

**Polk County Mental Health & Disability Services Region**

# **2022 Integrated Services**

**Outcomes Evaluation**



## **LAW, HEALTH POLICY & DISABILITY CENTER**

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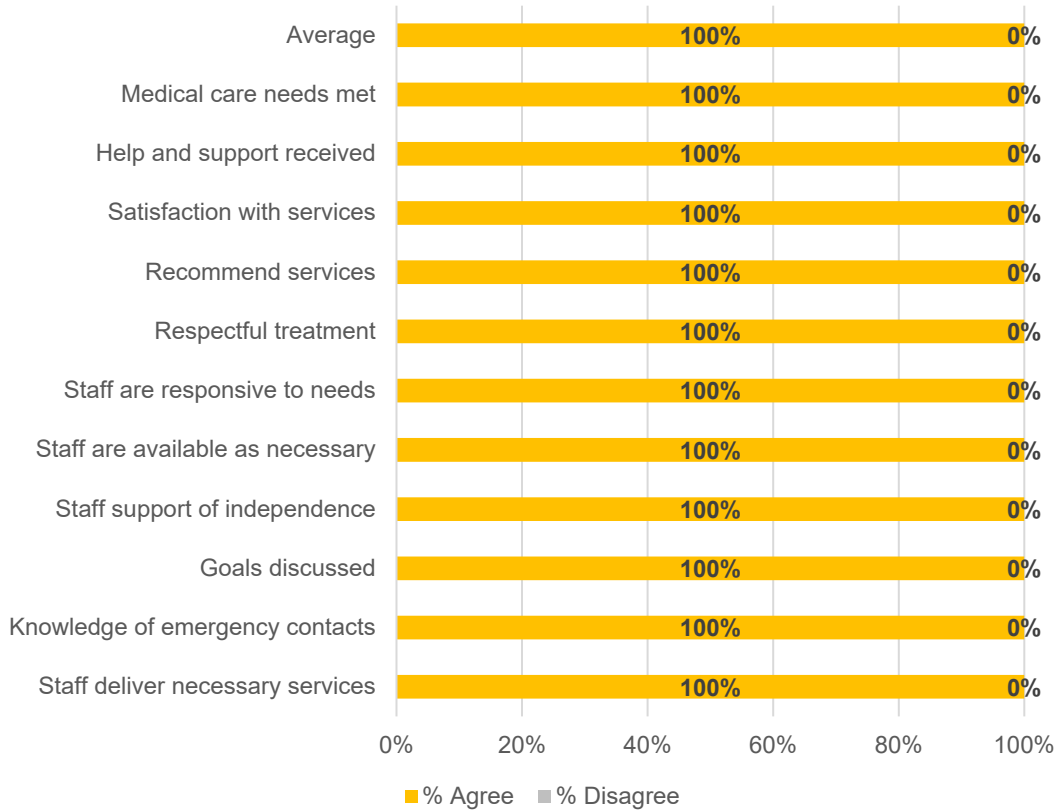
Appendix A: Agency Level Summaries

**Broadlawns**

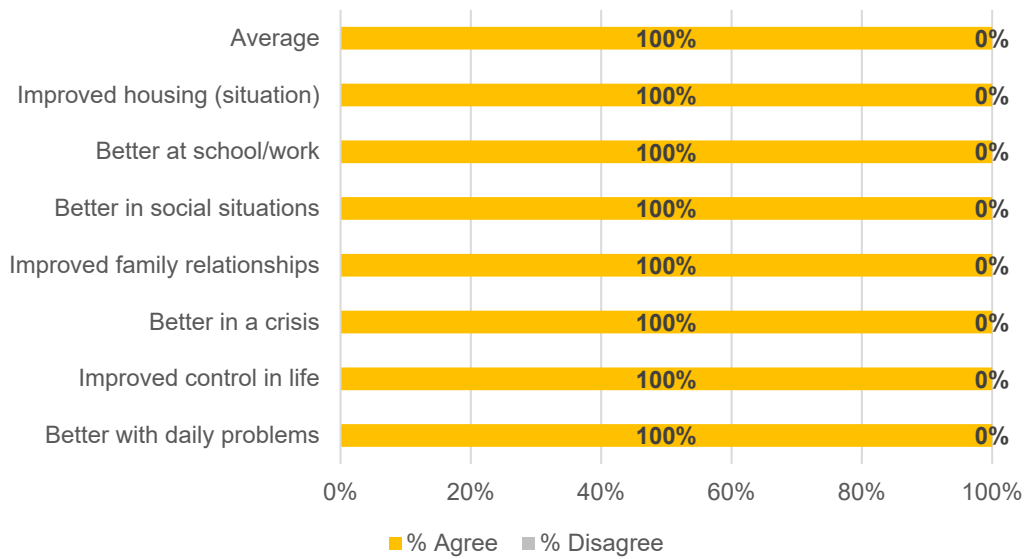
Table 1. Broadlawns Performance by Outcome 2020-2022

	2020		2021		2022	
	Performance	Score	Performance	Score	Performance	Score
Housing	97%	4	97%	4	95%	4
Engaged Toward Employment	69%	4	59%	4	28%	3
Working Toward Self-Sufficiency	23%	3	23%	3	19%	3
Education	46%	4	44%	4	53%	4
Access to Somatic Care	98%	3	95%	3	96%	3
Community Inclusion	76%	2	66%	2	76%	2
Participant Empowerment	60%	1	87%	2	100%	4
Negative Disenrollment	0.00%	4	0.00%	4	0.00%	4
Hospital Bed Days	1.5	4	3.1	3	3.12	3
Emergency Room Visits	0.00	4	0.01	4	0.00	4
Involvement in the Criminal Justice System	5.2	1	2.37	3	5.37	1
Homelessness	2.31	1	4.81	1	6.28	1
Participant Satisfaction	99%	4	98%	4	100%	4
Quality of Life	100%	4	94%	3	100%	4
Family and Concerned Other Satisfaction	90%	3	93%	3	83%	1
Administrative Outcomes	85%	1	91%	2	93%	3
Agency Overall Performance	73%	2	77%	3	75%	3

**Broadlawns Participant Satisfaction Results by Item (N=15)**



**Broadlawns Quality of Life Results by Item (N=15)**



## Broadlawns Participant Comments (N=15)

### Services Delivered Effectively

*They support me in my rehabilitation from drugs, and they support me in my medication, and anything I need. They're always there for me.*

*Yes, they're very responsive. They help within like 20 or 30 minutes ...sometimes less than that.*

*Yes, definitely, they are helpful for getting to appointments, safe transportation, and show you how to ride the Dart buses. [They are] easy to meet and a schedule with.*

*I couldn't seem to manage my money very well. They got someone to help me to budget my money and now I know what bills need to be paid, how much money I have in the bank, how much in my pocket.*

*They help me with transportation to doctors' appointments, and to my payee's once a week, and to the grocery store. And while I'm in the car they ask me how I'm doing, and they check up on me and they take me to my psychiatrist, and they talk to them. They are very helpful.*

*I had a drinking issue there for a while, and [staff] was going with me to AA and has gone to a couple of meetings with me for a while. They have a newsletter that they send out with activities and events so that I can meet other clients and meet them and socialize and learn better socialization.*

### Positive Relationships with Agency or Staff

*The one-on-one ...and they're there for me. I can depend on them. And I can trust them.*

*[Staff] just knows when I just need to vent. Like when they just need to let me say what I need to say. They know what I need and when I need it.*

*They're always there for me, I know that. I have their personal cell phone number and call them at home. They answer for me. They're a very helpful supportive person and makes my life better. I couldn't get my phone to work before. I was seeing my mom before she died, and they told me to come to the office and typed out directions for how to get there.*

*They don't like talk down to me or make me feel like I'm less ...and they're always very respectful.*

### Positive Impacts of Services

*Yeah, I'm more able to be more sociable. People used to make me nervous and now I'm able to be more relaxed and talk with people.*

*My mental health is a lot more stable than what it was, and I don't feel like I'm on a dead-end road now. I don't put things off anymore.*

*The confidence to talk to people and be in social situations has improved. There were a few years where I wouldn't leave the house.*

*They helped me to communicate and to be open and honest. And I think my family has a better understanding of my behavioral health issues now and are more prominent in my life now.*

*I feel comfortable and safe*

### Concerns



*[Staff] listened but would dismiss things because they didn't know how to deal with difficult stuff because they had a privileged life. That's part of why I got switched to [another staff]. [Said staff] doesn't always answer the phone.*

## **COVID-19**

*They took me to get my shots for COVID. Well, I needed someone to tell me to quit watching the news because it was [scaring me]. And my case manager would call and ask me how I was doing and check up on me. They helped me not to be paralyzed anymore and to get back to being able to function. They helped me come out of that.*

*With the pandemic I didn't have in-person visitation to my nurse practitioner. So, they help me do three-way calls for us all to talk.*

*No activities recently because of the pandemic. The trips and activities really haven't come back*

