

**Mental Health Agency**  
**IPS Supported Employment Fidelity Action Plan**  
**Date**

<b>Fidelity Item</b>	<b>Report Score</b>	<b>Anticipated Score</b>	<b>Method to Achieve Goal</b>	<b>Date</b>	<b>Person(s) Responsible</b>

**Mental Health Agency**  
**IPS Supported Employment Fidelity Action Plan**  
**Date**


<b>Previous Score:</b>	
<b>Points to Gain:</b>	
<b>Anticipated New Score:</b>	





**Oregon Supported Employment Center for Excellence (OSECE)  
Individual Placement and Support (IPS) Supported Employment (SE) & Supported Education (SEd)  
Fidelity Review Preparation Guide**

*OSECE staff will conduct a fidelity review for each combined IPS SE & SEd programs annually. Please follow the guidelines below to prepare for the fidelity review.*

**Before the IPS SE & SEd Fidelity Review:**

**One Month Prior To the Review Date:**

- Assign a contact person and provide contact information to OSECE.
  - Usually the IPS SE & SEd supervisor.
- Prepare the schedule of the fidelity review (please see examples below).
  - If needed, OSECE staff can assist with fidelity schedule development.

**Two Weeks Prior To the Review Date:**

- Send the fidelity review schedule to OSECE staff.
- Schedule a brief call to discuss the agenda and any important details about the review.
- Reserve a room or private area to conduct interviews and/or review charts. Include two or three computers with access to medical records or notify reviewers if they will need to bring laptops.

*OSECE reserves the right to cancel and reschedule the fidelity review if not provided an agenda in advance or if key staff are not available.*

**Please organize and deliver the following items to OSECE before the start of the IPS SE & SEd fidelity visit:**

- Please ensure logins and access to charts.
- Blank copy of agency intake, assessment and treatment plan forms
- Current caseload list for each employment & education specialist that shows which mental health team each client is primarily served by
- Access to IPS SE & SEd client complete MH charts, including closed charts
- Agency and IPS SE & SEd program brochures
- IPS SE & SEd quarterly performance goal
- Copy of the agency quality assurance plan showing the IPS SE & SEd goals that uses results of the fidelity assessment to improve SE & SEd implementation.

- Fidelity action plan
- Examples of client's work and educational shared success stories (newsletter, website, newspaper, staff meeting notes)
- Notes from IPS SE & SEd steering committee meetings or advisory board meetings
- Tracking of IPS SE & SEd staff time spent in community
- Any written material or meeting minutes from the Executive Director about goals for IPS SE & SEd, and how IPS SE & SEd fits into the mission of the agency

<i>Specific Documentation needed for both SE &amp; SEd</i>	
<b>Supported Employment</b>	<b>Supported Education</b>
<input type="checkbox"/> A list of where clients are currently working that includes: employer, job types, job start date, and end date. If fewer than 10 jobs are currently held by clients then provide a list of jobs held for the past 6 months.	<input type="checkbox"/> A list of where clients are currently taking classes, education types (Example: AA with focus in Art or BS-Psychology Major and Math minor), start date and end dates of each educational experience
<input type="checkbox"/> Copy of employer contact logs (job development logs) for last 6 months	<input type="checkbox"/> Copy of Educational contact logs for the last 6 months
<input type="checkbox"/> Number of clients employed across entire agency and evidence that the data was collected quarterly and shared agency wide at least once a year	<input type="checkbox"/> Educational outcomes (e.g. enrollment, class attendance, grades, etc.) are measured on a quarterly basis and evidence that this data was shared with agency leadership and staff.
<input type="checkbox"/> 12 months tracking for IPS client intake, first employer contact, and closure dates	<input type="checkbox"/> 12 months of tracking for SEd client intake, first educational contact and closure dates
<input type="checkbox"/> <b>Recommended:</b> SE Supervision notes, job development field mentoring forms, VR tracking, Benefit Counseling tracking, any other relevant program policies or data.	<input type="checkbox"/> <b>Recommended:</b> SEd Supervision notes, educational field mentoring notes, VR tracking, financial aid tracking, any other relevant program policies or data.

