Monitoring Preparation Checklist

VRTAC-QM

RSA has selected you as part of the next monitoring cycle.
Here are items for consideration as you prepare for your review.

PREPARATION IS KEY!

- ☐ Participate in a monitoring Community of Practice with other states also going through monitoring this year. CSAVR and the VRTAC-QM have partnered to facilitate these meetings. It is helpful to talk with others about their preparation and experiences as each agency is through the monitoring process.
- ☐ Read your last monitoring report to clearly understand what corrections were required and how the agency completed those corrective actions. If you have time, read monitoring reports from other states.
- ☐ Review your Single State Audit findings and corrective actions for the time period under review.
- ☐ Designate a monitoring prep team with key staff. It is suggested to include a counselor as their perspective is enlightening.
- ☐ Designate a point person for the review in communications with RSA. Everything runs through the point person.
- ☐ Identifying a structure for managing the information flow to RSA is critical. SharePoint is one possible solution.
- ☐ Address Personally Identifiable Information (PII) and ensure you are not sending document that include PII.
- ☐ Consider numbering the pages of items submitted to RSA ahead of the review. Page numbers can serve as a reference point during the review, so everyone understands what page an RSA question is referencing.
- ☐ Read the Monitoring Technical Assistance Guide (MTAG) with your team and use the VRTAC-QM State VR and SE Program Monitoring Prep Workbook to help you document your answers to each of the questions listed in the MTAG. An in-depth review will give your entire team a good understanding of where the agency stands regarding the focus areas and provide you with time to prepare responses and illustrate specific stories and information you wish to share with the monitoring team.

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- ☐ Use the MTAG appendix to help you run data tables that RSA is reviewing during monitoring. Analyze the data and be ready to discuss. Compare your data with the data that RSA sends and discuss any discrepancies you may find.
- ☐ Start developing a technical assistance list you want to request from the monitoring team and include this in the Monitoring Prep Workbook.
- ☐ Prepare for monitoring prep calls with RSA. Those are as important as the monitoring process itself.
- ☐ Determine who should be in the various monitoring sessions and consider inviting participation from CAP, the SRC, and the Workforce partners as applicable.
- ☐ Don't assume you are speaking the same language. Be prepared to explain what you do and how you do it.
- ☐ Staff slated to present should practice screen sharing before the visit if it is virtual.
- ☐ You can utilize Microsoft Teams to start a "channel" for the review. You can save files like your data profile, other supporting documentation, and assign questions to be answered from the MTAG. It also allows you to chat with each other in a timely fashion.
- ☐ Be prepared to demonstrate how your case management system works in a high-level overview.
- ☐ Keep agency staff informed along the way. It takes the mystery out of monitoring.
- ☐ Be aware that the RSA team reaches out to both the Client Assistance Program (CAP) and the State Rehabilitation Council as part of the review process.
- ☐ Refresh training for staff on policies and procedures.
- ☐ Ask the VRTAC-QM staff to participate in the monitoring if needed.
- ☐ Designate a note-taker or two for each monitoring review session.
- ☐ Review notes as a team after each session and ensure you follow up on any items requested from RSA. Staying organized will help to ensure nothing falls through the cracks.
- ☐ Remember, this is a journey and not a destination. Keep making data-informed decisions as you manage your program.

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