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First Episode Psychosis Services Fidelity Scale (FEPS-FS 1.0) and Manual

Addington, Donald E.

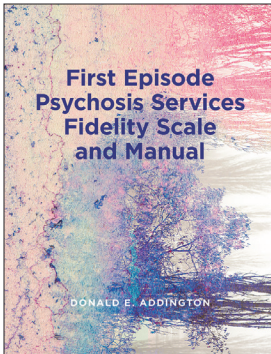
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FIRST EPISODE PSYCHOSIS SERVICES FIDELITY SCALE AND MANUAL

by Donald E. Addington

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APPENDIX B: HEALTH RECORD REVIEW

Health Record Abstractor: _____
Program: _____
Date(s) of Health Record Review: _____

Instructions: The health record review should be completed before the staff interviews. The abstractor should return the completed checklist to the Fidelity Rater.

Health record selection. Two samples of health records should be selected.

The first sample is selected according to the following criteria:

1. 10 randomly chosen health records of
2. patients with a Schizophrenia Spectrum Disorder
3. who have attended the program for at least one year

The second sample is selected according to the following criteria:

1. Patients enrolled in program
2. Last five who were admitted to hospital

The health record review will require four hours or less for abstractors who are familiar with the record organization. The FEP program team leader should ensure the abstractor is familiar with the record organization (e.g., through a meeting of the abstractor with a staff member who is familiar with the records and can orient the abstractor).

The fidelity team will hold a one-hour training session with the site's health record abstractor prior to the review and a one-hour debriefing after the completion of the review.

The review of the first one or two health records may take longer to complete. After completing the review on two health records, the target time to complete each health record is expected to be no more than 15 minutes. If the abstractor cannot locate the information for a component within five minutes, record that component as missing and give no credit.

Components should not be rated according to a practitioner discipline; for example, the psychoeducation component includes all sessions or meetings regardless of which team member provides the psychoeducation.

The fidelity assessment team will determine the scoring of some of the components, such as determining whether medication doses are in the acceptable range. The health record abstractor's responsibility is to record health record information.

To share comments about the rating of individual components or how to improve the manual, please write in the comments section at the bottom.

Health Record Review Checklist

FEPS-FS-1.0 components	Response format	Possible evidence	Health Record #																						
			1	2	3	4	5	6	7	8	9	10													
4. Assigned Case Manager/Care Coordinator	Yes No	Health Record initial assessment																							
14. Timely Contact with Referred Individual	Number of days from date of referral to 1st appointment	Health Record																							
15. Family Involvement in Assessment	Yes No	Assessment or notes																							
16. Comprehensive Clinical Assessment - All 9 components included in assessment ⁽ⁱ⁾	Check which of 9 components completed	Assessment or progress notes or structured assessment	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1			
			___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2		
			___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	
			___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	
			___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	
			___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6
			___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7
			___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8
			___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9
17. Comprehensive Psychosocial Needs Assessment - 8 or more components included in needs assessment ⁽ⁱⁱ⁾	Check which of 9 items completed	Assessment or progress notes or structured assessment	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1		
			___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	
			___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	___ 3	
			___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	___ 4	
			___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	___ 5	
			___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6	___ 6
			___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7	___ 7
			___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8	___ 8
			___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9	___ 9
18. Clinical Treatment Plan/Care Plan After Initial Assessment: addresses clinical and psychosocial needs. If treatment/care plan present, mark 1 at right. If patient signs off on plan, mark 2 at right.	Yes No	1: Plan present 2: Patient signs off on plan	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1	___ 1			
			___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	___ 2	

