very doable for folks.

Nancy Mautone-Smith: Sue I think you've actually answered two question in one. I think that the other question was will federal reviews now be conducted every two years for every grantee across the nation? And I think you've...

Sue Moskosky: I think I've said...

Nancy Mautone-Smith: ...covered that.

Sue Moskosky: ...that it's, you know, at least once during the project period. So that's usually about once every three years for a specific grantee.

Nancy Mautone-Smith: Okay.

Sue Moskosky: We'll take...

Nancy Mautone-Smith: We'll take another question there are a number of places where the evidence says the grantee has a contract with sub recipients that specifies certain Title X requirements. And will the requirements to implement the Title X guidelines cover the separate requirements? Not – I'm a little uncertain about the question. I think that one thing I can say and Sue should certainly chime in is that where you may be seeing pieces of the program review tool that talk about grantee oversights and that's where I think perhaps this question is coming from that grantees have responsibilities for oversights if they're not providing direct services to making sure that all of the service sites within their network are operating in compliance with Title X. So I don't know that Sue you might want to add something or if that answers what your question is? And if you'd like to send in a follow-up question please feel free to do so.

Sue Moskosky: Right. The other thing that I wanted to point out and I think this became evident over the summer as program reviews were happening and it's one of the areas that I know they created some concern for folks out there and it's been something that we talked about a lot and actually it has to do with our looking for evidence that there are robust and formal linkages with for care for the care that's being referred where you're referring patients outside of your immediate project. So we actually are going to be making a modification to

that element in the program review tool to state that and what page was that on Nancy?

Nancy Mautone-Smith: That would be 46 and 48.

Sue Moskosky: Forty six and 48.

Nancy Mautone-Smith: I have it right here for you.

Sue Moskosky: Okay. So formerly in the old program review - the program review tool that's out there right now it had said that there's evidence of...

Nancy Mautone-Smith: Written formal written agreements.

Sue Moskosky: ...written formal agreements relevant to social and medical services, you know, for referrals. It was the whole thing about having written agreements for any kind of referrals. And so while we think that that's extremely important both in terms of making sure your patients get the care that they need as well as for continued sustainability of your programs there's not a – and while the regulations require that you do have to refer clients to other relevant medical and social services for instance that there wasn't a regulatory requirement that we could point to that actually required that those agreements be written. And so while we optimally would still like to be seeing that the program review tool is being modified to talk about that the reviewers can see to see evidence of your processes to refer clients to relevant social and medical services, agencies and optimally that those should be signed written collaborative agreements.

Then there's another place I think it's on page 47 under Section 9.5...

Nancy Mautone-Smith: On the 48.

Sue Moskosky: Oh it's the next page.

Nancy Mautone-Smith: Yes.

Sue Moskosky: Sorry about that.

Nancy Mautone-Smith: Okay.

Sue Moskosky: Okay. It's actually it is under 9.5 but it's at the top of Page 48. It's 9.5 Number 2. And it says service sites have evidence of processes for effective referrals to relevant agencies including and it goes through the various services and then again it says optimally that we'd like to see signed written collaborative agreements. So hopefully I know that that's been a big issue for a lot of you. Again I can't emphasize enough the fact that we really do think that written collaborative agreements are really what's needed to facilitate getting people to where they need to get and so that you know where you're sending people and that you can make a warm referral rather than just Rolodex referral but that - those elements have been slightly revised.

Nancy Mautone-Smith: Thank you. Our next question is will the Q&A today be posted? And yes that will be part of the recorded Webinar that is made available on the OPA Web site. All right you're review in the next question. Oh so the next question is regarding cultural competency training. Could you please elaborate on what you are seeking and also elaborate on whether cultural competency is gearing to target the LGBTQ community as participants? We're going to take a minute and turn to that section of the program review tool while we answer the questions.

Sue Moskosky: So we're thumbing through the program review tool just because we don't – we're not automatically clicked into what section that's it in the program review tool...