*Yeah, we talked on the phone two or three times a week instead of once in-person.*

*They all wore masks and got me all of my shots. They couldn't go to the office anymore, but they'd still come see me with the masks and take me where I still needed to go.*

## **Suggestions**

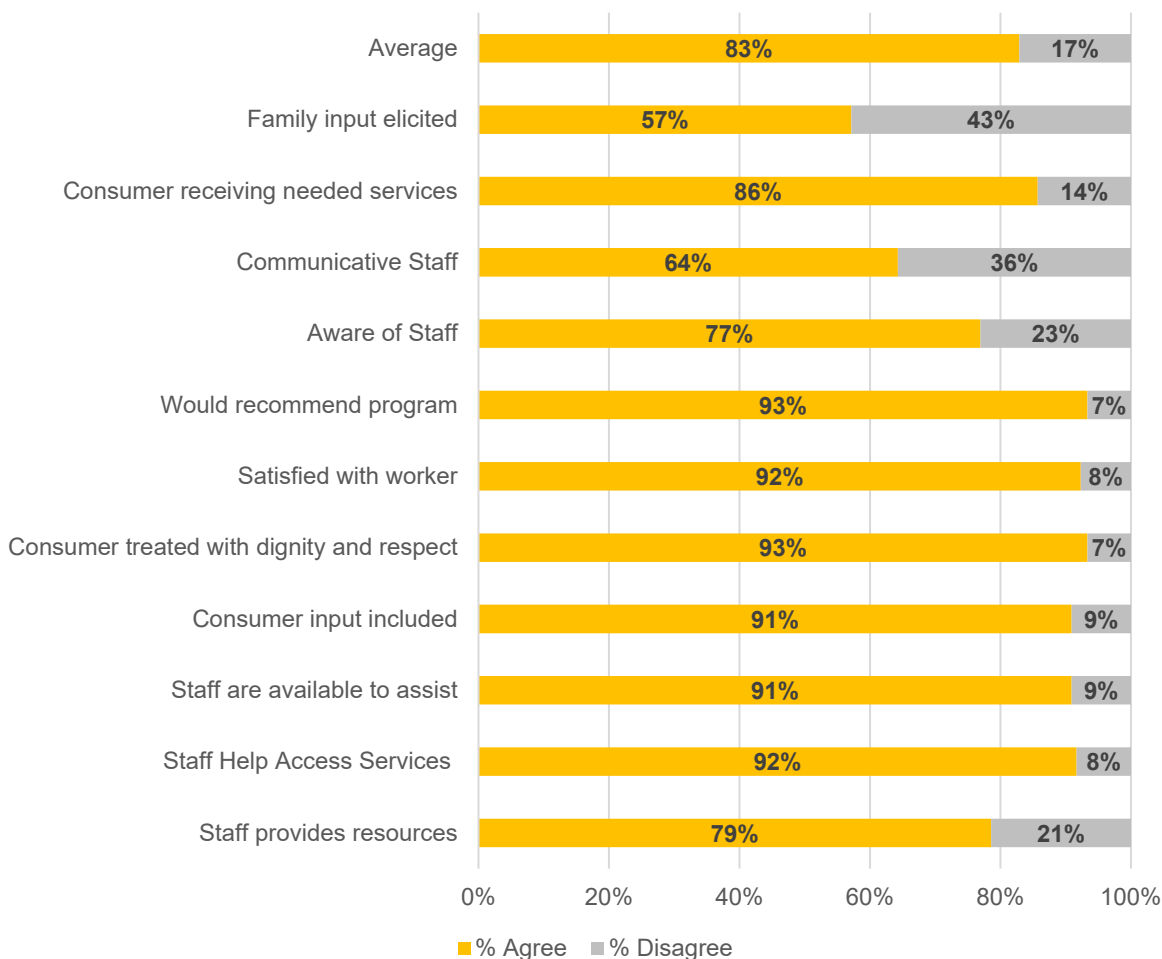
*[I would change] that they work longer hours, past 2:00PM, so if I need a ride somewhere they would be more available.*

*Make it so they don't have such high caseloads.*

*I think they should go back to having the trips out of town. I went to Saint Louis with the PATH program, and it was a three-day trip. We stayed at college dorms in St. Louis and went to the zoo, baseball game, and the Arch.*

*More activities within the program.*

**Broadlawns Concerned Other Satisfaction Results by Item (N=15)**



**Broadlawns Concerned Other Comments (N=15)**

**Services Delivered Effectively**

*If [participant] needs anything they will tell me what program to go to, route to go, and who to speak with. They're worth their weight in gold. I feel so comfortable with them and they're always there to talk. If they don't have time, they will always call me back.*

*[Staff] helped [participant] with Medicaid, and finding out where they could get meals, because I'm not able to cook for them [participant] all the time.*

*[Staff] actually helped us find this place that we are in. [Staff] takes [participant] to their doctor's appointments and stays there with them when they're in doctor's appointments. If either one of us needs help with the light [or] energy program, they have every year, [staff] looks the numbers up for me.*

*[Staff] helps keep [participant] out of trouble and helps them stay on their meds.*

*They've been very good. [Participant] has someone who comes in to help with grass and laundry. And when their furnace went out, they had someone who was able to come in and help with that. Even when [participant's] husband passed away, they rallied around them. The funeral arrangement[s], they went above and beyond.*

### **Positive Relationships with Agency or Staff**

*They have a long history of working together in PATH and they've built a strong relationship.*

*If we send out an S.O.S., [staff] is there. And if [staff] can't be there, they makes sure we can still get help. They're just wonderful. They need four raises.*

*[Participant] likes the [staff] and the services. [Participant] looks forward to them and they share things with them that they don't with me. [Participant] is really happy with the [staff] that contact them.*

### **Positive Impacts of Services**

*[Participant has] become more stable with their mental health, and they've become more successfully housed. I would also say as a mother of someone with mental illness, it's really nice to have a middle person for working with my [child]. It's difficult to advocate and work with your [child] sometimes because they're my [child]. It's like a conflict of interest.*

*Yes, they are. [Participant is] getting help with their mental health, their substance abuse, and staying clean and sober ...and maintaining a clean apartment.*

*So, we were able to get a Section 8 voucher and get their own apartment. [Staff have] been able to stabilize [participant's] mental health and they also have a stronger relationship with their [child].*

*Most recent[ly,] there was a problem with their caretaker, and [staff] helped with that. [This program] keeps them from being institutionalized.*

*They're still in their home and they're able physically and mentally to travel and do the things they want to do. They've flown to [city name] to see their favorite niece. Mentally they feel free and not bogged down. They don't have worries or think the world will shut them down or put them where they don't want to be. They feel safe and confident.*

### **Concerns**

*I ask them to call. And I pay a [person] to come in to help [Participant] shower and do laundry and get clean before they go to any appointments. So, I ask them to please tell me so I can make sure [Participant] gets help and the [person will] get there and [Participant] will say, 'oh, they called and canceled' and like ridiculous things. [Participant] should qualify for food stamps and get food pantry and get those things delivered and [staff] never did any of that for us. [Another staff] took it upon themselves to do all of that. And my sister and I [have called the original staff] many times and they never picked up or returned any calls.*

*They had to go to the emergency room when they went to the doctors [about their diabetes. And their blood test was so bad they were rushed to the hospital]. [Participant] doesn't even know how to test their blood or check their inulin. And [Participant] is so nice. They never want to put anybody out or get anyone in trouble and hurt anybody's feeling. They don't even want to report [staff]. I can't even tell you how many times the ball got dropped and nobody shows up to take them. [I have the emails and text messages as evidence.]*

*No, I don't at all. They're not helping [participant] with housing and they're not helping them with anything. They're not telling them the programs they can be involved in, and they're not helping them get into the services. [Participant] needs help and their workers need to be involved: like call them every day or every other day and get them. [Participant is] supposed to be in [a traditional provider's services and they haven't done that].*

## **COVID-19**

*In the last year or two, I haven't been satisfied but, I think a lot of that had to do with the pandemic and having to restart the program.*

*I feel like it's not fair to talk about the last year or two. Everything was up in the air. [Before the pandemic] it was just perfect. Everything was taken care of. Their medical was scheduled and taken care of. But nothing happened in the last two years. That's not [staff's] fault. What they could do they did do. And they went over and above.*

*Yes, I think so. They were pretty responsive throughout the whole time. [Participant] saw them pretty frequently. I know that*

*Not when they were shut down, but once they were able to open up and come and take them to their doctor's appointments safely, yes. They had to wear masks and stuff when they picked them up. Thankfully, they've lifted the mandates for most things recently.*

## **Suggestions**

*Well, they'll never do anything because they'll never make any changes ever. And if they did, they would fire all the people who are horrible and hire people who actually want to make changes. It would be nice if [the participant] could have a social worker who could actually do something or care, so [the participant] didn't feel so bad.*

*They need to have one worker for each person and not a whole group. When you have one person then they're all you got to deal with. When there's a whole group, then you don't know who you're going to have to deal with.*

