Fidelity Review Spreadsheet

Presented by the UNC Instititue for Best Practices

October 11, 2022

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Poll Everywhere

Smartphone Web Option:
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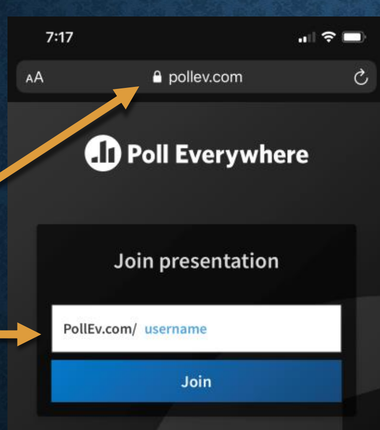
(3) Type: pennyliles



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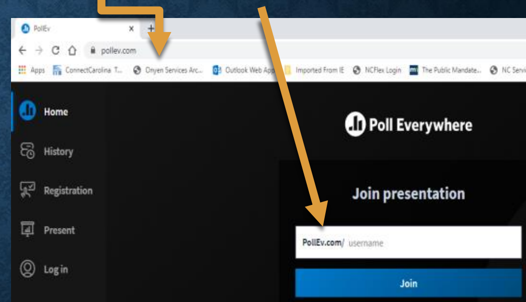

**This option will require you to switch screens back and forth between poll everywhere and presentation.

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What is your favorite Halloween movie?

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What are your thoughts about the fidelity spreadsheet?

Never used it.

My team only uses it because it is required by my agency and for fidelity.

Appropriately nicknamed "The Beast!"

Great way to track data and provide supervision to my staff.

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What are you hoping to get out of today?

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History Of The Fidelity Spreadsheet

- Original version created by DMH for fidelity purposes (different columns, with information around TCL – how this was originally collected)
- Revised in 2016 for a dual purpose, with the intention to be a supervision tool for IPS teams
- Additional revisions in 2020 and 2022

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- Read the instructions!!!!!!!
- Adhere to the submission deadlines
- Ask questions
- Accuracy is critical!

- Excel information will be utilized for:
  - Randomizing chart selection
  - Cross-referencing from chart data
  - Interviews
  - Ratings
  - Report Writing

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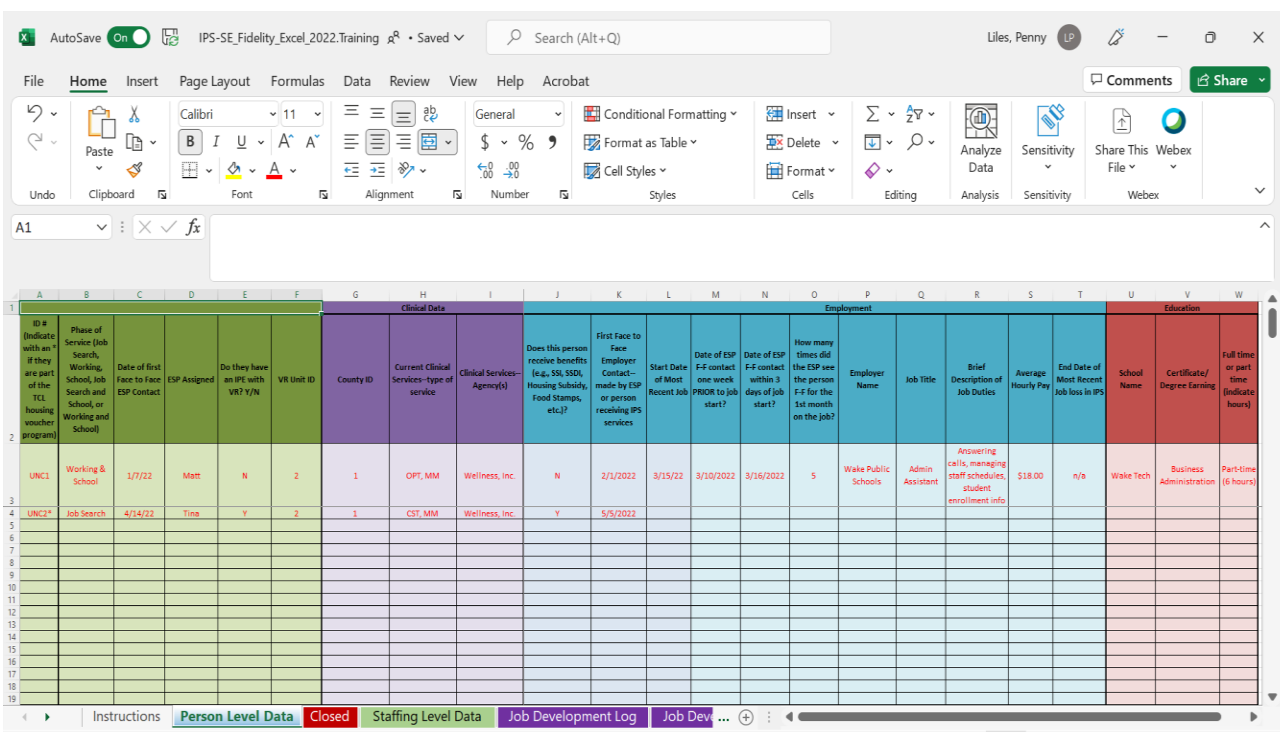