Nancy Mautone-Smith: Here we go.

Sue Moskosky: ...but I think that the main point that is being made with the cultural competency is that services should be respectful and provided, you know, with dignity and respect. But actually that particular piece is...

Nancy Mautone-Smith: Part of the...

Sue Moskosky: ...is part of the link to QFP. So it's part of the quality piece. And so it says that grantees has written policies and procedures that require their there's sites and sub recipients to receive training in culturally competent care. And that this should include how to meet the needs of the following key populations and it does include the LGBT too. But it's in the quality piece rather than in the compliance piece.

So I will say that we are, you know, one of the areas that we're going to be expanding the new QFP or the revised QFP is to what services, you know, what the evidence shows in terms of reproductive health and planning services for LGBTQ populations. So at is an area that we're extremely interested in, in terms of providing some guidance to Title X providers. So I hope that, that answers your question.

Nancy Mautone-Smith: Thank you.

Sue Moskosky: Another question about how reviewers are being trained on the new review tool and what kind of ongoing training or quality assurance is in place for

monitoring their performance. So I'll start and then Nancy can also provide some detail on that. So every program review consultant that is going to participate in a program review has to have participated either in the training that we did before the tool was launched or if they weren't able to participate in that there's an online training that they have to have completed where they go through the entire tool.

In terms of how we're going to assure continuing quality of those reviewers we do have a system set up right now where each reviewer is evaluated in terms of their performance. After the program reviews we also have gotten informal feedback, you know, from OP - at OPA in terms of some of the reviewers that, you know, if we have concerns about a particular reviewer or that they've not really been that they've gone outside of the program review tool and that they're not actually using that as their guide but rather they're kind of going off on their own in terms of the things that they were looking at then that also goes into our determination of whether we continue to use that - those reviewers.

OPA does have oversight in terms of and makes final determinations along with the contractor in terms of reviewers that are actually approved to participate on those program reviews. So we're trying to be as careful as possible. But if you all have feedback too if you've had a bad experience, you know, we're certainly open to hearing, you know, your feedback as well.

Nancy Mautone-Smith: Great and I'll just add to what Sue has said -- this is Nancy -- that there are several levels of review that happen to your draft report before you even ever get it. It's reviewed very carefully by both the regional and federal office staff including the regional health administrators and then reviewed up here at the central office. So many eyes look at it very carefully. And that's another level of quality checking that we do to make sure that anything that's

assigned really rises to that level. And they are, you know, many times where we - you may have, you know, been in an exit conference and heard that something was going to be assigned to him and you get your report and it's not there and it's because it's been quality checked by us up here. So that's kind of what happens behind the scenes because we really want to make sure that the reports are consistent, that they're accurate, and that as Sue said that reviewers are not going beyond where we've asked them to go during their training.

Okay. Next question will there be a version of the online review tool for sub grantees to use with their sub recipients?

Sue Moskosky: I'm not sure what the difference in your mind between a sub grantee and a sub recipient but I'm wondering whether the question is rather for grantees use with sub recipients? I'm not really sure whether - what's meant by that. But I guess it kind of goes back to the first question that was asked and that is, you know, you're free to use whatever we have produced with your sub recipients for your reviews. You don't have to. We cannot require that. If it's something, you know, again if you all - if we get feedback from a number of grantees that it would be helpful to you for OPA to have a model tool that was developed that was tailored more toward grantees review of sub recipients, you know, it's something we could definitely take into consideration. But at this point we weren't planning to create a special online review tool for grantees to use with their sub recipients but again it doesn't mean that we couldn't consider that.

Nancy Mautone-Smith: All right. Thank you. Our next question is asking if we can provide the new wording about written agreements...

Sue Moskosky: Oh.

Nancy Mautone-Smith: ...and we yes we are going to provide that. I don't know if we - if you want to read that again or not? It's actually in review right now to go to the contractor. So you're going to get it very imminently. But we can certainly after this Webinar we had planned to send out the version of the tool that has that updated language so you can wait or we can read it again.

