

PA CSC Fidelity Scale: Score Sheet *(For Evaluation Team Use Only)*

FEP Program Site ID:

Date(s) of Visit:

Assessor:

Program Structure	/25
Staff Roles and Responsibilities	/30
Process and Clinic Flow	/45
TOTAL SCORE	/100

General Comments:


Program Structure			
Item #	Item	Description of Measure	Scoring
1	Program Length	Program offers services for: <ul style="list-style-type: none"> a. Specified period † † Number of years was altered to better capture Step Down programs (effective 2020)	Average (mean) of: <ul style="list-style-type: none"> a. 0 = None 1 = < 1 year; 2 = 1 year; 3 = 2 years; 4 = 2 years with Step Down Program or 2+ years; 5 = 2+ years with Step Down Program;
	NOTES: -		FINAL SCORE: <div style="border: 1px solid black; width: 60px; height: 60px; margin: 0 auto;"></div>
2	Inclusion/Exclusion	Evidence based inclusion/exclusion criteria are consistently defined for: <ul style="list-style-type: none"> a. Onset of psychosis* b. Diagnosis c. Age d. Catchment area e. Insurance accepted 	1 point each <i>*Critical: total score = 0 if (a) = 0</i>
	NOTES: -		FINAL SCORE: <div style="border: 1px solid black; width: 60px; height: 60px; margin: 0 auto;"></div>


3	Caseload	<p>Available participant appointments per week to therapist target ratio of 20:1 (calculated by the number of full-time licensed therapists divided by the total maximum number of available participant appointments per week at the time of fidelity testing). †</p> <p>†Caseload calculations were altered to better account for participants who do not require weekly appointments, such as those in Step Down (effective 2020).</p>	<p>Current Caseload per therapist:</p> <p>0 = 61+ 1 = 51-60; 2 = 41-50; 3 = 31-40; 4 = 21-30; 5 = 20 or less</p>
	NOTES: -		<p>FINAL SCORE:</p> <div style="border: 1px solid black; width: 60px; height: 60px; margin-left: auto; margin-right: auto;"></div>
4	Multidisciplinary Team	<p>Interdisciplinary team where each team member attends at least 75%* of team meetings with focus on case review (referrals, admissions & discharges, status updates and discussion of complex cases).</p>	<p>Team meetings are held:</p> <p>0 = never; 1 = once every 3 months; 2 = once a month; 3 = bi-weekly; 4 = weekly; 5 = weekly plus case conferences</p> <p><i>*Critical: If each team member does not attend at least 75% of team meetings, score will be 0.</i></p>
	NOTES:		<p>FINAL SCORE:</p> <div style="border: 1px solid black; width: 60px; height: 60px; margin-left: auto; margin-right: auto;"></div>

5	Crisis and Safety	FEP Program... <ul style="list-style-type: none"> a. Has 24/7 crisis services are available b. Provides participants with contact details for crisis services c. Crisis incidents are documented d. Conducts structured risk assessments e. Risk assessments are conducted regularly (at least once every 6 months) 	1 point each
	NOTES:		FINAL SCORE: <div style="text-align: center; border: 1px solid black; width: 60px; height: 60px; margin: 0 auto;"></div>

Program Staff Roles and Responsibilities

Item #	Item	Description of Measure	Scoring
6	Team Lead (Program Director or Coordinator)	Minimum licensed Master's Level Clinician located on-site* and conducts (or delegates) specified services including: <ul style="list-style-type: none"> a. Administrative functions (including staff performance goals, budgeting, etc.) b. Bi-weekly supervision to therapists, SEES and CPS c. Leading team meetings d. Program Evaluation data entry e. Management of clinic flow and staff hiring/training 	1 point each <i>*Critical: If position is not filled by certified or licensed professional located on-site, score will be 0</i>
	NOTES: -	FINAL SCORE: <div style="text-align: center; border: 1px solid black; width: 60px; height: 60px; margin: 0 auto;"></div>	



