

Quality Assurance Activity Calendar

Tasks to complete	Resources on next pg.	Week 1 Initial Engagement	Week 2 Home Visiting	Week 3 Supervision	Week 4 Management
Month 1	Staff	Review acceptance rate information Review Capacity Building Review messaging for initial contact with families	Service Referral follow-ups Review Case Notes and pre-enrollment activities Review FGPs Fatherhood involvement	Review Service Plans Review use of Curriculum	CQI Plans Share information and gather advice from Advisory Board Review messaging for initial contact with families
	MIS: Data Entry by the 10th	All data entry due	All Supervision data entry due	All Training data entry due	All Supervision data entry due
	Track & Plan	Review Referral Form contact attempts, referral outcomes and reasons	Review ASQ and ASQSE referrals Review Use of Health and Safety and Safer Sleep Practice	Review HV Rate Review supervision activities over last month	Review Caseloads & Caseweights Plan to increase referrals, screens & acceptance over next Q
	Reporting	QPTs: Last call for data entry	Select theme for monthly team meeting	Write and upload Quarterly Report for last Q to CMS	Conduct team meeting
Month 2	Staff	Review Engagement Activities in Case Notes Check in on list of cases w/referral outcomes not entered	FROG review Case file review- Use of CHEERS and reflective Strategies. Level change discussions.	Observations (FROGs and HVs) of staff or supervisors regularly carrying a caseload Review Family Goal Plans	Review Policies w/staff Review CO/TR/TO cases Distribute Staff surveys (once per year)
	MIS: Data Entry by the 10th	All data entry due	All form review due	All Training data entry due	All Supervision data entry due Review Caseloads & Caseweights
	Track & Plan	FROG completion dates (check for need to start a CQI plan)	Review PHQ2/9 referrals Review Case levels	Review Supervision Notes Look for outstanding data entry	Review program training needs Plan self-care activity Review family and staff retention rates
	Reporting	Reach out to referral partners	Select theme for monthly team meeting	Check in on QPT "problem areas" with staff; Review Supervision Forms (aka Notes)	Conduct team meeting (self-care activity?) Prep for ASR
Month 3	Staff	Review outreach activities, check on communication skills Check in on positive screens and not yet enrolled families	Review home visit activities over last month Check on TC Medical provider, Immunization rates and Well-Baby Visits	Check on anticipated level changes, level change forms & conversations with families.	Two participant satisfaction calls per HV Check for outstanding DEIB trainings/Review Equity Plan Observation of Supervisors by PM
	MIS: Data Entry by the 10th	All data entry due	All form review due	All Training data entry due	All Supervision data entry due Review Caseloads & Caseweights
	Track & Plan	Monitor referrals, screens and their outcome and develop strategies to improve	Review CHEERS Check-In Review Caseloads (direct staff and Supervisor)	Review QA Report for outstanding data entry Review cases discussed in-depth	Review program staff hiring needs Review documented supervision activities over last month
	Reporting	Run all PI reports to prepare for next cycle	Select theme for monthly team meeting	Review OCFS' QA Tool Review PCANY QA forms	Conduct team meeting