## Fidelity Visit Activities:

- Provide time at start of day one to deliver program data, review the agenda, and to introduce reviewers to the electronic health record and/or charts. Please provide login information and a brief tour of the electronic record.
- Please assure that the reviewers are scheduled for a one hour, non-working lunch and a short break each day.
- Address/room number where the review will occur.
- Phone number for IPS Supervisor or other person coordinating the review.
- Names and job title of the agency staff that will be interviewed.

## Elements To The Review Schedule:

- Observation of a multidisciplinary team meeting (**1 hour**).
  - Reviewers can observe one treatment team meeting if there are less than three teams at the agency, and can observe two team meetings if there are four or more treatment teams referring to the IPS SE program.
- Group interview of a few members of the agency's executive leadership, including the Executive Director. For instance, the Executive Director, QA Director and Clinical Director (**45 minutes-1 hour**).
- Interview the Psychiatrist or the Medical Director (**15 minutes**).
- Interview the IPS Supported Employment & Supported Education Supervisor (**60 minutes**).
- Observation of IPS Supported Employment & Supported Education group supervision meeting (**1 hour**).
  - If the IPS SE & SEd unit meeting doesn't occur on the days that the review is scheduled, can it be rescheduled to occur during the review? If these are typically two separate meetings, please add time for a review to observe the SEd meeting.
- Interview at least three Case Managers/Therapists together (**1 hour**).
  - *Please schedule different Case Managers/Therapists from the previous fidelity visit. This interview will include SE and SEd services.*
- Interview with Vocational Rehabilitation (VR) Counselor and/or VR Supervisor who is working with the IPS SE & SEd programs (**30 minutes**), in person or by phone.
- Interview SE & SEd family members together (**45-60 minutes**) *prefer a group meeting face to face, but the interviews can be conducted by phone individually.*
- Optional exit interview (**30 minutes**).

<i>Please schedule these items for both SE &amp; SEd</i>	
<b>Supported Employment</b>	<b>Supported Education</b>
<input type="checkbox"/> Observe at least two Employment Specialists conducting job development appointments ( <b>1 hour to 90 minutes each</b> ).	<input type="checkbox"/> Observe at least one Education Specialist conducting an educational contact appointment ( <b>1 hour to 90 minutes each appointment</b> ).
<input type="checkbox"/> Interview Employment Specialists as a group ( <b>90 minutes</b> ).	<input type="checkbox"/> Interview of Education Specialists as a group ( <b>90 minutes</b> ).
<input type="checkbox"/> Interview a small group of clients (4-8 people) who have received IPS Supported Employment services ( <b>45-60 minutes</b> ).	<input type="checkbox"/> Interview a small group of clients (4-8 people) who have received Supported Education services ( <b>45-60 minutes</b> ).
<input type="checkbox"/> Chart reviews of people who have received IPS Supported Employment services. List of all current working clients, and/or clients who have worked in the last 6 months, list of all IPS client start dates, and list of clients closed from IPS in last 12 months. ( <b>10-12 total hours</b> ). <i>Reviewers require access to all IPS client charts. <b>If possible please schedule all charts reviews to occur in one block of time.</b></i>	<input type="checkbox"/> Chart reviews of people who have received Supported Education services. List of all clients currently enrolled in school, and/or clients who have been enrolled in school in the last 6 months, list of all SEd client start dates, and list of clients closed from SEd in last 12 months. ( <b>4-6 total hours</b> ). <i>Reviewers require access to all SEd client charts. <b>If possible please schedule all charts reviews to occur in one block of time.</b></i>
<input type="checkbox"/> Interview Work Incentive Counselor or Benefits Counselor ( <b>15 minutes</b> ) in person or by phone.	<input type="checkbox"/> Interview financial aid Advisor or TRIO Counselor ( <b>15 minutes</b> ) in person or by phone.