						Clinical Data			Employment											Education		
ID # (Indicate with an * if they are part of the TCL housing voucher program)	Phase of Service (Job Search, Working, School, Job Search and School, or Working and School)	Date of first Face to Face ESP Contact	ESP Assigned	Do they have an IPE with VR? Y/N	VR Unit ID	County ID	Current Clinical Services--type of service	Clinical Services--Agency(s)	Does this person receive benefits (e.g., SSI, SSDI, Housing Subsidy, Food Stamps, etc.)?	First Face to Face Employer Contact--made by ESP or person receiving IPS services	Start Date of Most Recent Job	Date of ESP F-F contact one week PRIOR to job start?	Date of ESP F-F contact within 3 days of job start?	How many times did the ESP see the person F-F for the 1st month on the job?	Employer Name	Job Title	Brief Description of Job Duties	Average Hourly Pay	End Date of Most Recent Job loss in IPS	School Name	Certificate/ Degree Earning	Full time or part time (indicate hours)
UNC1	Working & School	1/7/22	Matt	N	2	1	OPT, MM	Wellness, Inc.	N	2/1/2022	3/15/22	3/10/2022	3/16/2022	5	Wake Public Schools	Admin Assistant	Answering calls, managing staff schedules, student enrollment info	$18.00	n/a	Wake Tech	Business Administration	Part-time (6 hours)
UNC2*	Job Search	4/14/22	Tina	Y	2	1	CST, MM	Wellness, Inc.	Y	5/5/2022												

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Person Level Data Tab Column A: Unique ID

Assign each person a unique ID

- **NOT** the medical record number because this is PHI (Protected Health Information)
- Easiest is to number 1,2,3….
- Indicate with a * if the person has a TCL (Transition to Community Living) housing voucher

Provide a key that matches the names and the IDs when evaluators arrive onsite

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Person Level Data Tab Column B: Phase Of Service

Use the drop-down menu to choose which phase of service

If the person is working **AND** the ESP is helping to find a different job, enter Job Search

This is used to randomize charts for 40% in job search and 60% in job supports

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Person Level Data Tab Column C: First ESP F2F Contact

Enter the date of the first **<u>in-person</u>** meeting with the ESP (intake, not the engagement milestone date)

This is used to calculate rapid job search, along with first in-person employer contact

If there is no in-person date, leave it blank and reviewers will clarify on-site

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Person Level Data Tab Column D: ESP Assignment

- Enter the ESP assignment at the time of the data submission
- This is used for rating caseload size

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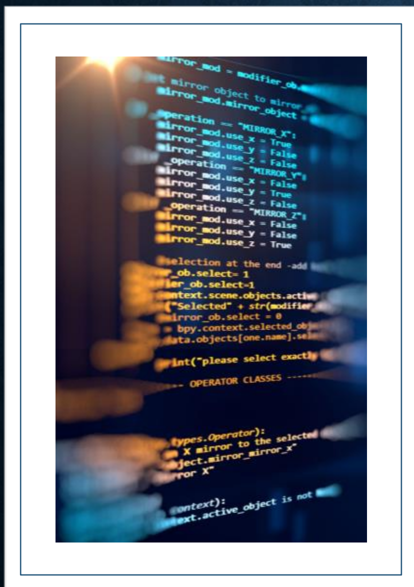

Person Level Data Tab Column E: Open IPE With VR

- Indicate with a Y or N.
- Open in BEAM (or the new VR case management system), not a referral to VR.
- Not included in the ratings, but we like to document the percentage of shared cases with VR to guide feedback and recommendations (the entire state will be transitioning to a value-based payment structure that will necessitate shared cases).

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Person Level Data Tab Column F: VR Unit ID

- Create a unique ID for each VR Unit office you are working with for IPS.
  - If it is only 1 office, enter one ID (e.g., 1)
- Easiest is to number 1,2,3… or A, B, C…
- Use the VR ID to list which unit office the individual is receiving VR services.
  - If the individual is not with VR, write **None** or leave blank.
- Provide a key that matches the VR Unit Office and the ID when evaluators arrive onsite
- This is used to know which VR unit(s) the team is working with for ratings on frequency of VR meetings.

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PERSON LEVEL DATA COLUMN G: COUNTY ID

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- Some IPS teams serve multiple counties. Please assign a unique ID to each county where the team is serving individuals at the time of the review.
  - If the team is only serving 1 county, use one ID for all counties (e.g., 1)
- Use the County ID to list where the individual receives mental health services.
  - If the individual is not receiving any mental health treatment, enter **None** or leave blank.
- Provide the ID and the County assignment when evaluators are on-site.
- ***This information is used to rate mental health team assignment and frequency of contact with the mental health team.

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Person Level Data Tab Clinical Column H: Current Clinical Services

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- Enter the current mental health services someone is receiving.
- Review what is listed in your EMR as this does not always mean the person is engaging in services.
- If the individual is not receiving mental health treatment (only receiving IPS), write **None**.

This information is used for ratings on the 2 behavioral health integration items

- If 20% of the caseload is with an external provider, their executive leadership will also be interviewed.

