

## Monitoring Visit Summary Sheet

Chart Reviews:	# Satisfactory	# Possible	Percentage
Address	19	19	100%
Flow sheet	4	19	21%
Mother ID on Infant/Child Record	8	8	100%
Infant Midcertifications	2	2	100%
ID Documentation	25	27	93%
Residency Documentation	17	18	94%
Income Determination	16	17	94%
Income Documentation	8	12	67%
Heights/Weights	34	41	83%
Hemoglobin	9	11	82%
Health History - Infant/Child	25	25	100%
Health History - Women	43	54	80%
Alcohol, Tobacco, and other Drug (ATOD)	6	9	67%
Risks Identified	12	19	63%
Documentation of Risks	2	6	33%
Two N.E. Contacts	6	7	86%
Mandatory Topics	4	4	100%
Appropriate Nutrition Education Topics	18	25	72%
N.E. Handouts	15	24	63%
Goals	10	50	20%
Appropriate Food Package *(See Note)	17	19	89%
High Risk Nutrition Referral	0	5	0%
Appropriate Next Appointment	9	19	47%
Ineligible Participants	0	0	N/A

### **Rational for percentages less than 100:**

**ID Documentation:** A caregiver ID was documented as AHCCCS, but has AZ Drivers License on the mom's record on the same day. Another caregiver's ID was Birth Certificate, but has Drivers License on the mom's record.

**Residency Documentation:** One client had a city entered in street address, a PO box in mailing address and the proof of address was Utility Bill.

**Income Determination:** Income was determined as zero, but a note was entered that states 'client will provide requested documents on the next visit?'

**Income Documentation:** AHCCCS was documented as adunitive eligibility for 3 clients, but AHCCCS was not selected for any family member nor were the pregnant or infant check boxes selected. AHCCCS automated verification was documented as proof of AHCCCS.

**Heights/Weights:** Birth measures only were used for three infants at certification, new measures were not taken. Two infants' birth measures that were used for certification were older than 60 days. One pregnant woman was seen, but a new weight was not taken. A child had inconsistent measures (decreasing for three consecutive visits).

**Hemoglobin:** A pregnant woman did not have her hemoglobin measured during her pregnant certification. A child did not have a hemoglobin repeated at certification when the last hemoglobin was almost a year old.

**Health History - Women:** All mandatory fields were not completed, including number of previous pregnancies, date last pregnancy ended, number of infants and month prenatal care began.

**Two N.E. Contacts:** One client did not have second nutrition education contact, but had been in the current certification for seven months and had two clinic visits.

**Food Package:** Two clients were issued food packages containing regular and lactose free milk for a period longer than one month. Mixed milk packages should only be issued for a client to try lactose free milk. After the trial only one milk type should be issued.

**Unsatisfactory (percentages less than 80):**

**Flow sheet:** The flow sheet was either incomplete or blank.

**ATOD:** All fields were left blank for two clients and one client has the smoking question not completed.

**Documentation of Risks:** Two clients had a risk that required documentation, Lack of Sanitation and Routinely Using Nursing Bottles Improperly, but no documentation was recorded. The risk Routinely Feeding Sugar Drinks was assigned and the documentation did not include specific amounts of sugar drinks consumed. Lactose Intolerance was assigned by the documentation did not list symptoms the client experienced when consuming dairy.

**Appropriate Nutrition Education Topic:** Four clients had four to seven different topics selected at one nutrition education. An infant topic was selected for a child. Topic selected for a client was not related to the client's risks.

**Risks Identified:** All risks were not captured, including Breastfeeding Infant of a Priority \_ Mother and Closely Spaced Pregnancies. The health interview was not completed, so the risk Closely Spaced Pregnancies was not auto-generated. Date last pregnancy ended, number of previous pregnancies and month prenatal care began was not entered, so all applicable risks may not have been assigned. Two clients had homeless documented on the demographics tab under address but did not have Homeless added as a risk. Lactose Intolerance was not assigned as a risk in the current certification, but was documented at a previous certification and the client was issued a food package containing lactose free milk. Three clients were inappropriately assigned the risk Failure to Meet Dietary Guidelines. One client did not meet the age requirement of two years and two clients has other risk assigned. Failure to Meet Dietary Guidelines can only be assigned if no other risks are found and the client is a woman or children 2 years and older.

**Appropriate Next Appoitment:** Check pickup appointment types are given to clients regardless of the appointment type needed, i.e. recertification, nutrition education or high risk.

**N.E. Handouts:** Four education sessions did not have a handout documented. One education session had three handouts documented. Several education sessions had inappropriate handouts.

**Goals:** Goals did not match the nutrition education topic, are limited to one or two words (example breastfeeding and healthy drinks) and are not detailed enough to be a goal, the ways to meet the goal were not specific to aid the client in accomplishing the goal or there were no ways to meet the goal.

**High Risk Nutrition Referral:** No high risk clients found during file reviews had been referred to the RD.