<p>7</p>	<p>Pharmacotherapy</p>	<p>Licensed psychiatrist or nurse practitioner located on-site (or, if satellite, attends team meetings), and provides specified pharmacotherapy services including:</p> <ul style="list-style-type: none"> a. Caseload does not exceed 125 per 1 FTE* b. Each participant has assigned psychiatrist/nurse practitioner c. Meets with at least 80% of participants monthly (if prescribed psychotropic medications; excluding Step Down participants) † d. Antipsychotic medication dosing (for 80% of participants) is within government approved guidelines for second-generation antipsychotic medications and between 300 and 600 Chlorpromazine Equivalents for first generation antipsychotic medications e. Side effects for 80% of participants prescribed psychotropic medication are assessed at least every 6 months using standardized assessment scales <p>†Step Down participants do not require monthly appointments and therefore will not be considered for provider appointment frequency (effective 2020).</p>	<p>1 point each</p> <p><i>*Critical: If position is not filled by licensed professional and caseload exceeds 125 per 1 FTE, score will be 0</i></p>
<p>NOTES:</p> <p>-</p>		<p>FINAL SCORE:</p> <div style="text-align: center; margin-top: 20px;">  </div>	

<p>8</p>	<p>Individual Therapy</p>	<p>Licensed or license eligible Master's Level Clinician or higher located on-site (or, if satellite, attends team meetings) and actively provides CBT based interventions*, including:</p> <ul style="list-style-type: none"> a. Each participant has assigned therapist(s) b. Meets with 80% of participants at least weekly (excluding Step Down participants) † c. Formal training occurred for a minimum 3 days d. Received or is receiving supervision or consultation from a qualified CBT trainer for 24 sessions e. Does work in the community <p>† Step Down participants do not require weekly appointments and therefore will not be considered for individual therapy appointment frequency (effective 2020).</p>	<p>1 point each</p> <p><i>*Critical: If position is not filled by licensed or license eligible Master's level clinician who actively provides CBT based interventions, score will be 0</i></p>
	<p>NOTES:</p> <p>-</p>		<p>FINAL SCORE:</p> <div style="text-align: center; margin-top: 50px;">  </div>

9	Physical Health and Wellness Professional	<p>Licensed nurse or other medical professional* located on-site (or, if satellite, attends team meetings) and provides specified services to promote wellness including:</p> <ul style="list-style-type: none"> a. Provides education on health and wellness to participants and their families b. Scheduling and tracking appointments for med checks c. Maintains contact with PCP, pharmacies or other involved providers as needed d. Administers medications (including Long Acting Injectables) e. Monitoring vitals and weight (specifically measures of metabolic syndrome) at least every 6 months for 80% of participants. † <p>† Lab work was previously required as part of the physical health monitoring requirements. Revision of policies as of 3/25/2020 specify that labs will be collected and monitored as directed by treating clinician and is not mandatory for Program Evaluation.</p>	<p>1 point each</p> <p><i>*Critical: If position is not filled by certified or licensed professional, score will be 0 (can be delegated to other staff, for example Psychiatrist)</i></p>
	NOTES:	FINAL SCORE:	<div style="border: 1px solid black; width: 60px; height: 60px; margin: 0 auto;"></div>

10	Supported Employment and Education (SEE)	<p>Minimum Bachelors Level SEE Specialist on-site (or, if satellite, attends team meetings) and provides specified services to assist and support to participants based on their goals toward education, employment or both including:</p> <ul style="list-style-type: none"> a. Received specialized training (IPS preferred) * b. Position is not delegated to another full-time team member c. Does work in the community (attends IEP meetings, job fairs, etc.) with or without participant d. Tracks and monitors progress of participants in SEE e. Meets with 50% of participants at least monthly 	<p>1 point each</p> <p><i>*Critical: If position is not filled by qualified and/or trained professional, score will be 0.</i></p>
	NOTES: -		<p>FINAL SCORE:</p> <div style="border: 1px solid black; width: 50px; height: 50px; margin-left: auto; margin-right: auto;"></div>
11	Case Management	<p>Minimum Bachelors Level Case Manager* located on-site (or, if satellite, attends team meetings) and provides specified services including:</p> <ul style="list-style-type: none"> a. Position is not delegated to another full-time team member b. Each participant has assigned case manager c. Sees that the appropriate appointments are made with other team members and/or other agencies in collaboration with the participant and with reference to the participants' treatment plan d. Assists the participant with administrative and social needs (housing, finances, legal, primary care, basic living skills etc.) e. Does work in the community 	<p>1 point each</p> <p><i>*Critical: If position is not filled by qualified and/or trained professional, score will be 0.</i></p>
	NOTES: -		<p>FINAL SCORE:</p> <div style="border: 1px solid black; width: 50px; height: 50px; margin-left: auto; margin-right: auto;"></div>