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Person Level Data Tab Clinical Column I: Current Clinical Agency

- Enter the current mental health provider(s).
- If they are receiving mental health services a multiple agencies, enter both agencies.
- If the individual is not receiving mental health treatment (only with IPS), write **None**.

This information is used for ratings on the 2 behavioral health integration items

- If 20% of the caseload is with an external provider, their executive leadership will also be interviewed.

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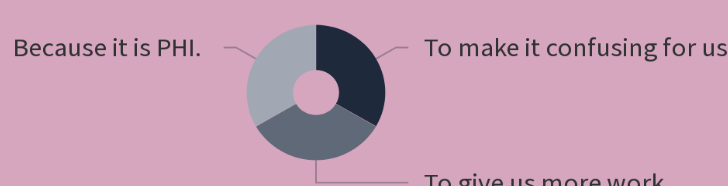
Respond at **pollev.com/pennyliles**

Text **PENNYLILES** to **22333** once to join, then **A, B, or C**

Why do evaluators ask for a unique ID for the person, VR unit office, and county where they receive mental health treatment?

To make it confusing for us. **A** | To give us more work. **B** | Because it is PHI. **C**



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Text **PENNYLILES** to **22333** once to join

Why do evaluators ask for specific and current mental health treatment information?

A: To ensure people are receiving mental health treatment.

B: To calculate the ratings for the 2 mental health integration fidelity items.

C: They are being nosey.

D: To determine if external behavioral health leadership needs to be interviewed.

Both B & D

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Person Level Data Tab Employment Column J: Receiving Benefits

Any benefits (SSI, SSDI, Housing Subsidies, Food Stamps, Veteran's Benefits, etc.)

Indicate with a Y or N

This is used to calculate ratings for benefits counseling

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Person Level Data Tab Employment Column K: First F2F Employer Contact

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Enter the date of the first **in-person** employer contact.

Can be by the ESP only, the individual only, OR the ESP & individual together.

The remainder of the employer contacts must be by the ESP or the ESP and the individual.

Be sure there is a progress note indicating the first ESP employer contact. If done by the individual alone, also document it in a progress note.

Used to calculate rapid job search, along with first ESP contact.

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Person Level Data Tab Employment Column L: Job Start

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Enter the start date of most recent job

Only jobs that began during IPS count in the ratings for diversity of jobs and employers and for competitive jobs.

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Person Level Data Tab
Employment
Column M: ESP F2F Contact Prior To Job Start

Enter the date of when the ESP met with the individual **in-person** PRIOR to job start.

If there is no in-person date, leave it blank and reviewers will clarify on-site.

This column is used to calculate ratings for time-unlimited follow-along supports.

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Person Level Data Tab Employment Column N: ESP F2F Contact Within 3 (Calendar) Days Of Job Start

- Enter the date of when the ESP met with the individual **in-person** AFTER the job start.
- If there is no in-person date, leave it blank and reviewers will clarify on-site.

This column is used to calculate ratings for time-unlimited follow-along supports.

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Person Level Data Tab Employment Column O: Number Of F2F Contacts By ESP The First Month On The Job

- Enter the number of times the ESP met with the individual **in-person** during the first month of the job.
- If there is no in-person date, leave it blank and reviewers will clarify on-site.

This column is used to calculate ratings for time-unlimited follow-along supports.

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Covid Flexibilities And Fidelity

- Telehealth flexibilities were put in place to keep staff and individuals safe during a pandemic and to ensure there was not a gap in services.
- The IPS fidelity scale was normed for services provided in-person. Reviewers **CANNOT** change the scale!
- However, if the first ESP contact, first employer contact, and follow-along supports occurred through telehealth, you can enter that date in the columns, BUT we ask that you highlight it in some way so that we know it was NOT in-person (e.g., different color font, highlighting the square, using a symbol).
  - This **WILL NOT** change the ratings for rapid job search or time-unlimited follow-along supports. Reviewers will make qualitative comments on these items.
  - This could **POSITIVELY** impact ratings for individualized job search and individualized follow-along supports.

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Person Level Data Tab Employment Columns: P - R

Column P: Employer name

- If it is the same employer, but at a different location, indicate which location.
- This is used for rating the diversity of employers.

Column Q: Job title

Column R: Job duties

- Be specific! This item is more about the job duties than the job title.
- This is used for the rating of diversity of job types.

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Person Level Data Tab Employment Columns: S - R

Column S: Average Hourly Pay

- This item is used for the rating of competitive employment.

Column T: Job end (if applicable)

- Enter the end date of the job you are listing, **NOT** a previous job. This column should reflect CURRENT employment information.

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Person Level Data Tab
Education (over the past year)
Columns: U - W

Column U: Name of school/program

- E.g., Durham Tech Community College, Davidson University, Goodwill Culinary Arts Program

Column V: Degree/certificate title

- E.g., Associate of Arts in English, Masters in Counseling, Welding Certificate, GED

Column W: Full or part-time, number of hours

- List if the person is attending full or part-time
- List the number of class hours the individual is taking (if it is a degree track)

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True or false: Jobs that began before an individual received IPS services count in the ratings for diversity of jobs and employers.