FEPS-FS-1.0 components	Response format	Possible evidence	Health Record #																						
			1	2	3	4	5	6	7	8	9	10													
19. Antipsychotic Medication Prescription	Yes No	Indicated in psychiatrist note or copy of prescription																							
20. Antipsychotic Dosing within Guidelines for Individuals with Psychosis - at 6 months	Yes No	Medication																							
		Daily dose																							
20. Second antipsychotic medication prescribed at 6 months	Yes No	Medication																							
		Daily dose																							
22. Patient Psychoeducation: received 12 episodes by trained clinician (individual or group)	Yes No	Patient notes or group attendance																							
23. Family Education and Support: received 8 sessions by trained clinician (individual or group format)	Yes No																								
26. Annual Comprehensive Assessment: addresses 7 areas of functioning ⁽ⁱⁱⁱ⁾	Yes No	Annual assessments on file OR clear descriptions of review of 1-7 components in progress notes	___1	___1	___1	___1	___1	___1	___1	___1	___1	___1	___1	___1	___1	___1	___1	___1	___1	___1	___1	___1			
			___2	___2	___2	___2	___2	___2	___2	___2	___2	___2	___2	___2	___2	___2	___2	___2	___2	___2	___2	___2	___2		
			___3	___3	___3	___3	___3	___3	___3	___3	___3	___3	___3	___3	___3	___3	___3	___3	___3	___3	___3	___3	___3	___3	
			___4	___4	___4	___4	___4	___4	___4	___4	___4	___4	___4	___4	___4	___4	___4	___4	___4	___4	___4	___4	___4	___4	
			___5	___5	___5	___5	___5	___5	___5	___5	___5	___5	___5	___5	___5	___5	___5	___5	___5	___5	___5	___5	___5	___5	
			___6	___6	___6	___6	___6	___6	___6	___6	___6	___6	___6	___6	___6	___6	___6	___6	___6	___6	___6	___6	___6	___6	___6
			___7	___7	___7	___7	___7	___7	___7	___7	___7	___7	___7	___7	___7	___7	___7	___7	___7	___7	___7	___7	___7	___7	___7
NB: Components 33 and 34 are rated on the basis of data abstracted from health records of last five patients admitted to hospital after joining the program.																									
33. Communication between FEP and Inpatient Services	Yes No	Documentation supports each of the 6 items	___1	___1	___1	___1	___1															-			
			___2	___2	___2	___2	___2																		
			___3	___3	___3	___3	___3																		
			___4	___4	___4	___4	___4																		
			___5	___5	___5	___5	___5																		
			___6	___6	___6	___6	___6																		

FEPS-FS-1.0 components	Response format	Possible evidence	Health Record #											
			1	2	3	4	5	6	7	8	9	10		
34. Timely Contact after Discharge from Hospital: patient in FEP service seen for face-to-face contact with FEP service provider within two weeks of discharge from hospital	Yes No		___1	___1	___1	___1	___1							

- i. **Component 16** should include at least 8 of 9 items: (1) Time course of symptoms, change in functioning, and substance abuse (assessing whether there was change in functioning correlated with substance use changes or other changes); (2) Recent changes in behavior; (3) Risk assessment/harm to self or others; (4) Mental status exam; (5) Psychiatric history; (6) Premorbid functioning; (7) Co-morbid medical illness; (8) Co-morbid substance use; (9) Family history.
- ii. **Component 17** should include all 9 items: (1) Housing; (2) Employment; (3) Education; (4) Social support; (5) Financial support; (6) Primary care access; (7) Family Support; (8) Past trauma; (9) Legal.
- iii. **Component 26** should include all 7 areas: (1) Educational; (2) Occupational functioning; (3) Social function; (4) Symptoms; (5) Psychosocial needs; (6) Risk assessment of harm to self or others; (7) Substance use.
- iv. **Component 33** should include all 6 items: (1) Contact inpatient unit to establish communication plan; (2) Visit with patient on inpatient unit; (3). Communicate with family about admission; (4) Involved in discharge planning process; (5) Receive/obtain a hospital discharge summary; and, (6) Schedule outpatient appointment prior to discharge.

FEPS-FS-1.0 components abstracted from Health Record	Abstractor's comments
FEPS-FS-1.0 components	
4. Assigned Case Manager/Care Coordinator	
14. Timely Contact with Referred Individual	
15. Family Involvement in Assessment	
16. Comprehensive Clinical Assessment - All 9 items included in assessment	
17. Comprehensive Psychosocial Needs Assessment - All 9 items included in care plan	
18. Clinical Treatment Plan/Care Plan After Initial Assessment that addresses clinical and psychosocial needs.	
19. Antipsychotic Medication Prescription	
20. Antipsychotic Dosing within Recommendations for Individuals with Psychosis at 6 months	
22. Patient Psychoeducation	
23. Family Education and Support	
24. Cognitive Behavior Therapy	
26. Annual Comprehensive Assessment	
33. Communication between FEP and Inpatient Services	
34. Timely Contact after Discharge from Hospital	