**\*Please see pages 5-9 for sample Fidelity Review schedules.**

(Agency Name) Fidelity Review 2017  
 Location: (Address with suite numbers if applicable)  
 IPS Supervisor: (Name & phone number)

**Example 1, page 1**

<b>Day One: Tuesday (date)</b>			
<b>Time &amp; Location</b>	<b>Reviewer 1</b>	<b>Time &amp; Location</b>	<b>Reviewer 2</b>
<b>8:00–8:15</b> Meet in Lobby:	Getting settled –orientation to building, Review Agenda	<b>8:00–8:15</b> Meet in Lobby:	Getting settled –orientation to building, charts, etc.
<b>8:15–8:45</b> Conference Room 202	Electronic Health Records review of how to access charts, etc.	<b>8:15–8:45</b> Conference Room 202	Electronic Health Records review of how to access charts, etc.
<b>8:45–9:45</b> Room 303	Case Manager Interviews – Interviewees: <ul style="list-style-type: none"> <li>• Name – Case Manager (Team)</li> <li>• Name – Case Manager (Team)</li> <li>• Name – Therapist (Team)</li> </ul>	<b>8:45–9:45</b> Room 101	Supported Employment & Education Team Meeting
<i>9:45 – 10:00</i>	<i>Break</i>	<i>9:45 – 10:00</i>	<i>Break</i>
<b>10:00–11:00</b> Room 101	Multidisciplinary Team Meeting (Teams Represented: )	<b>10:00–10:30</b> Room 202	WIN Interview <ul style="list-style-type: none"> <li>• Name – Work Incentives Coordinator               <ul style="list-style-type: none"> <li>○ Phone interview – Number</li> </ul> </li> </ul>
		<b>10:30–11:00</b> Room 202	Review Documentation
<b>11:15–12:00</b> Executive Conference Room 401	Executive Team Interview Interviewees: <ul style="list-style-type: none"> <li>• Name – Clinical Director</li> <li>• Name – QA Director</li> <li>• Name – Executive Director</li> </ul>	<b>11:00–12:00</b> Room 303	Interview Supported Education Specialist Interviewees: <ul style="list-style-type: none"> <li>• Name – Supported Education Specialist</li> <li>• Name – Supported Education Specialist</li> </ul>
<i>12:00–1:00</i>	<i>Lunch</i>	<i>12:00 – 1:00</i>	<i>Lunch</i>
<b>1:00–5:00</b> Room 202	Chart Reviews	<b>1:00–5:00</b> Room 202	Chart Reviews

(Agency Name) Fidelity Review 2017  
 Location: (Address with suite numbers if applicable)  
 IPS Supervisor: (Name & phone number)

**Example 1, page 2**

**Day 2: Wednesday (Date)**

<b>Time &amp; Location</b>	<b>Reviewer 1:</b>	<b>Time &amp; Location</b>	<b>Reviewer 2:</b>
<b>8:30 – 9:30</b> Room 303	ACT Team Meeting	<b>8:30–9:00</b> Room 202	VR Interview <ul style="list-style-type: none"> <li>• Name – Counselor</li> <li>• Name – Counselor</li> </ul>
		<b>9:00–9:45</b> Room 101	SEd Participant Interviews:
<i>9:30 – 9:45</i>	<i>Break</i>	<i>9:45 – 10:00</i>	<i>Break</i>
<b>9:45–11:00</b> Community College	Education Contact Development (Service & name of contact)	<b>10:00-10:30</b> Medical Directors office: 256	Medical Team Interview – Interviewee: <ul style="list-style-type: none"> <li>○ Name – Medical Director/Psychiatrist</li> </ul>
<b>11:00-11:30</b> Community College	Interview Financial Aid Advisor: Interviewee: <ul style="list-style-type: none"> <li>• Name – Title</li> </ul>	<b>10:30-12:00</b> Meet in Lobby	Job Development: (Name of Specialist)
<i>12:00 –1:00</i>	<i>Lunch</i>	<i>12:00–1:00</i>	<i>Lunch</i>
<b>1:00–1:45</b> Room 101	SE & SEd Family Interviews: Number attending	<b>1:00-1:45</b> Room 303	SE Participant Interviews: Number attending
<b>2:00–5:00</b> Room 202	Continue Chart Reviews	<b>2:00–5:00</b> Room 202	Continue Chart Reviews