True

False

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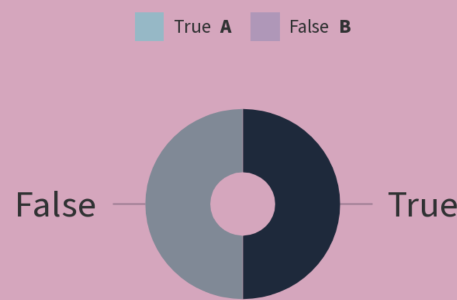
True or False: Only in-person contacts count in the ratings for rapid job search and time-unlimited follow-along supports.



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Why is it important to list the person's job duties?

A: Because a job title might mean very different things at different employers.

B: The diversity of job types is based on the person's job duties, not their job title.

C: Job titles do not give you very much information on their own.

D: All of the above.

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Questions?

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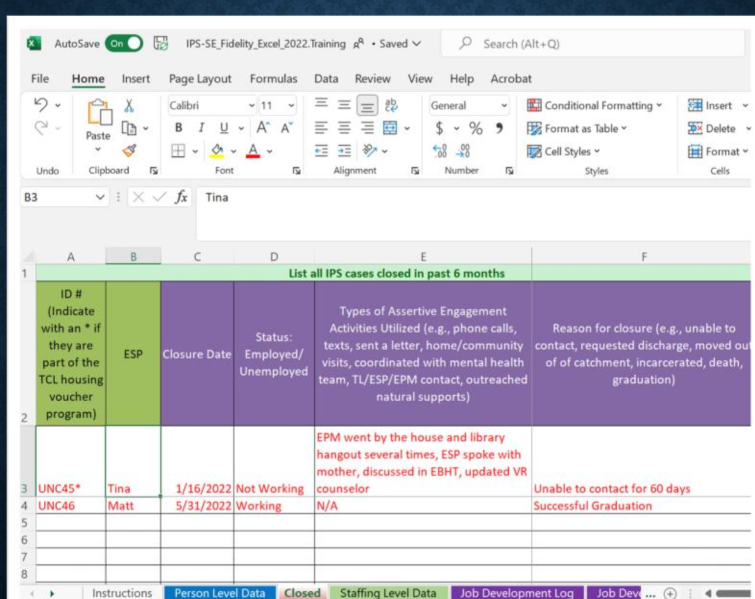

List all IPS cases closed in past 6 months					
ID # (Indicate with an * if they are part of the TCL housing voucher program)	ESP	Closure Date	Status: Employed/ Unemployed	Types of Assertive Engagement Activities Utilized (e.g., phone calls, texts, sent a letter, home/community visits, coordinated with mental health team, TL/ESP/EPM contact, outreached natural supports)	Reason for closure (e.g., unable to contact, requested discharge, moved out of of catchment, incarcerated, death, graduation)
UNC45*	Tina	1/16/2022	Not Working	EPM went by the house and library hangout several times, ESP spoke with mother, discussed in EBHT, updated VR counselor	Unable to contact for 60 days
UNC46	Matt	5/31/2022	Working	N/A	Successful Graduation

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Closed Tab Column A: Unique ID

Assign each person a unique ID

- **NOT** the medical record number because this is PHI!
- Easiest is to number 1,2,3….
  - Do **NOT** duplicate the same key from the Person Level Data tab; use different IDs.
  - Consider continuing where you left off on the Person Level Data tab
- Indicate with a * if the person has a TCL housing voucher

Provide a key that matches the names and the ID when evaluators arrive onsite

- This can be on the same document as the Person Level Data

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Closed Tab Columns: B - D

- Column B: ESP assignment
  - Enter the ESP assignment at the time of the data submission
- Column C: Closure Date
  - Enter the date the person is closed with the team (i.e., the team is NO longer serving this individual and has been discharged from IPS services)
- Column D: Employment status
  - Enter whether the person was employed or unemployed at the time of discharge.

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Closed Tab Column: E

Column E: Strategies used to assertively re-engage someone in services

- Use the list of examples provided column heading as a guide.
- Be specific!
  - 4 phone calls, 3 community visits, outreach by the ESP & EPM, met before OPT appointment
  - Called the person's mother, waited in the parking lot after the person was scheduled to work, 2 emails, 6 text messages, showed up for the medication management appointment
  - Went by the homeless shelter after 5pm, went to the library and McDonalds (where they hang out during the day), left a message with case manager, put a note in the EMR to contact ESP if person shows up for appointments

Used to calculate the ratings for assertive engagement.

This data can also to track strategies that did/did not work & to determine if all efforts went into assertively engaging someone before deciding to discharge the individual.

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Closed Tab Column: F

Column F: Reason for closure

- Use the list of examples provided in the column heading as a guide.
- Be specific!
  - Graduation
  - After several outreach attempts (see column E), discharged after 60 days of no contact.
  - Moved out of catchment area.
  - Requested discharge because no longer interested in work.

Used to calculate ratings for assertive engagement.

This data can also to track the reasons for disclosure and to determine if all efforts went into assertively engaging someone before deciding to discharge the individual.

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Why is it important to be specific about the types of assertive engagement strategies?

A: Because the evaluators asked for that level of detail.