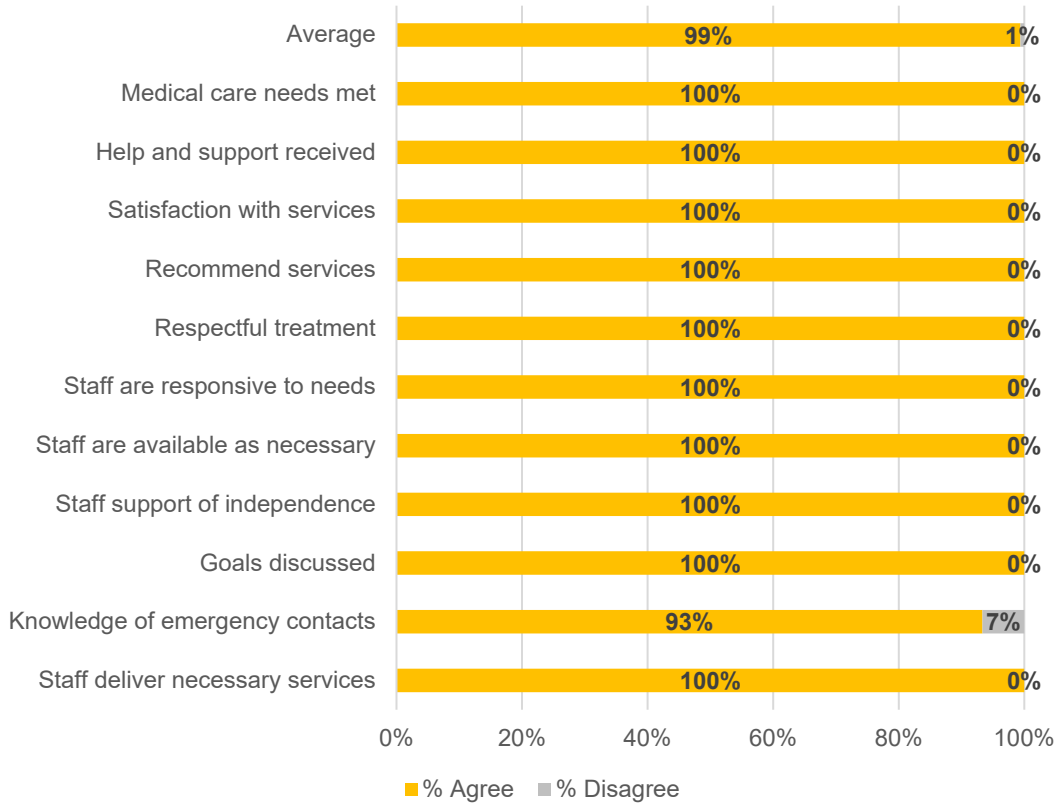
*They need to help [participants] a lot more than they do.*

# CSA

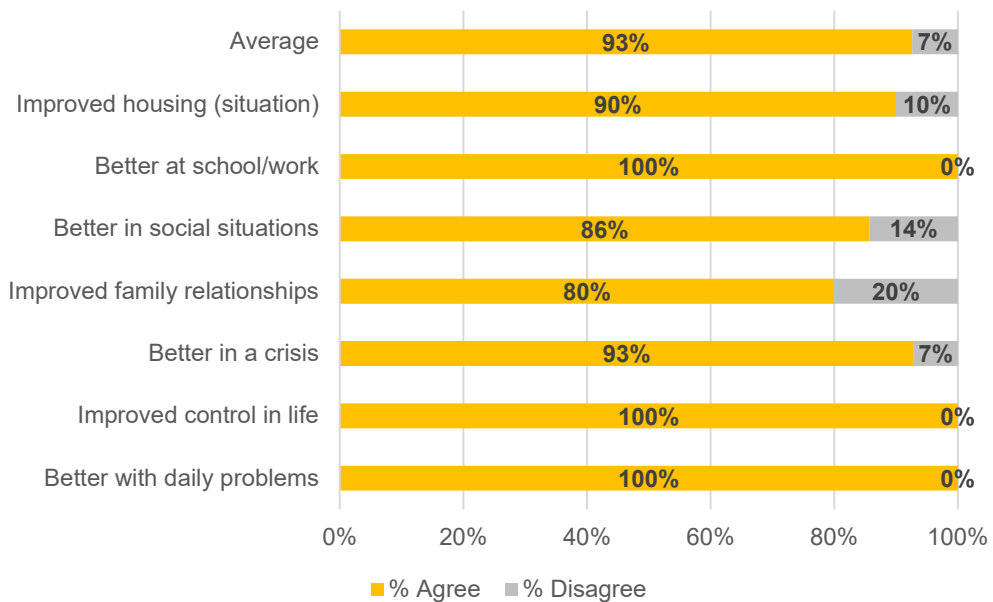
Table 2. CSA Performance by Outcome 2020-2022

	2020		2021		2022	
	Performance	Score	Performance	Score	Performance	Score
Housing	90%	4	89%	3	91%	4
Engaged Toward Employment	37%	3	43%	4	23%	3
Working Toward Self-Sufficiency	22%	3	33%	4	15%	2
Education	22%	3	18%	2	22%	3
Access to Somatic Care	90%	2	96%	3	92%	2
Community Inclusion	60%	2	73%	2	75%	2
Participant Empowerment	100%	4	87%	2	73%	1
Negative Disenrollment	1.20%	3	1.25%	3	2.03%	3
Hospital Bed Days	2.01	3	1.52	4	0.81	4
Emergency Room Visits	0.08	3	0.04	4	0.03	4
Involvement in the Criminal Justice System	7.3	1	6.33	1	5.05	1
Homelessness	3.97	1	6.02	1	2.31	1
Participant Satisfaction	99%	4	100%	4	99%	4
Quality of Life	95%	4	100%	4	93%	3
Family and Concerned Other Satisfaction	99%	4	92%	3	90%	3
Administrative Outcomes	91%	2	97%	4	94%	3
Agency Overall Performance	72%	3	75%	4	67%	2

**CSA ISA Participant Satisfaction Results by Item (N=15)**



**CSA ISA Quality of Life Results by Item (N=15)**



## CSA ISA Participant Comments (N=15)

### Services Delivered Effectively

*I guess first-off would be like whenever I have to schedule an appointment, they help out in guiding me to pick out a date that works for them and me. And they leave it up to me. I'm pretty independent already, but they guide me on things sometimes.*

*[We meet] once or twice a week. Well, I haven't had any problems with it so far. [I'm happy with the amount of time I get to see them.] I'm fine with it really.*

*Yes, they do. All I have to do is call them. Three times a month for store trips and when I need to pay my bills and if I need to go to the doctors so really three to five times a month. I'm fine with that. I just need to call them if I need them.*

*Yeah, they take me to the doctor all the time. They encourage me to go, and they take me to pick up my medicine. Even if I forget, they're on top of things for me, and I appreciate that.*

*Yep, they're usually pretty quick about it. ... Like I've called them like [the] day-before or day-of and they usually say, 'Oh, yeah, I can fit you in at this and this time either today or tomorrow'. It's pretty easy to do.*

### Positive Relationships with Agency or Staff

*Yes. I would say this is a great company. They try to help with anything they can, especially with mental health and making that better. They advocate for you to get the services and help you need to become stable in the community.*

*Well, I sometimes have issues at my apartment, and I know they'll advocate if I need help. Sometimes I have problems getting stuff fixed and I know they'll help.*

*Yes, I am. The consistency of their support. They're always there and they don't change. [The people can get replaced but they're still good people]. They make sure that you're comfortable and they talk to me. And they ask me what I want. They want my input and I like that.*

*[I] highly recommend. They can depend on them and they're good people and if they need ongoing support or somebody to depend on or support or [who is] reliable, they're just good people. If they need a program where they need help good old fashion help, just call them. They're not complicated and they give you respect, and you give them respect. Just be honest and they will help you do what you need to do to help yourself.*

### Positive Impacts of Services

*[Two things that have made my life better are] getting the confidence about making my appointments without help and being able to do everything else that's important.*

*My mental health, well since they helped me get the right programs, I'm not in an insane mood. I'm more aware. I'm more active. I'm more positive.*

*[The staff] makes me feel more independent [more under control]. I'm doing a good job cooking and doing better being involved in the community.*

*Oh, like I said early, I'm getting better at [entering and exiting] conversations without being awkward ...so just like being there and having a normal conversation.*

*My work has really improved a lot. I've gotten my career back on track, since I entered the program...just applying for jobs and everything...Just like I said, employment. Just having better employment than when I started the program, reaching my employment goals.*

### **Concerns**

*I think they're doing great, except moving on. One of my workers quit and is moving on to a different job. [It's a] bit hard changing people once you know someone.*

*[I] agree. The only thing I don't like is switching workers and having to start all over with a new one. That's frustrating because I know you can't really control that, but it can be hard to do that all over again and establishing that trust again.*

*[Staff is respondent to my needs] sometimes. They can take a while to get back to me, but I also don't know when they're busy.*

### **COVID-19**

*They were very helpful in reminding me of stuff because sometimes I just fall into habit. But they're very helpful in making sure I know what the policy at that time was. Like, they let me know when clients were allowed back in the front seat and they have been very helpful in letting me know when things change.*

*Oh yes, I felt they went above and beyond. They made sure I had masks, hand sanitizer, cleaning supplies. They took me to the store and made sure that I was safe. They took me to get vaccinated and they took care of everything. Even those free meals: they ordered them for me [and] offered to go to the store for me, offered to pick up my medicine for me. Yeah, they did a lot.*

*Yeah. I see them once or twice a month and that's not necessarily a need thing, that's a Covid thing that happened. Some things just haven't picked up. It would be nice if it could be a little more, but it is what it is.*

*Well, since the pandemic, it's been hard. And it's still a struggle since they're taking stuff away now that they're going back to normal. So it's not normal.*

### **Suggestions**

*I think I would like [it] if they did some more fun stuff to get my mind off everything. They help with all the important stuff, but just being able to do something fun too would be good.*

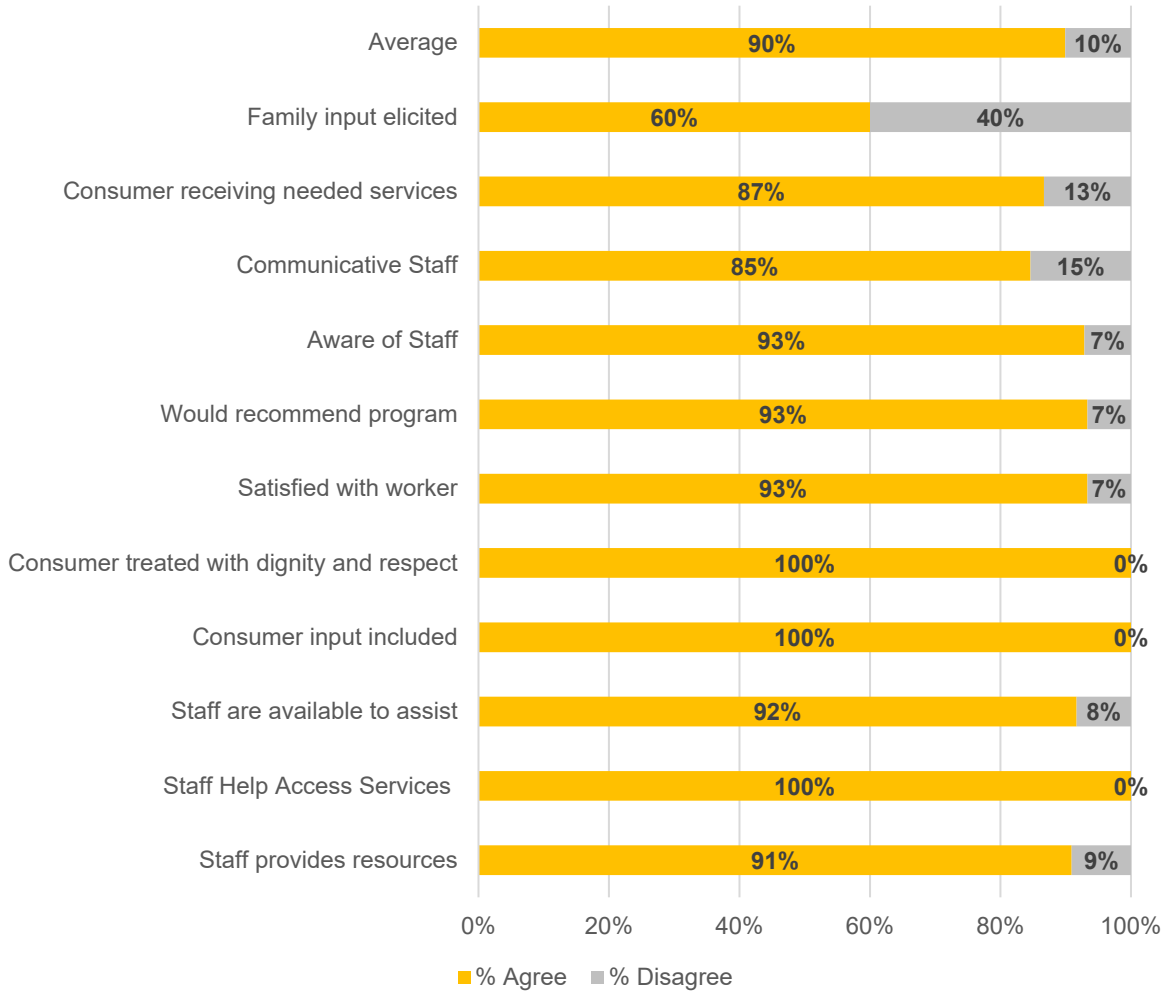
*I wish the building was open.*

*If the staff would call clients every once in a while, to check up and make sure they're okay, that would be an improvement.*

*I hope that ... we'll be able to continue to reach out to the senate and the politicians and the others who help with the funding to help with ongoing funds in that area and that we can reach out and get more funding for CSA.*



**CSA ISA Concerned Other Satisfaction Results by Item (N=15)**



**CSA ISA Concerned Other Comments (N=15)**

**Services Delivered Effectively**

*Well, their case worker has gone above and beyond in being there for them, whenever they need, and have tried to help [Participant] with different programs that are available to them. One thing [staff] did is they helped [participant] get on a payee situation, which worked out a lot better for them. [[Staff] helps take [participant] to places and also sometimes out to lunch.]*

*A hundred percent, yes. They work very well in getting to understand the individual and they work very well at getting to know the level that the individual is comfortable with ...and that the individual won't be bullied, and that they'll be listened to. They work very well with whatever the conditions or actions that are exhibited [and] whatever the problem is.*

*Via text, call, and sometimes he will meet us at [location], if we need to. As for how often: whenever we need, or if there is a crisis. Currently we have been meeting a lot.*

*When we can't find [Participant], [staff] will do what they can to help us out with what they can provide. Like when [Participant] sometimes takes us off the HIPAA stuff. [Staff] will help us make sure [Participant] gets checks and gives us peace of mind that [Participant] is keeping up on their housing and services.*

*When [participant] messes up, they talk to them about what needs to happen to remedy the situation at the time without being blaming and condescending in any way. They convince them that it's the right thing to do.*

### **Positive Relationships with Agency or Staff**

*They're all very pleasant, very respectful, and try to help. If something is wrong, we talk to them and get through it.*

*Yes, I've seen that, yes. Well, they're very patient with [participant] and I've been there a couple of times, when we have meetings or just talking on the phone, and [staff is] just very patient with them.*

*I feel like they show a lot of caring for their needs and desires and [that they] respect their boundaries.*

*I haven't worked with anyone else other than [staff] for a while now. I feel like they are really caring. I told them that I feel like [staff] is really going beyond their job duty and doing the best for [Participant]. [Participant] is doing great calling the staff and [staff are] making sure [Participant] is getting the best care even when [Participant] is hospitalized.*

### **Positive Impacts of Services**

*Probably just the transportation needs, but it's helpful for [Participant] because they're [giving them rides and stuff] and that gives us, the family members, time to be with them rather than take care of them.*

*The last couple years they've been... they moved to living with us, their parents. And they want a regular apartment with like a kitchen and everything. They goes out and do more exercise by themselves and they walk to the nearest store by themselves, and I feel like they've become sort of self-sufficient and can figure out their needs [and deal with them] on their own and with help.*

*Well, the move last fall was really important because, now they have people around them and they didn't before. They have nutritional food, because they don't have to cook, and if they're ill they have someone there they can see and ...there is someone there who can help them clean and just yeah.*

*They always say, "hi [Participant], how's it going?" And they enjoy that people engage in conversation because people think they're slow and will just stare and nod. So when they carry on a conversation with them, it makes them feel important.*

### **Concerns**

*They have a lot of people leave or change days they work. They change it up a lot.*

*I was satisfied with [staff member] until they gave me their notice. They were the only staff person I had but they [left] at the end of the month. Nobody has called to say "hey [RESPONDENT], we introduced [PARTICIPANT] to so-and-so."*

*They have and the resources are very limited. And again, guardianship not acknowledged or enforced.*

## **COVID-19**

*They didn't have any flare-ups, they just really stayed at home. The visits were by phone, so everyone stayed safe and protected [staff took PARTICIPANT to their physical in 2021]. I think they followed protocol.*

*They did use to have an adult day program [that was] closed for lack of participation. And then they helped them find a new adult day program. Pretty much everything shut down with the COVID, so it was a pretty bad situation.*

*Yes, when COVID happened I talked to them and since I speak English, I helped them talk over the phone.*

*There were just so many moving parts with COVID and [PARTICIPANT] wasn't taking their meds right, and just a bunch of things. I think it's nice now that they can just focus on [PARTICIPANT and their needs] and not all these other issues.*