(Agency Name) Fidelity Review 2017  
 Location: (Address with suite numbers if applicable)  
 IPS Supervisor: (Name & phone number)

**Example 1, page 3**

Day 3: Thursday (Date)			
Time & Location	Reviewer 1	Time & Location	Reviewer 2
8:30–10:00 Room 303	Employment Specialist Interviews <ul style="list-style-type: none"> <li>• Name – Employment specialist</li> <li>• Name – Employment specialist</li> <li>• Name – Employment specialist</li> <li>• Name – Employment specialist</li> </ul>	8:30–10:00 Supervisor’s office: Room 256	SE & SEd Supervisor Interview
10:00 – 10:15	<i>Break</i>	10:00– 10:15	<i>Break</i>
10:15-11:45 Room 202	Finish Chart Reviews/ review of documentation Or depending on size Job Development	10:15-11:45 Meet in Lobby	Job Development: (Name Of Specialist)
11:45-12:00 Room 202	Reviewer Debrief		
12:00-1:00	<i>Lunch</i>		
1:00-1:30 Room 202	Exit Interview: SE & SEd Supervisor		

(Agency Name) Fidelity Review 2017  
 Location: (Address with suite numbers if applicable)  
 IPS Supervisor: (Name & phone number)

**Example 2, page 1**

**Day One: Tuesday (date)**

**All Reviewers: 8:00 – 8:15:** Meet in Lobby:  
 Getting settled: orientation to building, Review Agenda, etc.

**All Reviewers: 8:15-9:00:** Location:  
 Electronic Health Records review of how to access charts, etc.

Time & Location	Reviewer 1	Time & Location	Reviewer 2	Time & Location	Reviewer 3
<b>9:00–10:00</b> Location:	Observe IPS & SEd Team Meeting Names:	<b>9:00–9:30</b> Location:	Interview VR Counselor Name:	<b>9:00–10:00</b> Location:	Review of Documentation
		<b>9:30-10:00</b> Location:	Interview Benefits Counselor Name:		
<i>10:00–10:30</i>	<i>Break &amp; Document Review</i>	<i>10:00–10:30</i>	<i>Break &amp; Document Review</i>	<i>10:00-10:30</i>	<i>Break &amp; Document Review</i>
<b>10:30–12:00</b> Location:	Interview SE Specialists Name: Location:	<b>10:30–11:30</b> Location:	Interview Clinicians (Case Managers & Therapists) Names & Titles:	<b>10:30-12:00</b> Location:	Interview SE & SEd Supervisor
		<b>11:30-12:00</b> Location:	Interview Psychiatrist Name:		
<i>12:00 -1:00</i>	<i>Lunch</i>	<i>12:00–1:00</i>	<i>Lunch</i>	<i>12:00-1:00</i>	<i>Lunch</i>
<b>1:00–2:00</b> Location:	Observe Clinical Team Meeting	<b>1:00–5:00</b> Location:	Chart Reviews	<b>1:00–2:00</b> Location:	Executive Team Interview Interviewees: <ul style="list-style-type: none"> <li>• Name – Clinical Director</li> <li>• Name – QA Director</li> </ul> Name – Executive Director
				<b>2:00–5:00</b> Location:	Chart Reviews

(Agency Name) Fidelity Review 2017  
 Location: (Address with suite numbers if applicable)  
 IPS Supervisor: (Name & phone number)

