

**Site Visit Interview Guide:
Client and Family Supplement**

OTNY Rater: _____

In Person/Phone: _____

Interview Date: _____

For Client Interview:

Client Initials: _____

For Family Member Interview:

Family Member Initials/relation to client: _____

Overview: This Client and Family Supplement is designed to be used in conjunction with the Fidelity Site Visit Interview guide. The suggested prompts can be used to gather information from clients and their family members about clinical practice items. The interview can be conducted in-person or over the phone and should be done during routine business hours.

Scoring: The information collected during the interviews, and the Data Report findings will inform the final scores recorded in the Fidelity Final Scores document.

Introduction Scripts:

For Clients:

Thank you for agreeing to talk with me. As you might know, your OnTrackNY program is part of a larger initiative to help young adults across the state. I work for the central office that organizes all OnTrackNY programs, and we want to hear from participants and learn about your experiences with the program and the team. Our aim is to better understand how the team is working together and providing services. Specifically, we would like to hear about your experiences in the past year, including how you and the team talk about needs and goals; make decisions together; and your experiences using the program's services. This conversation usually takes around 30 minutes. We can stop or take a break at any time. It is confidential and will not be shared with the team unless a safety issue comes up, for example if you report having thoughts of harming yourself or someone else. Do you have any questions before we begin?

For Family Members:

Thank you for agreeing to talk with me. As you might know, your OnTrackNY program is part of a larger initiative to help young adults across the state. I work for the central office that organizes all OnTrackNY programs, and we want to hear from participants and their families and learn about your experiences with the program and the team. Our aim is to better understand how the team is working together and providing services. Specifically, we would like to hear about your experiences in the past year, including how you, the team, and [family member's name] talk about needs and goals; make decisions together; and your experiences using the program's services. This conversation usually takes around 30 minutes. We can stop or take a break at any time. It is confidential and will not be shared with the team unless a safety issue comes up, for example if you report that you or [family member's name] are having thoughts of harming yourself or someone else. Do you have any questions before we begin?

Interview Questions:

When did you [your family member] start with OnTrackNY?

When did your family member start with OnTrackNY?

Managing Referrals (Domain 6):

6f. Scheduled Intake: If eligible and want to enroll in program, individuals are scheduled for an intake appointment with both PC and Prescriber within 1 week of eligibility determination (together or separately) *in the past year*.

Questions for clients: [for clients enrolled in the past year only] *If you can remember when you first started working with the team, did you feel that the process from first contact with the team until you were enrolled with the team was timely enough?*

Questions for families: [for family members of clients enrolled in the past year only] *If you can remember when your family member first started working with the team, did you feel that the process from first contact with the team until your family member was enrolled with the team was timely enough?*

Initial Assessment and Treatment Planning (Domain 12)

12d. Needs Assessment: Psychosocial needs are assessed for care plan: assess client and family preferences and incorporate into care plan needs related to: 1. Housing; 2. Employment; 3. Education; 4. Social support; 5. Finances; 6. Basic living skills; 7. Primary care access; 8. Social skills; 9. Family support; 10. Past trauma; 11. Legal issues *in the past year*.

Questions for clients: *When you first joined the OTNY program, did you and the team discuss your preferences and needs? For example, if you had any preferences or needs related to employment and education? Support from family and friends? Housing or finances? Or others?*

Questions for families: *When your family member first joined the OTNY program, did you and the team discuss your and your family member's preferences and needs? For example, any preferences or needs related to your family member's employment and education? Support from family and friends? Housing or finances? Or others?*

Care Processes (Domain 11)

11b. Core Processes: Clients report that the team is delivering person-centered care, using recovery principles, shared-decision making and cultural competency *in the past year*.

Questions for clients:

SDM: *How much effort has been made to help you understand your health issues? How much effort was made to listen to the things that matter most to you about your health issues? How much effort was made to include what matters most to you in choosing what to do next? Do you feel like you are involved in decisions that relate to your care (e.g. how often to meet with the team, where to meet with the team, what to focus on, etc.)? Did you watch the SDM videos or review any materials on SDM together e.g., information on SDM or decision aids?*

Person centered care: *Have you and the team discussed your personal goals? Have you discussed which OnTrackNY team members or services can be used to help you reach your personal goals?*

Cultural competency: *Have you and the team discussed your background and your identity? Have you discussed how it affects your understanding of your experience and your treatment choices? E.g. age, gender, sexuality, religion, communities, family structure*

Recovery principles: *Have you and the team had conversations to identify your personal strengths and*

your social supports? Have you talked about how those social supports can be involved in your treatment?

Questions for families:

SDM: How much effort has been made to help you understand your family member's health issues? How much effort was made to listen to the things that matter most to you about their health issues? How much effort was made to include what matters most to you in choosing what to do next? How has the team talked about shared decision making, or the process of making decisions with the team? Have you reviewed any videos or materials on shared decision making?

Person centered care: Have you discussed which OnTrackNY team members or services can be used to help your family member reach their personal goals? Do you feel like your family member is involved in decisions that relate to their care (e.g. how often to meet with the team, where to meet with the team, what to focus on, etc.)?

Cultural competency: Have you or your family member discussed cultural background with the team and how it affects your and your family member's understanding of their experience and their treatment choices?

Recovery principles: Have you and the team had conversations to identify your family's personal strengths and your social supports? Have you talked about how those social supports can be involved in your family member's treatment?