B: It can be used to determine if the team has done their due diligence before discharging an individual who has not been engaging in services?

C: It is used for rating the assertive engagement fidelity item.

D: Both B & C

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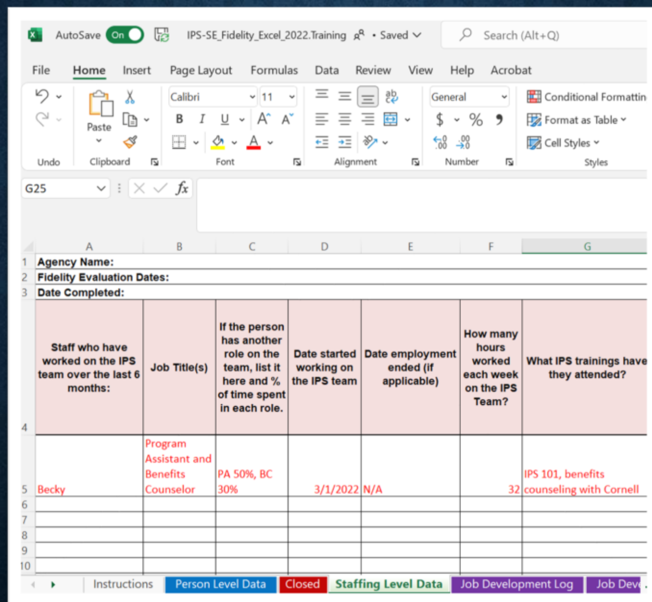

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Staffing Level Data Tab

01

Row 1

- List the agency name

02

Row 2

- List the fidelity evaluation dates

03

Row 3

- List the date the staffing tab was completed

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Staffing Level Tab Columns: A - C

Column A: Staff names

- List ALL the staff who have worked on the IPS team in the last 6 months
  - List full and part-time staff

Column B: Job Title

- List the job title(s) for each staff.
  - If the person serves 2 roles on the team, list both positions.

Column C: Time spent in role

- If the person has a split role, list the percent of time spent in each role.
  - ***This is used to calculate the number of weekly employer contacts per ESP.***

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Staffing Level Data Tab Columns: D - G

Column D: Start date	List the date each staff started working on the IPS team, **NOT** the agency.
Column E: End date (if applicable)	List the date the staff stopped working on the IPS team.
Column F: Number of hours worked each week	List the number of hours each staff is scheduled to work each week on the IPS team.
Column G: IPS Trainings attended	List all the IPS trainings each staff has attended.

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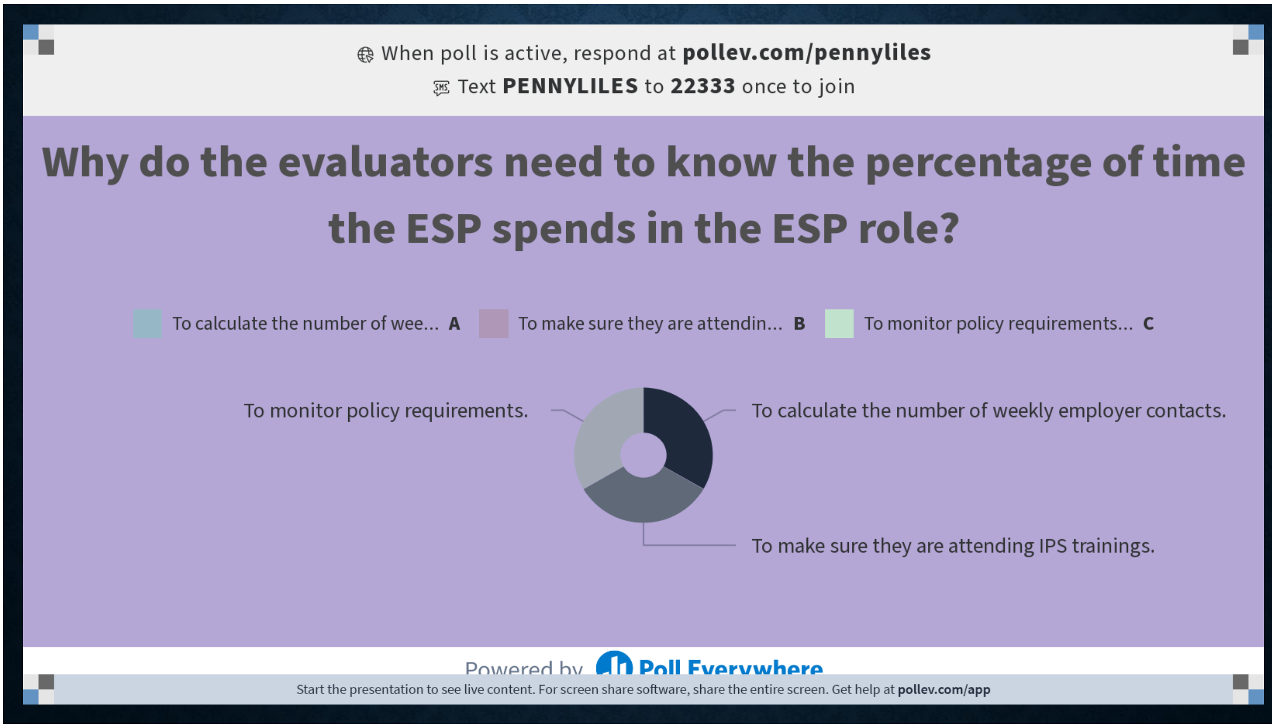
When poll is active, respond at pollev.com/pennyliles
Text PENNYLILES to 22333 once to join
Why do the evaluators need to know the percentage of time the ESP spends in the ESP role?
To calculate the number of wee... A
To make sure they are attendin... B
To monitor policy requirements... C
To monitor policy requirements.
To calculate the number of weekly employer contacts.
To make sure they are attending IPS trainings.
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ANY QUESTIONS?
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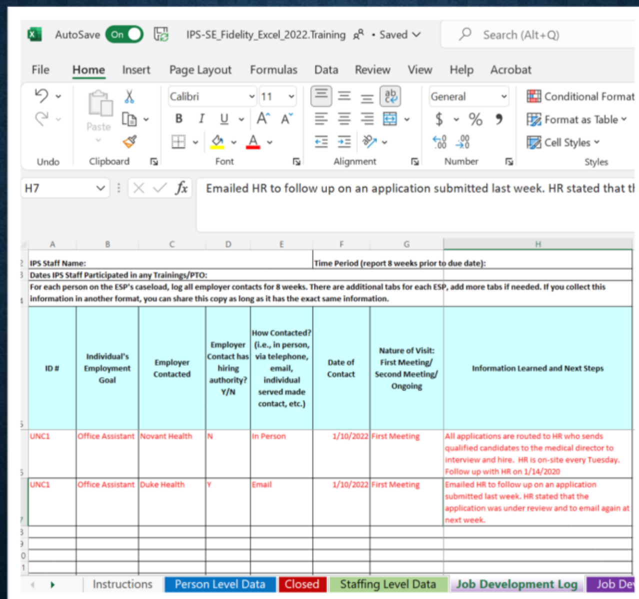