**Example 2, page 2**

<b>Day 2: Wednesday (Date)</b>					
<b>Time &amp; Location</b>	<b>Reviewer 1:</b>	<b>Time &amp; Location</b>	<b>Reviewer 2:</b>	<b>Time &amp; Location</b>	<b>Reviewer 3:</b>
<b>9:00–10:00</b> Location:	SE & SEd Family Member Interviews Names:	<b>9:00–10:00</b>	SE Client Interviews Names:	<b>9:00-10:00</b> Location:	SEd Client Interviews Names:
<i>10:00-10:15</i>	<i>Break</i>	<i>10:00-10:15</i>	<i>Break</i>	<i>10:00-10:15</i>	<i>Break</i>
<b>10:3 -12:00</b> Community	Job Development:	<b>10:30-11:00</b> College	Interview Financial Aid Advisor:	<b>10:30–12:00</b> Community	Job Development: Name:
		<b>11:00-12:00</b> College	Ed Education Contact Development Names:		
<i>12:00–1:00</i>	<i>Lunch</i>	<i>12:00- 1:00</i>	<i>Lunch</i>	<i>12:00-1:00</i>	<i>Lunch</i>
<b>1:00-4:00</b> Location:	Chart Reviews	<b>1:00-4:00</b> Location:	Chart Reviews	<b>1:00–2:00</b> Location:	Supported Education Specialists Interview Names:
				<b>2:00-4:00</b> <i>Location:</i>	Chart Reviews
<b>4:00-4:30</b> Location:	Reviewer Debrief				
<b>4:30-5:00</b> Location:	Exit interview				

# Oregon Integrated SE-SED Fidelity Scale Score Sheet

<b>Staffing</b>	<b>Item</b>	<b>IPS</b>	<b>SEd</b>
1.	Caseload size	Score:	Score:
2.	Employment/Education services staff	Score:	Score:
3.	IPS- Vocational generalists	Score:	
	SEd- Education generalist		Score:
<b>Org.</b>	<b>Item</b>	<b>IPS</b>	<b>SEd</b>
1.	Integration of rehabilitation with mental health thru team assignment	Score:	Score:
2.	Integration of rehabilitation with mental health thru frequent team member contact	Score:	Score:
3.	Collaboration between employment/education specialists and Vocational Rehabilitation counselors	Score:	Score:
4.	SE/SEd unit	Score:	Score:
5.	Role of employment/education supervisor	Score:	Score:
6.	Zero exclusion criteria- SE & SEd	Score:	Score:
7.	IPS- Agency focus on competitive employment and education	Score:	Score:
8.	Executive team support for SE/SEd	Score:	Score:
<b>Services</b>	<b>Item</b>	<b>IPS</b>	<b>SEd</b>
1.	Work incentives planning	Score:	Score:

# Oregon Integrated SE-SED Fidelity Scale Score Sheet

	Educational Financial Planning		Score:
2.	Disclosure	Score:	Score:
3.	Ongoing, work-based vocational assessment	Score:	
	Ongoing educational assessment		Score:
4.	Rapid search for competitive job	Score:	
	Rapid linkage to educational activities		Score:
5.	Individualized job search	Score:	
	Individualized pre-enrollment planning and services		Score:
6.	Job development—Frequent employer contact	Score:	
	Educational development- Frequent educational resource contact		Score:
7.	Job development—Quality of employer contact	Score:	
	Educational resource development		Score:
8.	Diversity of job types/educational participation	Score:	Score:
9.	Diversity of employers	Score:	
9.	Educational Progress		Score:
10.	Competitive jobs	Score:	
	Mainstream educational programs		Score:
11.	IPS- Individualized follow-along supports	Score:	
	SEd- Individualized follow-along supports		Score:
12.	IPS- Time-unlimited follow-along supports	Score:	

# Oregon Integrated SE-SED Fidelity Scale Score Sheet

	SEd- Time-unlimited follow-along supports		Score:
13.	Community-based services- SE & SEd	Score:	Score:
14.	Assertive engagement and outreach by integrated treatment team- SE & SEd	Score:	Score:
	<b>Total:</b>	Score:	Score: