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| **CHART REVIEW LOG (Part II). Partial Sample (i.e., 6 clients). TEAM\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Client ID\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Reviewer Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |
| **ST2. Co-Occurring Disorders & MH Assessments CLIENT INDICATED AS HAVING A SA DIAGNOSIS?** [ ] Yes [ ]  No (Note: if team didn’t indicate, but other data sources clearly indicates, mark “yes”) |
| **Assessments Exist?****Intake?** [ ] Yes [ ]  No Embedded in broader assessment or stand-alone? **Ongoing?** [ ] Yes [ ]  No Embedded in broader assessment or stand-alone? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Most recent date of ongoing assessment: \_\_\_\_\_\_\_\_\_\_\_\_\_\_ Who Completed Assessment?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  | **Assessment Quality?**Does the assessment examine the interrelationship between substance use and mental health symptoms and behaviors? [ ] Yes [ ]  No How would you rate the quality of the content captured in the Substance Use assessment? [ ] low [ ] moderate [ ] high | **Stages of Change Readiness or Treatment?**Documentation of Stages of Change Readiness or Treatment anywhere in the chart? [ ] Yes [ ]  No (Where? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_)Does the completion of Stages of Change Readiness or Treatment assessment appear routine and updated (i.e., you see more than one assessment for a given client)? [ ] Yes [ ]  No Did the Stages of Change for this client appear to align with apparent client readiness and/or treatment strategies being used by the co-occurring disorders specialist? [ ] Yes [ ]  No [ ] Unsure | Any **additional observations** regarding substance use assessments reviewed (e.g., timeliness, quality of the assessments) or assessment of stages of change readiness? |
| **ST5. Employment and Education Assessment CLIENT INDICATED AS RECEIVING ANY EMPLOYMENT/EDUCATIONAL SERVICES?** [ ] Yes [ ]  No (If no, then skip this section) | **Other Assessments** |
| **Assessments Exist?****Intake?** [ ] Yes [ ]  No Embedded in broader assessment or stand-alone? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**Ongoing?** [ ] Yes [ ]  No Embedded in broader assessment or stand-alone? Most recent date of ongoing assessment: \_\_\_\_\_\_\_\_\_\_\_\_\_\_ Who Completed Assessment? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  | Is the assessment being used the IPS Career Profile\* or a close version of the Career Profile?  [ ] Yes [ ]  No How would you rate the quality of the content captured in the assessment?  [ ] low [ ] moderate [ ] highDoes the assessment appear to be updated and used for the purpose of job search and ongoing supports? [ ] Yes [ ]  No See a copy of Career Profile here for reference: <https://www.ipsworks.org/resources/programs/program-tools/> | Any **additional notes** about the employment assessment, such as whether Career Profile is used to seek good job matches, provide follow-along supports, when it is being completed (ideally, it is completed when someone voices interest in work)?  | **Other Assessments Observed** (e.g., Nursing, Functional Skill Assessment, Violence Risk Assessment): |
| **OS4. Daily Team Meeting: Client Schedules (Criterion #3).** Examine whether the client schedule serve as a functional bridge between plans and what is being delivered. Summarize what is observed - are they formatted so that they can be shared with the client; are they organized by week or month; what level of detail is included in who (staff), when (day, even time of day), and why (intervention) the client is being seen? |
| **PP1. Strengths Inform Planning** | **CP6. Crisis Planning** |
| Rate the extent to which documented strengths and resources are both personal and rich in quality:1 [ ]  Poor[ ]  Moderate[ ]  Good [ ]  No Strengths Assessed | List examples of documented strengths and resources: | Do you see evidence of strengths and resources informing the development of action steps and/or interventions within the plan itself? (e.g., if a person is noted to be artistic, is there deliberate effort to draw upon this when addressing other needs or challenges in the plan?)  [ ] Yes [ ]  No  | (If Marked “Yes” in previous column:) List examples of how strengths/resources informed planning: | How well does the crisis plan appear to capture practical and individualized crisis planning information, including signs of increased distress or illness, options for how to best address emerging crisis? [ ]  Poor[ ]  Moderate[ ]  Good [ ]  No Crisis Plan |
| **PP2. Person-Centered Planning** |
| Two most recent plan dates:Revisions or Addendum Dates: | Write down example Recovery or Long-Term goal from this plan | Write down example Short-Term goals/Objectives from this plan | Indicate other observations of the plan itself, such as the overall flow of the plan -- do interventions relate (upstream) to objectives/goals? Do objectives/short-term goals logically relate to the long-term/recovery goal? Are interventions personalized, relatively specific, and reflect what the team is going to do (not the client)? Do the plans appear to follow from a person-centered process? |
| **PP3. Interventions Target a Broad Range of Life Domains.** Assess the extent to which planned and delivered interventions target a broad range of life domains. We are interested in **life domains** other than medication management and symptom monitoring. For Criterion A, refer to planned interventions not the goals. For Criterion B, do not include documented passive observations, such as "presented with poor hygiene," as an intervention.  |
| **Life Domains:** | **PP3. Criterion A** | **PP3. Criterion B** | **PP3. Criterion C** |
| 1) Distressing symptoms and/or challenging behaviors addressed by psychotherapy2) Employment and Education3) Healthcare management and prevention (this includes dental)4) Housing access and resources5) Family Relationships6) Finances/Budgeting7) Functional daily living skills - household maintenance8) Functional daily living skills - self-care (e.g., grooming, hygiene) 9) Functional daily living skills—social/interpersonal skills, leisure, and/or mobility10) Legal aid and supports11) Psychoeducation for symptom management12) Relapse prevention for mental health symptoms (using WMR)13) Substance use | **Life domains** that were addressed with a planned intervention **in the person-centered plan** (list numbers from previous column):  | **Life domains** that were addressed with an intervention, per the reviewed **progress notes** (list numbers from previous column)**:** | Are at least 50% of the planned interventions (A) present in delivered interventions (B), indicating alignment?"[ ] Yes [ ]  No  |
| 1 “Good quality” examples would list at least 8 personal strengths, e.g., has a great sense of humor, is attentive to details, completed High School, has a supportive family, takes good care of her dog. “Good patient” attributes, such as “engaged in treatment and takes medications,” should not receive credit. |