*The best outcome from the pandemic was telehealth. Lowering the requirements for mental health providers to use telehealth services was extremely helpful. I know multiple people who are benefiting from virtual appointments to better their mental health.*

## **Suggestions**

*I think it would be really nice for the client and the guardian to have a list of services available to them, even if it's something that's a service in the community. It would still be nice to have those listed. Stuff like that would be really helpful.*

*Staff needs to stay, not get close to clients and then leave.*

*Maybe, a monthly update so the adults know how the child is doing. Now it's like, when they are having a bad day, I'm reactive instead of proactive. Having a monthly meeting so I know what their goals are and could be encouraging or help with reminders. It would be better than getting a call that they can't get in or they aren't answering the phone.*

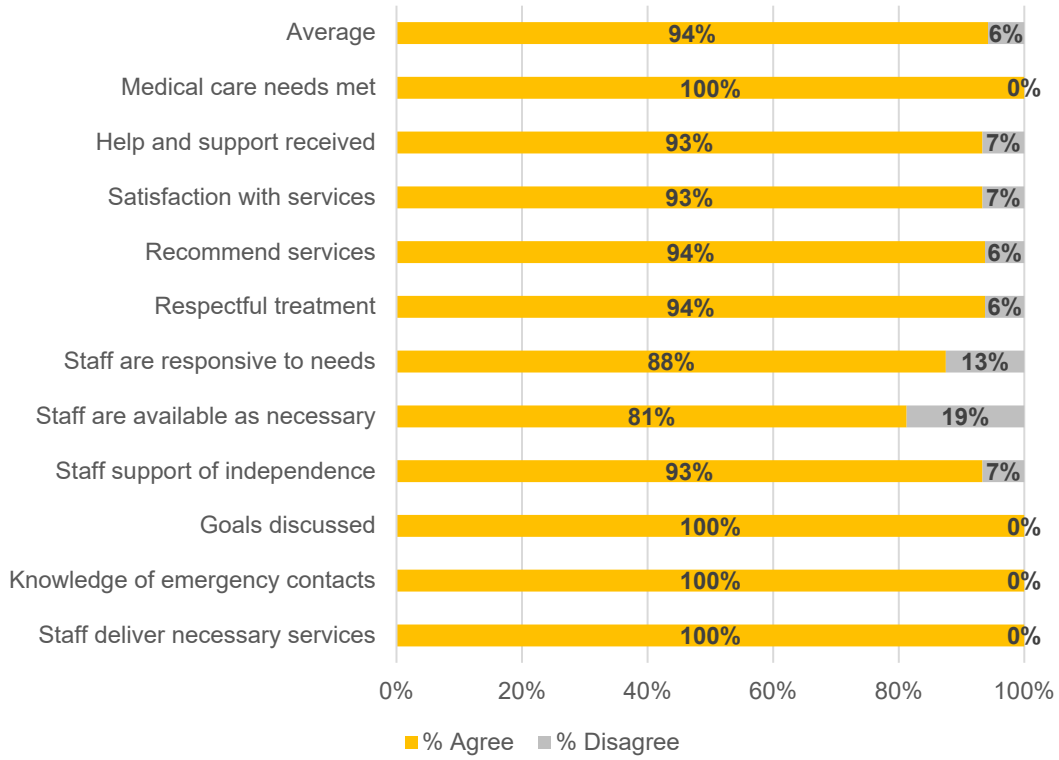
*I think that ...I know the pandemic has changed a lot of things. But they need a place where [PARTICIPANT] and people like them can go and learn skills. Somewhere they can learn how to be productive because right now it's like a hamster wheel where they're running around but not getting anything done. They need a place where everything is there: the work comes to them, they learn a skill. Not having this is why a lot of them become lost in the system.*

# Easterseals

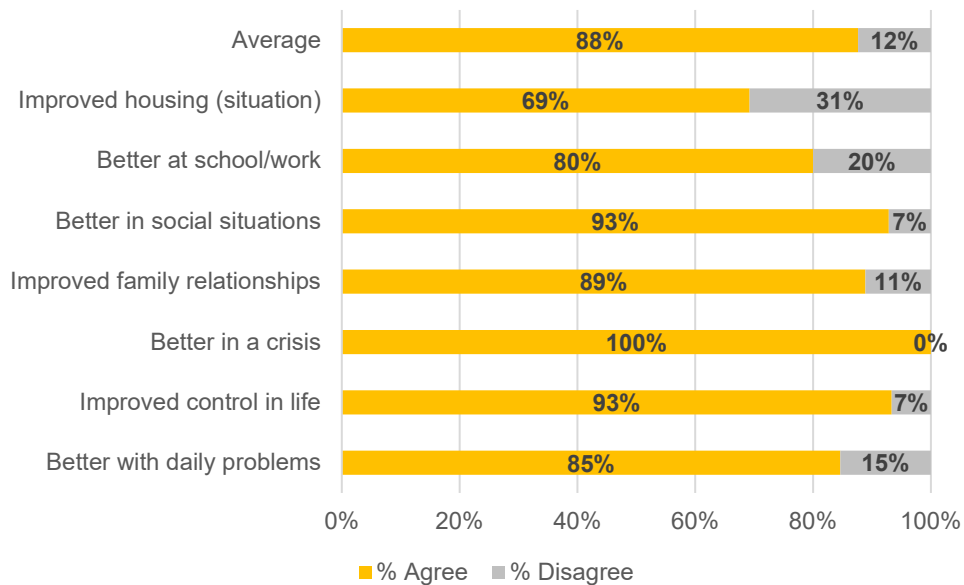
**Table 3. Easterseals Performance by Outcome 2020-2022**

	2020		2021		2022	
	Performance	Score	Performance	Score	Performance	Score
Housing	95%	4	98%	4	98%	4
Engaged Toward Employment	58%	4	52%	4	41%	4
Working Toward Self-Sufficiency	35%	4	39%	4	33%	4
Education	21%	3	22%	3	21%	3
Access to Somatic Care	86%	1	100%	4	100%	4
Community Inclusion	77%	2	97%	4	98%	4
Participant Empowerment	93%	3	87%	2	93%	3
Negative Disenrollment	0%	4	0%	4	0.00%	4
Hospital Bed Days	0.0	4	0.27	4	0.35	4
Emergency Room Visits	0	4	0	4	0.00	4
Involvement in the Criminal Justice System	0.27	4	1.04	3	0.94	4
Homelessness	0.29	4	0.15	4	0.00	4
Participant Satisfaction	98%	4	97%	4	94%	3
Quality of Life	98%	4	99%	4	88%	3
Family and Concerned Other Satisfaction	84%	1	84%	1	84%	1
Administrative Outcomes	99%	4	99%	4	99%	4
Agency Overall Performance	84%	3	89%	4	89%	4

**Easterseals Participant Satisfaction Results by Item (N=15)**



**Easterseals Quality of Life Results by Item (N=15)**



## Easterseals Participant Comments (N=15)

### Services Delivered Effectively

*I ended up in the hospital for two weeks and they came and visited me while I was there, for two weeks, and checked on me. Whenever I miss their awards program, they send it in the mail to me and on my birthday, they sent me a birthday card.*

*I see them once a month but, if I want to, I can have them see me more. Plus, I can call them anytime that I need something.*

*Every other week they take me shopping, if I need to go shopping, whatever comes up. Like if I wanted to move, they would probably help me find a place. They just do a lot of things to help me and other clients.*

*Yes, they are. That includes times that I have had seizures and stuff when they came and checked on me in the hospital. The schedule is once a week that we meet.*

*I see them every day at work. Every other week they take me shopping.*

*We always have, every so often. Once a year or so we talk about goals and what I want to do.*

### Positive Relationships with Agency or Staff

*I like that [staff] meets with me and we talk as friends and about my concerns. We're able to write them down, and I get a new perspective, I like that a lot.*

*Yes, I would. I'd tell them about the friendly and helpful staff and all they help and do for you. Talk about the activities calendar too because I really like that.*

*I'm an advocate for Easterseals of Central Iowa. I advocate for Easterseals and other clients.*

*I would say that they are easy to get along with and they are helpful. They will get you in contact with the people that you need to get in contact with.*

*Oh yes, absolutely. As I say, they care about you as an individual, not just another case. They really care about your wellbeing.*

### Positive Impacts of Services

*Due to my vocational training from them, I'm better at work.*

*I manage my job and my concerns. I don't bottle them and I'm able to communicate and get feedback on them.*

*Slowly but surely learning interview skills and how much detail to use and not use.*

*They come and help me with whatever I need. And since they help me with transportation to the doctors, that helps me to control my life.*

*They help me be more independent [and depend] on myself and everything.*

*Basically, parts that have made my life better: helping out at the garden, at the campground, and speaking with the President of the company too. ...Getting out into the community [to] socialize with people through them. Learning to stay calm is one of the greater parts of it too. Some previous and current staff members have helped.*