Process and Clinic Flow			
Item #	Item	Description of Measure	Scoring
12	Referrals	<p>Program follows up on every referral* in that:</p> <ul style="list-style-type: none"> a. Each referral and source of referral is documented b. Reason for ineligibility is documented for all ineligible referrals c. Complex clinical histories are discussed as a team and for at least 80% of referrals d. Initial screening occurs within 2 weeks of referral e. Eligibility decisions are made within 1 month of referral 	<p>1 point each</p> <p><i>*Critical: If program does not follow up on every referral, score will be 0.</i></p>
	NOTES:		<p>FINAL SCORE:</p> <div style="border: 1px solid black; width: 60px; height: 60px; margin: 20px auto;"></div>
13	Engagement	<p>Services are provided in a manner that promotes engagement and retention of participants including:</p> <ul style="list-style-type: none"> a. Services are flexible with times and locations b. Social Groups and/or peer support is available † c. Shared decision making documented for all services d. Inviting, age appropriate, non-medical environment e. Staff are in contact with other providers or agencies during times of crisis to ensure re-engagement and continuity of care <p>† Peer support and group meetings can be held virtually or over the phone due to COVID-19 modifications (effective 2020).</p>	1 point each

	NOTES:		FINAL SCORE: 
14	Family/Caregiver Involvement	<p>Inclusion and participation of family/caregiver such that at least 80% of participant-identified families:</p> <ul style="list-style-type: none"> a. Are involved in initial assessment b. Have treatment involvement assessed and documented c. Are contacted by at least one team member each quarter d. Have family therapy or multi-family group participation documented at least once every quarter † e. Have a Release of Information (ROI) signed by the participant if necessary <p>† Family therapy and groups can be held virtually due to COVID-19 modifications (effective 2020).</p>	1 point each
	NOTES:		FINAL SCORE: 

15	Admission	Intake process includes a comprehensive bio-psycho-social assessment of: <ul style="list-style-type: none"> a. Course and onset of psychotic symptoms b. Changes in functioning/behavior c. Individual and family psychiatric history d. Medical history e. Co-morbid substance use 	1 point each
	NOTES: -		FINAL SCORE: <div style="text-align: center; border: 1px solid black; width: 60px; height: 60px; margin: 0 auto;"></div>
16	Ongoing Assessment	Comprehensive bio-psycho-social assessment is completed at least every 6 months and includes: <ul style="list-style-type: none"> a. Educational and occupational functioning b. Social functioning c. Symptoms d. Psychosocial needs (housing, financial, etc.) e. Substance use 	1 point each
	NOTES:		FINAL SCORE: <div style="text-align: center; border: 1px solid black; width: 60px; height: 60px; margin: 0 auto;"></div>

17	Treatment Planning	<p>Individualized treatment plans are created and documented <i>with</i> the participant after initial assessment and:</p> <ul style="list-style-type: none"> a. Are updated at least every 6 months b. Identify needs and goals c. Identify preferences for services (pharmacotherapy, SE/E, substance abuse services, weight management assistance, social skills or community living skills, etc.) d. Outline a plan of action e. Assess previous plans for areas of improvement 	1 point each
	<p>NOTES:</p> <p>-</p>		<p>FINAL SCORE:</p> <div style="border: 1px solid black; width: 50px; height: 50px; margin-left: auto; margin-right: auto;"></div>
18	Outreach	<p>A system is in place for monitoring and tracking community outreach</p> <ul style="list-style-type: none"> a. Outreach materials are available and up to date* b. Designated outreach coordinator and all staff are trained to conduct outreach and provide uniform message c. Outreach visits occur at least monthly † d. Variety of organizations are targeted (not just inpatient units) e. Follow-up is conducted at least annually (in person or by phone/email) <p>† Outreach visits or events can be held virtually due to COVID-19 modifications (effective 2020).</p>	<p>1 point each</p> <p><i>*Critical: total score = 0 if (a) = 0</i></p>
	<p>NOTES:</p>		<p>FINAL SCORE:</p> <div style="border: 1px solid black; width: 50px; height: 50px; margin-left: auto; margin-right: auto;"></div>