Sue Moskosky: So it's actually in two places. It is actually in 9.4 Number 3. And what it is being changed to be wording as is as follows. There is evidence of a process to refer clients to relevant social and medical services agencies for example childcare agencies so a lot of it stays the same. And then in parens after it finishes the series of the different types of agencies then in parens it says optimally signed written collaborative agreements. So that's the first place.

Then in 9.5 Number 2 and again we're probably going to have to - we're going to - may need to revise this a little bit more from what I'm reading right now but it's - it will be saying service sites have evidence of processes that demonstrate effective referrals to relevant agencies exist including and then it goes through emergency care, HIV/AIDS care and treatment, infertility, blah, blah, blah, blah, blah and then at the end of that whole series of different types of agencies. So this is at the sub recipients. The grantees are overseeing their sub recipient agencies to make sure that they have effective referrals. And then at the end of that whole series it has the same wording that optimally there should be signed written collaborative agreements.

Nancy Mautone-Smith: Great.

Sue Moskosky: So hopefully that - oh you'll be getting it very soon. We're in the process of making those changes right this minute. Not right this minute...

Nancy Mautone-Smith: Not right now.

Sue Moskosky: ...we're talking to you right this minute.

Nancy Mautone-Smith: Okay. Next question is some of the evidence is duplicated in different sections. And then there's some examples here 9.7 Number 2 is very similar to 9.0 Number 4 and so on. And I can - as Sue is paging through for those I can speak a little bit that we are aware that in some cases there is a little bit of cross pollination between some of the sections even if it's the clinical reviewer or the admin reviewer and also between different reviewers.

But what you'll see if you look carefully is that although the evidence is often sort of the same piece of evidence that there may be components within that, that apply really specifically to that particular program requirement. So we were aware of it. It was deliberate. And I don't know Sue if you want to say something more about that or...

Sue Moskosky: Yes. I mean we really looked at - so there's subtle differences between these like...

Nancy Mautone-Smith: Yes.

Sue Moskosky: ...Nancy was saying even though they may appear to be duplicative. And so we'll take a look at it again just to make sure that they're very clear. But there are subtle differences in each of these but thanks for pointing those out and we will take a look again just to make sure that it's clear.

Nancy Mautone-Smith: Great, thanks Sue.

Sue Moskosky: How much time does the review by many eyes add to the process? So I guess the answer to that is in terms because the question is how much time does the

quote review by many eyes - and I don't know if you're referring to the regional office as well as headquarters as well as, you know, how much time does that add to the process and what is the current expected turnaround time for receiving a final report? So the answer to that question is that it shouldn't take more than six weeks for you to get a final report. And it's not so much issue of time from our perspective as it is quality and making sure the reasons that we I mean in the past up until probably a year and a half ago we weren't necessarily seeing all of those draft reports.

And so when we started looking at them, you know, those reports could be anywhere for some program reviews in some of the regions at three pages all the way to 50 pages. And we had some regional offices that were - and I would say 100 findings on some program reviews. And so we really started looking at them carefully just to ensure some consistency in terms of what the findings were, whether they were truly findings, and in a lot of cases we were finding that the findings were not truly compliance issues they were based on strong opinion. And so we really wanted to bring some consistency. And, you know, one of the things that we would hear is well so and so in region whatever had the same, you know, they have the same exact practices and they didn't have a finding or so we were getting lots of feedback through various channels with regard to the inconsistent inconsistency in both in terms of how people were being reviewed of how those program review reports were appearing.

So we will - what we were mainly doing is try to ensure some greater quality as well as consistency in terms of findings. And trying to make sure too that, you know, if a grantee receives a report that has 100 findings and, you know, 80 of those are really kind of minutia that could be actually folded into one kind of overall finding that, you know, if you have some major findings that are lost in the myriad other findings they grantees would just quickly be

overwhelmed and wouldn't even know where to start in terms of addressing them so that's, you know, some of the challenges here.