IPS Staff Name: | Time Period (report 8 weeks prior to due date):

Dates IPS Staff Participated in any Trainings/PTO:

For each person on the ESP's caseload, log all employer contacts for 8 weeks. There are additional tabs for each ESP, add more tabs if needed. If you collect this information in another format, you can share this copy as long as it has the exact same information.

ID #	Individual's Employment Goal	Employer Contacted	Employer Contact has hiring authority? Y/N	How Contacted? (i.e., in person, via telephone, email, individual served made contact, etc.)	Date of Contact	Nature of Visit: First Meeting/ Second Meeting/ Ongoing	Information Learned and Next Steps
UNC1	Office Assistant	Novant Health	N	In Person	1/10/2022	First Meeting	All applications are routed to HR who sends qualified candidates to the medical director to interview and hire. HR is on-site every Tuesday. Follow up with HR on 1/14/2020
UNC1	Office Assistant	Duke Health	Y	Email	1/10/2022	First Meeting	Emailed HR to follow up on an application submitted last week. HR stated that the application was under review and to email again at next week.

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Create a separate tab for every ESP on your team.

If a team lead is carrying a caseload of 5 or more, create a tab for the team lead as well.

When a team lead carries a caseload of 10 or more, they are included in the rating of this item.

If your agency has a report that includes the exact same information you can provide that report instead of completing the job development tab(s).

Job Development Tabs (Plural)

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Job Development Tab

Row 1

- 2 parts
  - 1) ESP Name
  - 2) Time period of job development logs (8 weeks)

Row 2

- List any PTO or trainings the ESP attended during the time frame
- Be sure to include specific dates
- ***This data is considered if the evaluators need to modify the total number of weeks provided.***

Consideration

- Depending on the staff member's full-time status, the number of weekly employer contacts might be prorated.

Job Development Tab Columns: A - B

Column A: Unique ID

- Use the same unique ID number assigned to the person from the Person Level Data tab so reviewers can cross reference the data.

Column B: Employment goal

- List the person's specific employment goal from the job search plan.

***These 2 columns are used in the ratings for individualized job search.

Job Development Tab Columns: C - F

Column C: Employer contacted
- List the employer/place of business contacted

Column D: Hiring Authority
- Write Y or N to indicate if the person contacted has hiring authority

Column E: Method of contact
- List how the ESP contacted the employer

Column F: Date of contact

Only in-person employer contacts (by the ESP or the ESP and the individual) with someone who has hiring authority count in the ratings for job development frequency.

Follow-along supports are **NOT** counted in the rating.

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Job Development Tab Column: G Nature Of Contact

First Meeting: the very first time you meet with the employer; introduction statement; asking for an appointment

Second Meeting: the second time you meet with an employer to learn about the business; returning for the appointment you scheduled on the first meeting; meeting with them for the first time for a more in-depth conversation (if they have time)

Third/Fourth Meeting: still developing the relationship, following up on an application, asking about an interview

Ongoing: there is an ongoing relationship with this employer, know the ESP by name, at the point where you can bring up hiring or they contacting when/if there is an opening

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Job Development Tab Column: H Information Learned & Next Steps

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- What did you learn from the employer? Be specific!
  - Set up an appointment on 10/15/22 at 10:00am to meet with the manager.
  - Gathered information about the position and application. Will talk with #5 next week to see if they are interested in applying for the position.
  - All hiring is done through HR which has a job fair the first Friday of every month at the Convention Center.
  - Truck days are Tuesdays and Thursdays; these are the busiest days, and the manager cannot speak. However, they need 1 person to help unload the trucks. Fill out an application online and call to follow-up on it.
  - Holiday hiring begins October 1st. All applications are paper. Bring in your application and be prepared to interview on the spot.