19	Psychoeducation	<p>Psychoeducation is provided</p> <ul style="list-style-type: none"> a. For participants* b. For families/caregivers c. In groups to encourage support † d. Through formal sessions occurring at least 4 times per year e. Covering a range of topics relevant to FEP <p>† Groups can be held virtually for COVID-19 Modifications (effective 2020).</p>	<p>1 point each</p> <p><i>*Critical: total score = 0 if (a) = 0</i></p>
	NOTES:		<p>FINAL SCORE:</p> <div style="border: 1px solid black; width: 60px; height: 60px; margin: 0 auto;"></div>
20	Discharge	<ul style="list-style-type: none"> a. Participants are discharged from the program if (1) they have completed the determined program length, (2) they are no longer eligible (new date of onset, moved out of area, received a disqualifying diagnosis or change in insurance), or (3) the participant has disengaged (including no longer interested in services). * b. A working protocol is in place for handling discharge (including discharge due to disengagement) c. When possible a referral letter/formal discharge letter is provided to participant d. A warm handoff is made to appropriate provider e. Staff are aware of these discharge protocols 	<p>1 point each</p> <p><i>*Critical: total score = 0 if (a) = 0, (i.e. if discharges are made for reasons other than program completion, ineligibility or disengagement, score will be 0)</i></p>
	NOTES:		<p>FINAL SCORE:</p> <div style="border: 1px solid black; width: 60px; height: 60px; margin: 0 auto;"></div>

Recommendations:

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Caseload Calculations:

X FTE therapists per maximum number of FEP individual therapy appointments of X =

X FTE MD per caseload of X =

Individual Therapy Appointment Calculations:

FEP ID	Length in Program	# of Appts	Appts/Month	3+ per Month?

MD Appointment Calculations:

FEP ID	Length in Program	# of Appts	Appts/Month	1 per Month

SEES Appointment Calculations:

FEP ID	Length in Program	# of Appts	Appts/Month	1 per Month

COVID-19 Modifications and Impact on Fidelity

The impact of COVID-19 on FEP participants and families, as well as treating clinicians and staff is indisputable. The following offers a review of all areas of fidelity for discussion of modifications to care that may or may not have impacted scoring:

Item #	Item	COVID-19 Impact?	Notes
Program Structure			
1	Program Length	<input type="checkbox"/>	
2	Inclusion/Exclusion	<input type="checkbox"/>	
3	Caseload	<input type="checkbox"/>	
4	Multidisciplinary team	<input type="checkbox"/>	
5	Crisis and Safety	<input type="checkbox"/>	
Program Staff Roles and Responsibilities			
6	Team Lead	<input type="checkbox"/>	
7	Pharmacotherapy	<input type="checkbox"/>	
8	Individual Therapy	<input type="checkbox"/>	
9	Physical Health & Wellness Professional	<input type="checkbox"/>	
10	Supported Employment & Education (SEE)	<input type="checkbox"/>	
11	Case Management	<input type="checkbox"/>	
Process and Clinic Flow			
12	Referrals	<input type="checkbox"/>	
13	Engagement	<input type="checkbox"/>	
14	Family/Caregiver Involvement	<input type="checkbox"/>	
15	Admission	<input type="checkbox"/>	
16	Ongoing Assessment	<input type="checkbox"/>	
17	Treatment Planning	<input type="checkbox"/>	
18	Outreach	<input type="checkbox"/>	
19	Psychoeducation	<input type="checkbox"/>	
20	Discharge	<input type="checkbox"/>	

COVID-19 Modifications and Impact on Appointment Frequency

To evaluate the potential impact on participant appointment frequency as a result of COVID-19 impacts, a comparison of January – March 2020 (pre-COVID) will be compared to the most recent 3 months of appointments.

Individual Therapy Appointment Calculations (Jan – March 2020):

FEP ID	Length in Program	# of Appts	Appts/Month	3+ per Month?

MD Appointment Calculations (Jan – March 2020):

FEP ID	Length in Program	# of Appts	Appts/Month	1 per Month

COVID-19 Impact Summary:

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