The other thing is that those program reviews we are told are subject to Freedom of Information requests. And so we want to make sure that they're as factual as possible without interjecting a lot of opinions and extraneous information that could be a concern. And so that's the reason for the many eyes. The other thing that we have instituted just fairly recently is that we are now asking that the regional office prior to doing the closeout report during a program review that they have a brief call with OPA headquarters so that they can review the major findings with us. And that's how we have in fact that's where the whole thing with the written formal written agreements actually kind of surfaced as being a real problem.

So I think it's helped I think it's helped the regional office staff feel like they're being supported by the central office. And I think it also has served to hopefully bring some clarifications to them for some things that they might have been citing as a finding when, you know, after they've talked it over with us it's not really a finding. So we're really I think one of the things with the online reporting with this new program review tool as well because it's not doesn't have as much open ended narrative section that's required that it should facilitate getting reports back to you all in a timely fashion. We're hoping that at some, you know, ideally we'd like to be able to get those review reports back to you, you know, with no later than six weeks but ideally within 30 days...

Nancy Mautone-Smith: Exactly.

Sue Moskosky: ...if possible.

Nancy Mautone-Smith: The project yes. Great, next question is where would we find the recorded online training for the review tool? This training is - are you looking for this or I'm not exactly sure?

Sue Moskosky: So I don't know if you're talking about the consultant training for the program review tool or whether you're talking about another training but...

Nancy Mautone-Smith: Yes the consultant training is on the Atlas webTA Web site. You need to register to be a consultant to have access to that training. Okay next we have time for a couple more questions. Okay this is a great question. How should we use the quality assessment section since they are not findings for the quality assessment for instance when does highly developed used versus fully developed in some clinics have each of the sections but they don't exceed should we only be used fully?

Okay. Well I can start talking all about that and Sue will fill in my many gaps. Well as we mentioned this is quality assessment is not does not carry the same kind of weight as a compliance assessment. But you should be certainly using this to really look at the overall quality provided within your entire network and addressing those areas for which, you know, you may find sites or sub recipients are not developed. Sue do you want to say a little bit more about how this is quality is different from...

Sue Moskosky: I think, you know, like if we had a grantee in the program review if all of the quality scores were needs development that would be a red flag to us that we had a grantee that had some real this deficiencies in terms of the quality of care that was being provided. So I think it's mainly kind of looking at and I think grantees are we know that you all are anxious to provide the best quality of care. And so hopefully this provides some helpful information back to you

all in terms of what should we do in terms of stepping it up to improve the quality care that we're providing.

So hopefully that answers. I think it's, you know, it's not the same as like Nancy said. I mean if you're violating Title X requirements, or Title X regulations, or statutes that's grounds for us potentially to taking away your grant, you know, if there were really serious concerns with regard to compliance with Title X statutory or regulatory issues. For instance if you're charging patients that are at or below 100% of poverty or if you're not, you know, providing priority for services, it's not to individuals from low income families, or you're not providing nondirective options counseling, or you're coercing patients to accept certain methods of contraception those are all Title X compliance issues that are grounds for removing your Title X grant.

But these other quality issues are really when we're looking at are you providing high quality services they're still things that concern us greatly but in terms of, you know, if we if you were consistently providing low quality care and you weren't doing any of the things in QFP believe me we would have some real concerns about that too. So it's not that these are not important or that we don't look at quality it's just - and again the regulations talk to quality but they don't talk to it in terms of these specific components and so I hope that helps some.

Nancy Mautone-Smith: Great. And then one more question here in the pod is please say more about accessing the webTA sites where the chart review can be downloaded and when this would be available? Okay. We can say couple things. We will be sending that the both the revised program review tool and the chart review tool out to federal office staff and as well as the grantee network as soon as they are cleared and finalized so you'll have that.