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True or False: Employer contacts made by phone are included in the number of weekly employer contacts.

True

False

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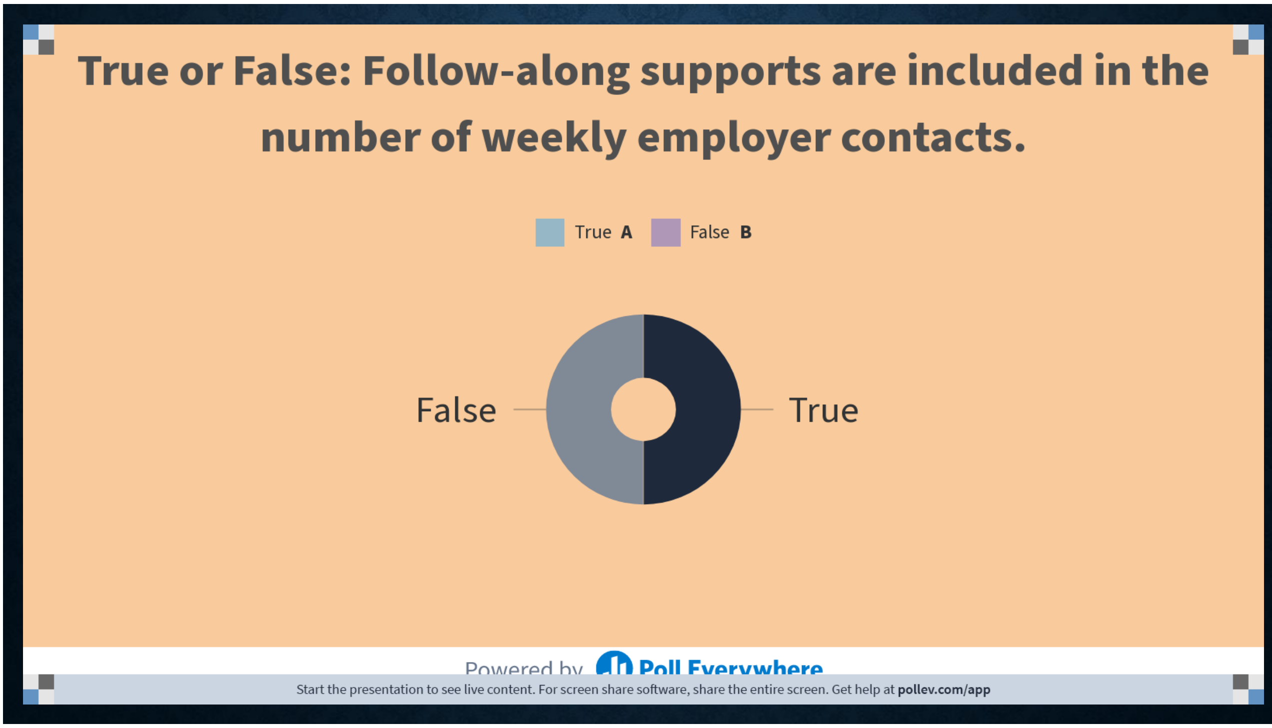
True or False: Follow-along supports are included in the number of weekly employer contacts.
True A
False B
False
True
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True or False: Use the same Unique ID for individuals on the Job Development tab as the Person Level Data tab.
True
False
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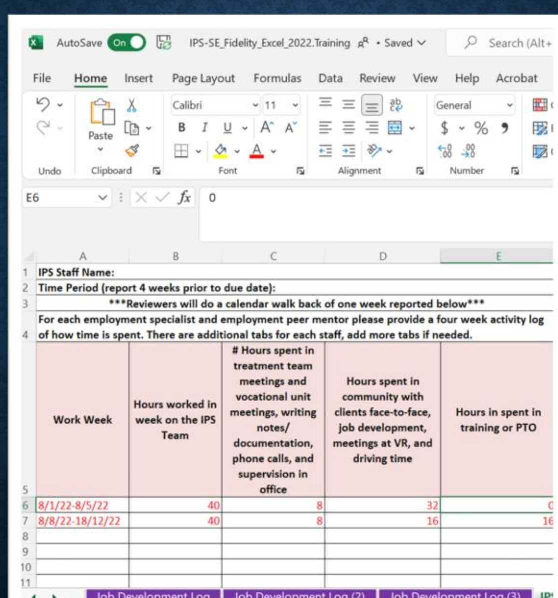

IPS Staff Name:

Time Period (report 4 weeks prior to due date):

Reviewers will do a calendar walk back of one week reported below

For each employment specialist and employment peer mentor please provide a four week activity log of how time is spent. There are additional tabs for each staff, add more tabs if needed.

