Office of Long-Term Living
Participant Review Tool (PRT)
INSTRUCTIONS
For OBRA Waiver and Act 150 Program Service Coordinators

OBRA Waiver and Act 150 Program Service Coordinators (SCs) are to complete the Participant Review Tool (PRT) during a face-to-face visit at a minimum of once each calendar year. The questions on the tool can be used at other times during the year to assist in ensuring participant health and welfare and appropriate service planning. Prior to the face-to-face visit, the SC should check the Enterprise Incident Management (EIM) system to determine if there have been any critical incidents reported since the last face-to-face visit or contact with the participant. The face-to-face visit is to occur in the participant's residence.

This tool will enable OLTL and SCs to better understand each participant's needs and the appropriateness of the service plan to address those needs. SCs must ask the participant all questions consistent with their service model and living arrangement. The participant's responses must be documented for each question. It is expected that the participant will answer the questions. The SC must provide needed accommodations for communication. If the participant declines accommodations, please ask the participant's chosen representative to answer the questions.

When filling out the interview sheet with the participant:

- ✓ The participant must be present.
- ✓ The face-to-face interview must occur in the participant's home.
- ✓ The interview should focus on the participant's needs.
- ✓ The Direct Service Provider should not be present during the interview.
- ✓ The Direct Care Worker should not be present during the interview.
- ✓ Ask additional follow-up questions as needed.

Gaining Access to QuestionPro
SCs are to utilize QuestionPro software via the web. Each agency is to complete and submit the attached SC Registration Form for QuestionPro with names and email addresses of all SCs who will utilize the tool. Each agency will email this form to the OLTL PMT REGISTRATION Resource Account at ra-pwoltlpmtreg@pa.gov . OLTL will send an email invitation to each SC that includess a link specific to that SC. The SC will use their unique link each time they complete the tool.

Methods for Completing the Tool
1. **No Laptop in Field:** Complete the Paper Form; have the participant sign the one-page attestation form; return to office and enter information into QuestionPro and submit.
2. **Laptop in Field/No Internet Access:** Record information on the Paper Copy of the Tool or the Electronic Word Version of the Tool; have the participant sign the one-page attestation form; return to the office and enter information into QuestionPro and submit.
3. **Laptop in Field/Internet Access:** Enter information directly into QuestionPro while in the field and submit; have the participant sign using QuestionPro's software. If the participant is unable to sign using the QuestionPro software, then have the participant sign the one-page attestation form.

Printing the Completed Survey for the Participant's File

1. Once the survey is submitted in QuestionPro, the SC will receive an email with a copy of the completed survey. The SC-specific link that is used to complete the survey determines the email address that receives a copy of the completed survey. Make sure the HTML email format is selected in order to view the completed survey.

2. Other options for printing and saving an electronic copy while on the last page of the survey:

   - Print a copy of the completed survey by clicking the "Print" icon in the upper right-hand corner.

   - Save an electronic copy that can be printed later by clicking on the "PDF" icon in the upper right-hand corner.

3. The participant's file must contain a completed copy of the tool that was entered into QuestionPro and a one-page attestation form signed by the participant. The completed, hand-written paper version of the tool does not meet this requirement. (Note: If the SC obtains the participant's signature directly on the survey when using a laptop in the field with internet access, then the one-page attestation is not required.)

Information on Specific Sections

- Sections 1, 2, and 5 are to be completed for <u>all</u> participants.

- Section 3 is to be completed <u>only</u> if the participant is in the participant-directed model or uses a combination of participant-directed and agency model services.

- Section 4 is to be completed <u>only</u> for participants who reside in provider-owned or operated settings.

- Section 5 questions are observational in nature and should be responded to **<u>only</u>** by the SC.

  - If any significant concerns are raised in Section 5 or any of the survey questions, the SC supervisor must sign off on the completed review tool and mitigation plan. The SC supervisor is responsible for ensuring that the mitigation plan is carried out.

Navigating in QuestionPro

- QuestionPro does not have a "Back" button. You cannot move back to previous screens.

- Required questions are marked with a red asterisk. You will not be able to continue with the survey unless all required questions are answered.

- Skip Patterns have been set up in QuestionPro that will automatically skip certain questions based on responses to previous questions.

Any questions regarding the PRT or QuestionPro software may be emailed to RA-PWOLTLPMTREG@pa.gov.