Additionally when the webTA site go live probably within the next month it will be available there. But likely at this point with the first iteration of the online system it won't likely be available to the public because you do have the login and have an account to do that. And right now at least at this point in the functionality of the Web site you need to be either a federal staff person or a consultant but that will, you know, change as we do more updates over the coming one to three years. But you will have the chart review tool made available to you because we want you to have it. And we want you to use it both, you know, to know what you're going to be assessed on but also to use it with yours sites. So we want to make it maximally available to the extent that we can.

Sue Moskosky: And if there's a way that we can, you know, make the program review tool electronically available where you can actually do it electronically...

Nancy Mautone-Smith: Yes, that's coming.

Sue Moskosky: ...we'll figure out a way of making that happen too where you wouldn't have to go through the webTA site.

Nancy Mautone-Smith: Yes.

Sue Moskosky: But optimally, you know, within the next however many years we'll have the functionality where even when you're addressing your program review findings your corrective action plan you can go right into that webTA site and then you'll provide what you're corrective action plan is. And it'll all be much more automated and much less, you know, emails or, you know, reports going back and forth where you're having to generate. But again that's in the future so...

Nancy Mautone-Smith: One to three years.

Sue Moskosky: ...that won't happen tomorrow.

Nancy Mautone-Smith: Keep in mind one to three years and five-year vision.

Sue Moskosky: Yes.

Nancy Mautone-Smith: So...

Sue Moskosky: Yes.

Nancy Mautone-Smith: ...we have time. Operator do we have any calls any callers on the phone that would like to ask a question in the remaining couple minutes? We'll take one more question and then we'll have closing remarks.

Coordinator: Participants on the phone if you'd like to ask a question please press Star 1 and record your name. Please make sure your phone is unmuted and record your first and last name clearly with the prompt. To withdraw your request please press Star 2, one moment to see if we have any questions. Excuse me speakers we have a questions from (Jing Ti). Your line is open.

(Jing Ti): Yes. Can you give us a little more guidance or information on the needs assessment that's referenced in the tool? Just need to know what this needs assessment needs to address and who needs to participate in it?

Nancy Mautone-Smith: Are you speaking -- well this is Nancy -- about the community putting input into your project or assessing the needs of the community?

(Jing Ti): Yes.

Nancy Mautone-Smith: That's a couple points. I think, you know, we can address that. Sue do you want to touch on that? I think the key pieces of that are that the community people who would be using them benefiting from your services should have input into your project. And that's not a new requirement.

Sue Moskosky: That's something we require. And then also as part of your any competing grant application you have to provide a needs assessment that documents that you've assess the need for services and how your - how you've identified where services are going to be provided and all of those kinds of things. But that is a long standing, you know, it's part of the regulation as long as Title X has been around. It's that, you know, making sure that you have a process for identifying who need services and how those are going to be how you're going to involve the community in helping to design your programs. So I don't know whether that helps?

(Jing Ti): That does. I just needed to make sure it was nothing above and beyond what we have been doing.

Sue Moskosky: It's no nothing new.

Nancy Mautone-Smith: No.

Sue Moskosky: Nothing new there.

(Jing Ti): Okay. Thank you all so much.

Sue Moskosky: You're welcome.

Nancy Mautone-Smith: Thank you. All right I think Sue we'll - with that we'd like to offer you the opportunity to provide closing remarks.

Sue Moskosky: Sure. So thank you all for participating this afternoon. Thank you Nancy for all of the work that she's done on the program review tool and on this presentation. So hopefully you all have found this helpful. And we're definitely here to answer additional questions. If you have them in the future please, you know, give us feedback help - let us know how we can help to support you and supporting your network of Title X providers and continue the good work. We appreciate what you do every day. So thank you so much.

Nancy Mautone-Smith: Thank you. Operator, we're all finished now.

Coordinator: And that concludes today's conference. Thank you for your participation. You may disconnect at this time.

END