### Concerns

*Well, I usually get transport to work. I think they need to hire more people for that job, because one day I was waiting an hour and a half for my ride. I shouldn't have to wait an hour and a half for a ride to my place ten minutes away.*

*I have been homeless since January. [There was a previous ISA worker.] She said that I was just not doing anything and was telling Easter Seals that I was just using resources for nothing, so I stopped talking to them for about a month. I don't have an apartment, so I recently moved in with my mom and had been couch surfing before that.*

*Trying to help me out but I wish they would just get out and help me out more often. Like one of them did and the other one didn't. It depends on who I'm working with. It's hard to explain. But they have a high turnover rate too.*

*Not really sure; in the beginning they helped me with like ...they were like a therapist, and they helped me with my anxiety and depression and now I feel like they aren't doing that as much.*

## **COVID-19**

*Yeah, I like doing the activities. I wish they did it more, but since the pandemic, there's not as much stuff.*

*When they would come over to see me, we would wear masks and, they were still always there. When they were short staffed, they would let me know too, to keep me informed.*

*Whatever I needed, nothing stopped for me. The services were not disrupted.*

*With the changes in the rules and regulations, some staff for a while had the dividers that helped. I also help keep an eye on clients for them too. For the most part nothing went unaddressed. I had some lumps on my head and they took care of that. Yes, Easter Seals stays well in contact with folks.*

## **Suggestions**

*More funding to help more people. Improve the working conditions for staff so there isn't as much turnover. There has been a lot of that recently.*

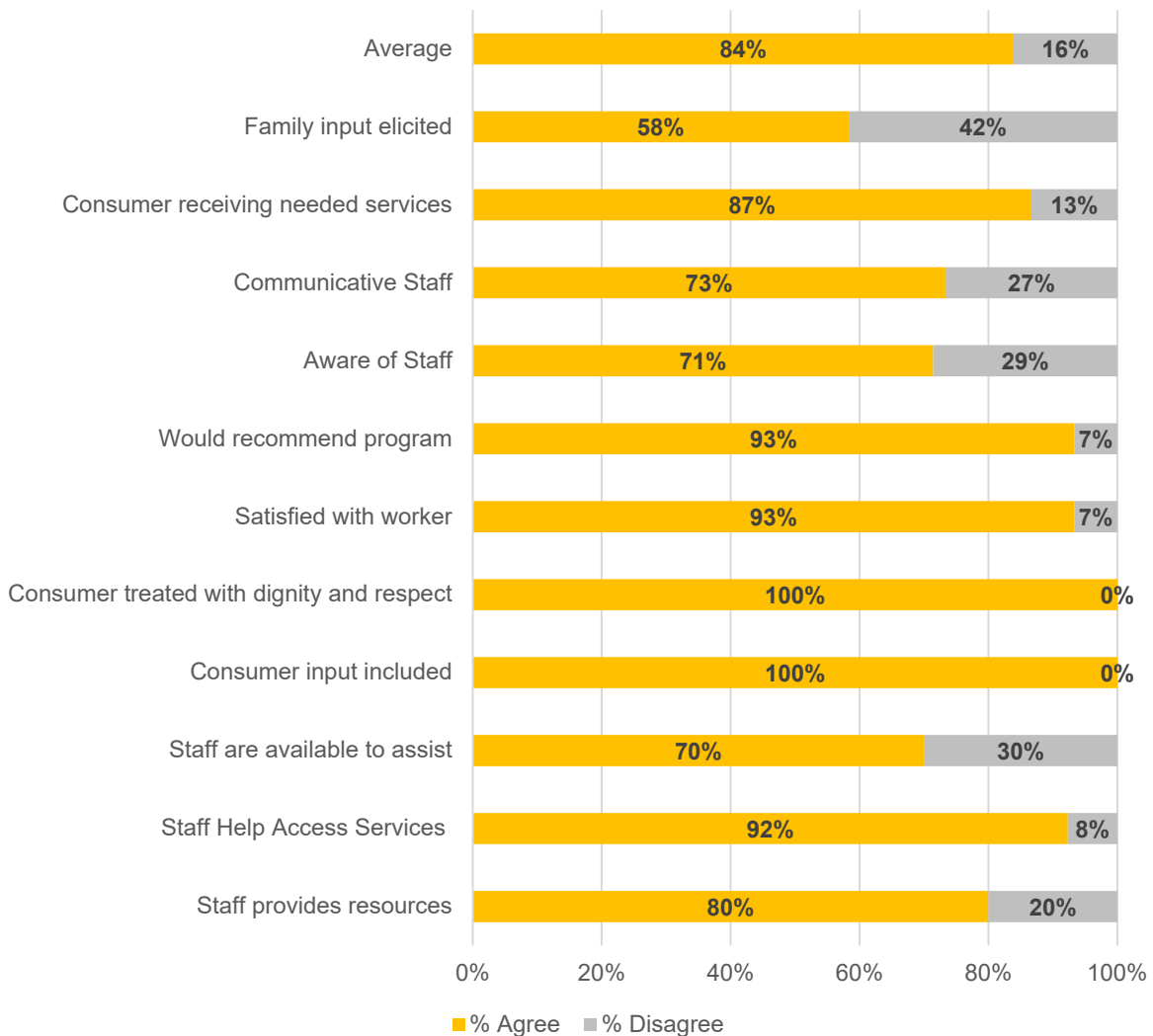
*Probably listen to what I need better and how else can I explain this, I don't know, tough question, I mean listen to my needs and help me when they're here with me instead of focusing on something else.*

*Getting more male staff, because I feel more comfortable around male staff, and they feel like more understanding [than the female staff].*

*Consulting more about the day and time that we meet.*

*I wish they would have a more experienced social security person on staff, and I do wish that they would do more outings.*

**Easterseals Concerned Other Satisfaction Results by Item (N=15)**



**Easterseals Concerned Other Comments (N=15)**

**Services Delivered Effectively**

*Maybe two to four times a year ...it depends on what's going on. They know I like to be involved, so if there is something that needs done, they make sure I know and am involved.*

*Yes. I'm comfortable with the contact because I know, if it's something important, they will reach out. And they are very responsive when I do.*

*When [Participant] ...calls, [staff] calls back and if [participant] texts, [staff] texts back. And [participant] just ...feels like they can communicate with [staff] and [staff] [will listen to what they have to say].*

*Yes, [staff is] very easy to read. If I have a question, I email them and, they always respond right away. And they always try to get back to me and help as much as they can.*



*They asked. [Staff] was here and did [participant's] evaluation and planning thing. [Staff] was very organized and efficient. We told them some activities in the city that [Participant] would like to do. We'll see if any of those shake out.*

### **Positive Relationships with Agency or Staff**

*They're very helpful, and they know all of the right people and places to get into and they're good advocates. We go down to the legislature too and try to talk to the legislators.*

*Again, I think they meet you where you're at. They have a lot of knowledge. They have good connections and they're respectful and kind.*

*Oh, yeah. They show [participant] a lot of respect. They understand their disabilities, and how to work with them. [Participant] really enjoys being around them and they talk about them a lot.*

*They ask [participant] what they want to do. They accept their input and let them ...they have an opinion, and they take that and make sure [participant] knows it's important.*

*They're responsive if we reach out, or have a question, and I know they are for him.*

### **Positive Impacts of Services**

*Again, I think back to the self-management type goals and just talking through what [participant] needs and safety issues and meals ...meal prep types of things. They actually helped [participant] get a dog. They have been wanting one for a while for companionship.*

*Well, with their help. [Staff] helped [participant] with interviews and helping them get this second part-time job and helped them with [interview ideas, practice, how to dress] and it got them that job at [location]. When [participant] got that second job, I think it boosted their ego, their self-worth. I think it helped encourage them to work on their weight and have pride in how they looked and how they dress.*

*Easterseals is supporting them with a job, coaching, and development. [Participant has] had a job for eight months. They help [participant] with going out. At first, they would take [participant] places...but now they can go on their own.*

*[Participant] socializes a little bit more.*

### **Concerns**

*Not for sure. When they used to take [participant] out, that was really helpful to them, but they don't do that anymore.*

*[There is some staff turnover. It has been hard to get to know the character of staff.]*

*No, they never once have called or talked to me. They can but they don't.*

*They suggest a lot of stuff, but I can't tell you one thing that they have done for them. They come a lot, but they don't do anything. I think it's a waste of time because it's always someone different and nothing is ever really done.*

### **COVID-19**

*Not really, just since COVID they don't do the group things and had people drop out. It seems like years ago they used to have meetings where we would meet with the leaders or staff and I don't think they do stuff like that anymore ...meetings with guardians.*

*It depends, like when a provider hasn't been there for a couple of weeks, they just say what's going on: if it's COVID or if he wasn't available. Just a phone to call say what's happening.*

*Well, there are more on-site visits since the start of the pandemic.*

*Well, they made sure we had our shots up to date and if we weren't they would just make appointments to take them there.*