Team Integration ((Domain 2):

CRITICAL ITEM

2a. Team-Based Approach: At least 50% of clients meet with 2 or more team members representing at least 2 of the following roles: PC, Prescriber, SEES, Peer Specialist, and Nurse in a given quarter during the past year *for each quarter in the past year.*

Questions for clients: Which team members have you meet with in the past year? [For each team member] How often did the meetings happen?

Questions for families: Which team members have you met with in the past year? [For each team member] How often did the meetings happen?

Flexibility of Services (Domain 8)

8b. Scheduling: Staff schedule shows availability of office time outside of 9am to 5pm for the scheduling of routine appointments (hours outside of 9-5 can be regularly scheduled, as-needed, or via phone) *at least once monthly in the past year.*

Questions for clients: If you've needed it, has the team offered availability for appointments outside of 9am to 5pm? Have there been times when you would have liked an appointment outside of regular business hours but the team was not available?

Questions for families: If you've needed it, has the team offered availability for appointments for you or your family member outside of 9am to 5pm? Have there been times when you would have liked an appointment outside of regular business hours but the team was not available?

Working with Families (Domain 21)

Family Participation: Interviews (with PCs, clients and families) and client records indicate that client preferences are discussed (at admission and follow-ups) and the PC offers meetings with the families. For those who agree frequency and content reflect client and family preferences *in the past year.*

Questions for clients: Did the team ask you if you wanted your family involved in your treatment? If so, did they ask how you wanted your family to be involved? In what ways have they offered to involve your family in treatment services? In what way have they involved your family in making decisions about

treatment, for example, medication?

Has your family been involved in your treatment and if so, how?

Questions for families: Have you been involved in your family member's treatment and if so, how? Did the team ask you about your needs and preferences in working with the team? Did the team discuss with you how you could be involved in your family member's treatment? Did the team offer to provide you with information, support, and/or resources if you wanted any of these?

Crisis Services (Domain 10):

CRITICAL ITEM

10a. Crisis Services: Team is involved in providing live (in-person/phone) crisis support or coordinating linkages to crisis services to manage crises on a timely basis *for each quarter in the past year*.

Questions for clients: If you might need it, do you know how to reach the team to help support you in a crisis?

Questions for families: Do you know how to reach the team to help support your family member in a crisis if needed?

10c. 24/7 Availability: Team provides 24/7 phone access to clients and families and the policy is posted at the site in a location visible to clients/family members and distributed to each client *in the past year*.

Questions for clients: Do you have 24/7 access to the team for crisis support? Has the team explained to you how you could reach someone in the event of a crisis at night or on the weekend?

Questions for families: Do you have 24/7 access to contact the team if your family member is having a crisis? Has the team explained to you how you could reach someone in the event of a crisis at night or on the weekend?

Psychoeducation (Domain 17)

Psychoeducation: Interviews with providers, clients and client records indicate that Primary Clinicians are using psychoeducation routinely in care *in the past year*.

Questions for clients: Did the team provide you with information about psychosis, or mental health more generally? Did you feel like you got the information you wanted? Did you have an opportunity to ask questions?

Questions for families: Did the team provide your family member with information about psychosis, or mental health more generally?

Client Preferences and SDM (Domain 15):

CRITICAL ITEM

15a. Psychotropic Medications: Prescribers and clients use SDM and client preferences are considered when exploring medication decisions *in the past year*.

CLIENTS ONLY Questions for clients: Do you and your prescriber talk about your preferences for medication? Do you and your prescriber make decisions about medication together? Do you feel like your preferences are considered when making medication decisions? How do you make these decisions together?

Cognitive Behavioral Therapy/Motivational Enhancement-Based Interventions (Domain 18)

CBT Interventions: Interviews with Primary Clinicians, clients and client records indicate that Primary Clinicians are using empirically-validated CBT-based interventions to match client problems based on client preferences *in the past year*.

CLIENTS ONLY Questions for clients: Does your PC help you practice how to handle real life situations you

care about? Help you get along better with your friends? Help you talk with your family about your thoughts and feelings?

Do you and your primary clinician talk about coping skills you can use to help manage and cope with feelings or experiences? Does your PC use any worksheets or other materials that you review together during these conversations? Do you do activities together to practice coping skills? Do you do activities on your own? After practicing coping skills, do you and your clinician talked about how things went, what was helpful and what wasn't?

Substance Use Treatment (Domain 19)

Substance Use Treatment: For clients who indicate substance use, there is evidence from interviews with Primary Clinicians that they use Motivational Interventions/Shared Decision Making/ Harm Reduction strategies *in the past year.*

Questions for clients: *Has your PC talked with you about any concerns you might have about your use of drugs or alcohol? If relevant, how do you and your PC talk about your decisions about using substances? Have you discussed strategies for reducing or avoiding substance use, or reducing the harm that can come from substance use?*

Questions for families: *Has your PC talked with you about any concerns you might have about your family member's use of drugs or alcohol? If relevant, has the team discussed strategies for reducing or avoiding substance use or reducing the harm that can come from substance use?*

Thank you Scripts:

For Clients and Family Members:

We've reached the end of the interview. Your input has been really valuable and I appreciate you taking the time to talk with me. If you have any follow-up questions, feel free to contact me at this number [or provide number / email]. Thank you.

For Family Members:

We've reached the end of the interview. Your input has been really valuable and I appreciate you taking the time to talk with me. If you have any follow-up questions, feel free to contact me at this number [or provide number / email]. Thank you.