Work Week	Hours worked in week on the IPS Team	# Hours spent in treatment team meetings and vocational unit meetings, writing notes/ documentation, phone calls, and supervision in office	Hours spent in community with clients face-to-face, job development, meetings at VR, and driving time	Hours in spent in training or PTO
8/1/22-8/5/22	40	8	32	0
8/8/22-18/12/22	40	8	16	16

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IPS Activity Log Tips

- Complete a tab for EACH ESP and EPM.
- Reviewers will do a calendar walk back of one week reported in this tab during the interviews.
- ***This data is used to calculate community-based time. Only ESPs are included in the ratings for community-based time.***

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IPS Activity Log Tab Rows

Row 1: IPS Staff

Row 2: Time period

- 4 calendar weeks prior to the due date of the spreadsheet

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IPS Activity Log Tab Columns: A - E

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- Column A: Dates of each of the 4 work weeks
- Column B: Total number of hours worked each week (this should be the tally of C+D+E).
- Column C: Number of hours spent in treatment team meetings, doing documentation, and in-office supervision for each week.
- Column D: Number of hours spent meeting in-person with individuals in the community, doing job development, meetings at VR, and driving time each week.
- Column E: Number of hours using PTO or in training each week.

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When poll is active, respond at **pollev.com/pennyliles**

Text **PENNYLILES** to **22333** once to join

True or False: EPMs are included in the ratings for community-based time.

True

False

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Using The Spreadsheet In Supervision

You mean it's not just for fidelity?

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Uses For Supervision

Tracking the number of people on each ESP's caseload

- Could use in monthly supervision

Tracking the first in-person ESP contact with an individual and the first in-person employer contact

- Subtract the number of days (e.g., employer contact date – first ESP contact=# of days). Use a formula to find the median.
- Find the median per ESP and the team as a whole
- Could use in monthly supervision or quarterly outcomes

Number of job/education starts per quarter

- Set goals for improvement per ESP and the team as a whole

Tracking follow-along support dates

- Are the ESPs mostly hitting it at each of the benchmarks?
- Could use in monthly supervision or quarterly outcomes

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Uses For Supervision

Diversity of jobs and employers

- Calculate percent of diversity of job types and employers quarterly
- Find the percent per ESP and the team as a whole

If someone has been in job search a while

- Review reasons why and review the job search plan

Graduation planning

- How long has the person been on the job? What supports do they still need?

Assertive engagement attempts and strategies

- Global list of what has been tried, by whom, along with dates
- Pay attention to any patterns
- Review min. 2x year (may need to be more often if noticing sig. engagement concerns)

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Supervision Tips

Update in monthly supervision	Use this data to review outcomes and set goals for the month or quarter
Utilize in the vocational unit meeting	Utilize your program assistant or staff who is organized and pays attention to details to update it Share data over time Celebrate successes
Consider saving a monthly copy	Way to track patterns and themes over time Easy way to find previous data when asked for it (because you know it is going to happen)

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Using Formulas in Excel (also lots of videos and information via web search)

- Sum
  - Total number in a column
    - =sum(B1:B5)
  - Subtraction for counting days
    - =sum(K5-E5)
- Median
  - Median days to first employer contact
    - =median(C4:C20)
- Average
  - Community based time
    - =average(M4:M8)
- Count if
  - Counting specific data sets
    - =countif(D5:D30,"ESP")

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Additional Columns

Add as many columns and tabs as you would like. However, for fidelity, we ONLY need the requested columns and tabs so send us a version without the additional data.

These columns are optional; these are additional ways to use the spreadsheet to track data.

- Referral date
  - Subtract the date of first ESP contact to see how long it takes to admit someone into IPS
- Referral source
  - Can follow up with the referral source if the ESP cannot reach the person
- Date of intake (if someone other than ESP is doing the intake)

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Additional Columns

Benefits counseling

- What type of benefits the person is receiving
- Date(s)of benefits counseling
- Help with reporting wages

Follow-along support dates

- Calculations: a week prior to a job start, within 3 days job start, # times weekly the first month
  - Percentage of each benchmark met for each ESP and the team as a whole
- Weekly follow-along support dates
- Monthly follow-along support dates

Education completion dates

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Additional Columns

- **Hours a week someone works**
  - Number less than 20 hours/week, 21-30 hours/week, 31+ hours/week
- **Promotions or pay raise at work**
  - Number people working $7.25-9/hour, $10-12/hour, etc.
- **VR or CORE Milestone number**
- **VR counselor**
- **Names of treatment providers (e.g., therapist, prescriber)**
- **Career profile start and completion date (for first draft)**

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Adding Rows And Tabs

- **Rows**
  - Someone is working at 2 jobs at the same time; make it clear that it is a second job for the individual
- **Tabs/Sheets**
  - Additional ESPs job development
  - Additional ESPs and EPMs community-based time
  - Benefits counseling tracking
    - Types of benefits receiving, benefits counselor, date of referral, date(s) of benefits counseling
  - VR Milestones
  - CORE Milestones
  - Administrative: authorization dates, release of information/consents, CCA dates

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The spreadsheet can be used in supervision in the following ways:

A: Calculate rapid job search

B: Track follow-along support dates

C: Review assertive engagement strategies

D: All of the above

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