MIS Reports and other suggested resources to complete tasks above

	Resources	Week 1 Initial Engagement	Week 2 Home Visiting	Week 3 Supervision	Week 4 Management
Month 1	Staff	Accreditation/1-4 A&B Accept Rate and Analysis; Analysis/Capacity Building (One or Two-Step) Review One-Step Toolkit w/staff healthyfamiliesnewyork.org/Staff/Documents/One%20Step%20Toolkit.pdf	Analysis/QA Report Accred/7-3D Serv Ref needing FU Quarterlies/Service Referrals Quarterlies/Engag Summary (One-Step) report Accred/6-2 B&C FGP Report Analysis/OBP Information	Accred/Service Plan discussed in-depth TOL- Service Plan Handbook Accred/Supervision Cases discussed Analysis/Approved Curriculum Monitoring Analysis/Summary of HVLog Activities	Update CQI Plans Accred/1-1C Referral Source Outcome Summary Report Accred/ 1-2B Initial Engagement Process Report Accred/1-3 Timing of 1st HV
	MIS: Data Entry by the 10th	Impersonate staff to check dashboards for Cases with Past Due HVs and Post TCID items due in the current Q	Supervisor Form Review on Sup dashboard	Training/Training BPS Report Training/Training Required Topics HFNY New Hire Checklist	Accred/ 12-1B Reg Sched (Summary) Accred/12-3 Supervision of Supervisors
	Track & Plan	Analysis/Referral Form Information	Accreditation/6-5.Developmental Delay Tracking and FU Accreditation/6-4.C/D Use of Health Safety and Safer Sleep Practice	Accred/4-2B Home Visiting Completion Rate Analysis Partial HVLogs on dashboard Accred/12-1B Summary of Sup Activities	Accred/8-1B Annual Case Weight Report Accred/12-1.D Supervisor Ratio/Case Weight Lists/Program Caseload Summary
	Reporting	Quarterlies/Quarterly Performance Targets Report run by staff member	Check TOL/team building activities; Look for trends in MIS data to discuss	Report Catalog/search for 'QTR' for complete list	Collect staff's feedback during meeting
Month 2	Staff	Lists/Case Note Report Accred/1-1C Referral Source Outcome Summary Analysis/Aggregate Counts	Read FROG Narratives Analysis/ Summary of HVL Activities Supervision Notes TOL- CHEERS Handbook and FROG Toolkit	Accred/12-2C Observation by Supervisor Accred/6-2 B&C FGP Report Accred/Supervision Cases discussed	Share policy changes w/staff and update procedures Analysis/CO/TR/TO Tracking report
	MIS: Data Entry by the 10th	Impersonate staff to check dashboards: Cases with past due HVs, Post TCID items	Supervisor Form Review on Sup dashboard	Training/Training BPS Report Training/Training Required Topics HFNY New Hire Checklist	Accred/ 12-1B Reg Sched Sup (Details) Accred/12-3B Supervision of Supervisors Accred/12-1.D Supervisor Ratio/Case Weight
	Track & Plan	Accred/2-1B/C FROG Timing Report Review Potential Enggement Strategies, messaging and planning tool from One-Step Toolkit	Analysis/Big Three - Assessment PC1 Issues Accred/7-4E Referrals for Elevated Depression Screen Details and Summary Lists/Level Change History Report; HFA Level Change Forms in Case Documents	Accred/ 12-1.B Reg Sched Sup (Summary) Analysis/Quality Assurance Report	Check HFNY Calendar for upcoming trainings, events, etc. Accred/3-4 A&B Retention Rate Analysis
	Reporting	Reach out to referral partners	Check TOL/team building activities; Look for trends in MIS data to discuss	Quarterlies/Quarterly Performance Targets Report run by staff member Review Supervision Forms	Check the TOL website for ideas on self-care Check ASR template under Reporting
Month 3	Staff	TOL- Communication skills activities for FSS/FRSs and Family Engagement Webinar	Analysis/ Summary of HVL Activities Lists/PC1/TC Medical Provider Listing Accred/7-2B&C TC Immunization Quarterlies/Quarterly Performance Targets HD4, HD5, HD6	Level Change Form Lists/Level Change History Report Review HFA Level Change Forms in Case Documents	Review part satisfaction surveys Check ASR narratives for DEIB language. Equity Plan Observation of Sups by PM notes
	MIS: Data Entry by the 10th	Impersonate staff to check dashboards for Cases with Past Due HVs and Post TCID items due in the current Q	Supervisor Form Review on Sup dashboard	Training/Training BPS Report Training/Training Required Topics HFNY New Hire Checklist	Accred/ 12-1B Reg Sched Sup (Details) Accred/12-3 Supervision of Supervisors Accred/12-1.D Supervisor Ratio/Case Weight
	Track & Plan	Analysis/Capacity Building Accred/1-1C Referral Source Outcome Summary	Accred/6-3D CCI Observations Lists/Program Caseload Summary Accred/12-1D Sup Ratio/Case weight	Analysis/Quality Assurance Report Accreditation/SP discussed in-depth	Review program staff hiring needs TOL- Supervision Note Guidelines
	Reporting	Report Catalog/In search box add 'Indicator' for comp list of reports	Check TOL/team building activities; Look for trends in MIS data to discuss	Integrate OCFs' QA Tool site visit feedback Integrate PCANY annual feedback	Conduct team meeting- Review PI results (twice annually)