## **Suggestions**

*They need to pay the people more money. They can't have staffing shortages, because it's hard work.*

*I'd like them to be able to take a trip like in past years. They don't do those as much anymore, probably because of funding. They don't have any guys. It's all women. And that's something it would be nice to have.*

*Well, I mean, they should get together more often and continue looking for a job and apartment if that's what they want.*

*I never know who they're currently working with or who still works there. It would be nice to know, as a family member, who's new and who's leaving so we can know who to get in contact with. The only other change I would say would be continuity: having to train a whole new person on how to deal and work with my sister... just so they know what to do and the signs. A discussion of the succession of information.*

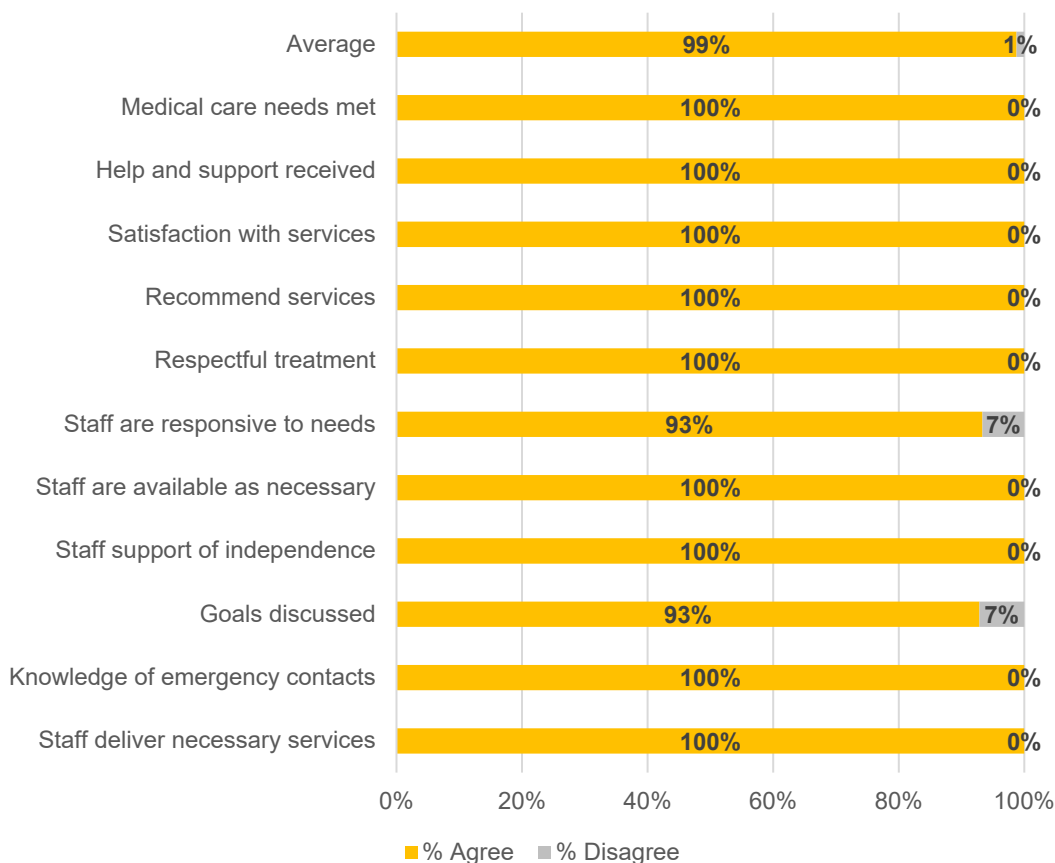
*I would like to see more social activity, but I can't honestly say they don't have them. Maybe [Participant] just doesn't take part in them.*

# Eyerly Ball

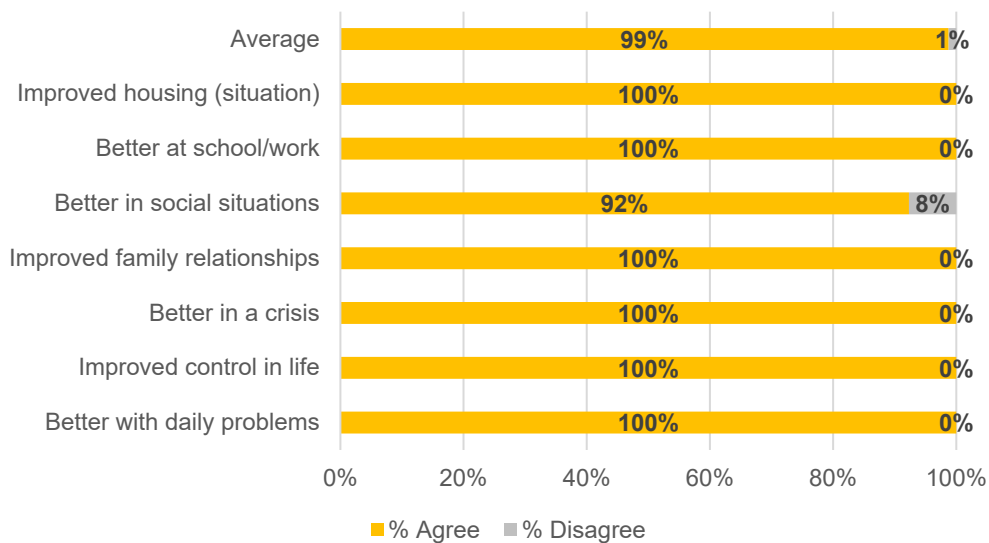
Table 4. Performance by Outcome 2020-2022

	2020		2021		2022	
	Performance	Score	Performance	Score	Performance	Score
Housing	97%	4	99%	4	99%	4
Engaged Toward Employment	52%	4	48%	4	21%	3
Working Toward Self-Sufficiency	39%	4	35%	4	15%	2
Education	22%	3	46%	4	51%	4
Access to Somatic Care	100%	4	100%	4	100%	4
Community Inclusion	77%	2	98%	4	99%	4
Participant Empowerment	93%	3	100%	4	100%	4
Negative Disenrollment	0.61%	4	2.45%	3	0.00%	4
Hospital Bed Days	1.49	4	0.59	4	0.82	4
Emergency Room Visits	0.01	4	0.03	4	0.02	4
Involvement in the Criminal Justice System	3.81	2	1.53	3	0.79	4
Homelessness	0.35	4	0	4	0.01	4
Participant Satisfaction	99%	4	99%	4	99%	4
Quality of Life	88%	3	99%	4	99%	4
Family and Concerned Other Satisfaction	86%	2	90%	3	92%	3
Administrative Outcomes	98%	4	100%	4	99%	4
Agency Overall Performance	86%	3	95%	4	94%	4

### Eyerly Ball ISA Participant Satisfaction Results by Item (N=15)



### Eyerly Ball ISA Quality of Life Results by Item (N=15)



## Eyerly Ball ISA Participant Comments (N=15)

### Services Delivered Effectively

*If they can do it, they'll move mountains to do it. I have no problems getting help in a timely manner. If I call in the morning, they will be there in the afternoon to help get it done.*

*They're pretty quick on it to help. And if they can't help, they find other resources that might be able to help.*

*Yes, they do. Once a year we go all over that stuff, and we discuss if we meet the goals and in those certain spots. And a year from now what do I want to be and how to get there and all that stuff.*

*They pay a portion of my rent, and they want me to be more active in the community, so they send me a monthly calendar and invite to go out to different activities so I'm not staying in all the time. They come out for monthly visits and wellness checks and constantly call me to make sure I'm alright.*

*They just say, 'Okay, where?' And 'What time?' And I'm also on their calendar for appointments. And I've got to call this week and make another appointment. They'll say, 'okay, we'll see you again'.*

### Positive Relationships with Agency or Staff

*Yes, that they're very good with people with disabilities and they are very good with privacy and their needs. They can help you with activities and being social and making you happy, you know.*

*[They provide] support, conversations, and just overall they're really great people. I feel comfortable being around them and being myself around them and opening up and confiding in them. That really makes a difference with me.*

*I'm happy that when something bad happens that is out of your control that they have that knowledge and understanding on how to help me, get me out of that rut.*

*There, these guys will treat me like an equal and they make me feel like a person. They treat me with respect, and we really get to know each other.*

*When I'm having a rough time, they don't say, 'oh, you shouldn't feel that way'. If I decide I don't want to do something, like with the activities, they don't get on my case. They give me space. They let me make my own decisions. They're really supportive and are great people to vent to.*

### Positive Impacts of Services

*It is easier to talk to other people. I don't really go out much, but I talk a lot at work. Having that interaction with Eyerly Ball makes it easier to talk pointedly at work and being able to have that session every week at Eyerly Ball has been helpful for work too.*

*I can tell you, I'm now able to come home and take care of my mom and dad like how it's supposed to be, you know. because of the program. And I'm sprouting and growing beautiful because of it.*

*I feel more secure because I know if there's something I can't deal with ...I know if something comes up, and I need to be somewhere, they will help me out. They've never turned me down.*

*Yes, I'm able to go to work without having any problems and I get there on time. If I have something I need to do for work, I'm able to do it better.*

*Yeah, I'm able to socialize more and just like get along with people more and be more social.*

### **Concerns**

*Well, right now [staff] can't [see me as much] because of training a new person and there's only two of them.*

*[I have] no goals at the moment.*

*I am and there have been a couple times I've been scared a couple times that they weren't going to get their grants and I was so scared that they were going to go away.*

*Not all the time, no. [Response time] depends. Usually I'll call them, and they say they'll look into it and call me back the same day but then I don't hear from them.*

### **COVID-19**

*Yes, they provided masks and make sure that they're six feet away from others when we were out in public.*

*Yeah, when I'm out socially. Like I said, I'm a little wary about going out because [I'm a high-risk individual with COVID concerns].*

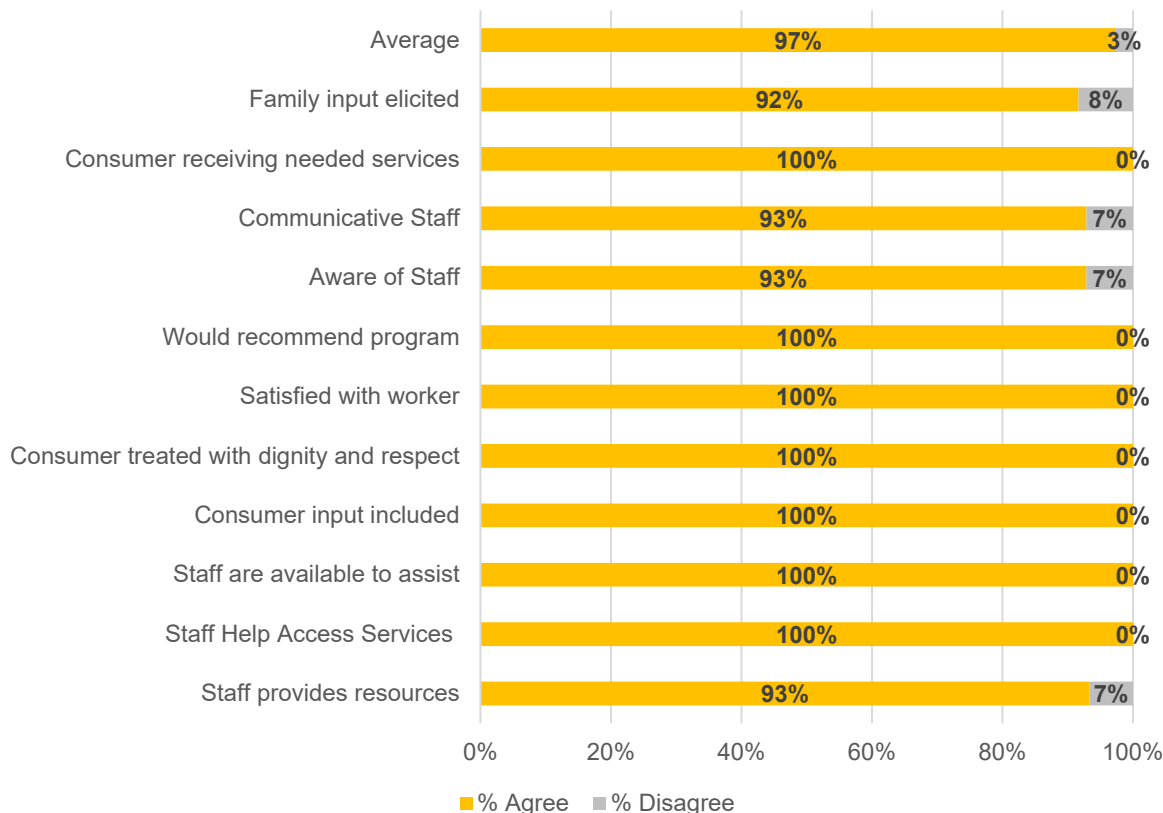
*Up until the pandemic, I did [better in social situations] but since then I limit my contact with humans because of immune problems. I still go to the store.*

### **Suggestions**

*It's a great program and I wish they had it all over the state. I used to live in [different city], and they didn't have it. I couldn't go back.*

*Nope, well more people, more staff.*

### Eyerly Ball ISA Concerned Other Satisfaction by Item (N=15)



### Eyerly Ball ISA Concerned Other Comments (N=15)

#### Effective Services

*Medication. Before, they would come down the stairs shaking the empty bottle and say, ‘Mom, we have a problem’. And it became my problem. So often they were without pills. It’s wonderful they can telehealth to their doctor. They automatically refill, call them, and deliver it to them. It’s huge. Huge. Just that pharmacy medication management is wonderful. And them having access to the doctor is huge, so much easier than me juggling it on my own and struggling. These guys take care of things. They’ll sit at the kitchen table and make calls with them if they need help.*

*Absolutely, because some of the things they talked about with goals and stuff and coming up with an employment plan and they just froze. They’ve worked really hard to become a small business owner and they make art. They have two shows they sell art at, and they sell online. We don’t need a management plan where you’re going to put them at [provider], which they hate. So, they listened to them when they said they didn’t need a job or schooling, but they wanted more places to sell their art.*

*They've had a lot of medical conditions and Eyerly Ball has been instrumental at setting up rides and getting them to these things and making appointments, things that they're not really good at.*

*They were available for them so that they could get their methadone so they wouldn't go out on the streets.*

### **Positive Impacts of Services**

*Oh gosh, yes. My stress level has gone so down since they've gotten the help. I can actually enjoy my child now.*

*They have actually. They went from the [provider] program to Eyerly Ball and that is the best thing that has ever happened to them. They moved to this new place that they and their roommate both love. I think they've been able to come out of this dark place and can do more and be happier.*

*Well, it has changed quite a bit. First-off they are clean from drugs and alcohol. They also had a major surgery. I think they realizes that they did almost die and part of it is that they were just so high they just stayed at home and didn't go to the doctor. So yes, they program has helped them.*

*They've been able to maintain their independent living because of Eyerly Ball.*

### **Positive Relationships with Agency or Staff**

*I agree. [participant] got [diagnosis]r and [staff] took them to all their [treatment] appointments. [participant] likes to go to the hobby shops and record shops. [Staff] was a godsend. They listened to what they doctors told [participant] and always got ahold of us to tell us what is going on.*

*The attention that they get from them, the fact that they are always willing to listen to them. They always take time for them, and they never treat them like a burden. The calendar thing is getting back to normal. Because of COVID there weren't a lot of activities, but that's getting back to normal. I really don't have any complaints. They've been a god send since the beginning.*

*They treat their clients as individuals, and that is very important for everybody. And I think that's important for [participant]. Because they've gone to many of their providers, and to them they're just a number, and with Eyerly Ball they treat them as an individual. They get to know their individual clients and can get to know them. And [staff] followed up and can tell when they're not their self and being available, so when someone is on vacation someone else is also available.*

*Absolutely, warm welcoming staff, very professional, and they treat people as individuals and every person there are there because they want to be. It's not just a job. They do it because they genuinely, truly, care.*

### **Pandemic and Quarantine**

*They were real good. They made sure we had plenty of masks and gloves and they were able to get access to the COVID shot. They've been real good about COVID.*

*Yes. They did have COVID and was isolated for the 14 days and they did come and leave boxes of food outside their door. And they communicated with them by phone more than normal, because of the isolation thing, because they have other issues.*

*They helped with their rent, and finding funds, at that time they were still dealing with a lot of anxiety. They held meetings virtually so they wouldn't miss out on meetings.*



*They've had to become more isolated due to the pandemic.*

### **Concerns**

*They have [diagnosis] and [diagnosis] so they're very anxious. If they don't show up on time, or don't show up, it makes them very upset. Their new staff showed up multiple times late.*

*I guess I haven't really had a lot of concerns. Only that they're a little bit short-handed so sometimes they can't always take him to go get groceries or take him to doctors' appointments. Sometimes it might be like they may not see them in-person, but they can always call.*

*Well, you know, they could do better at that. That is something they could do better in: telling me what they tell [participant]. They can also tell me and keep me in the loop with what is communicated to them.*

*My [sibling's] getting prepared to go into like dialysis and they take him to go to his mental health appointments. But they don't take him to his regular doctors' appointments, and I can't drive him to those anymore after having a stroke.*

### **Suggestions**

*Consistency: just one-person consistent ...and I know that's not realistic, but it would be super nice. Or a tree listing who each of their staff members are and who they should reach out to in each situation. Because they're [diagnosis]. If they had something visual to look at, it would be incredibly helpful to look and see who they may deal with.*

*They only thing would be the all day event mentioned previously. I wish they could provide an all-day activity one day a week.*

*Well, I think that if we could grind out some more mental health experts, I think that would help, so that they're not overworked and could be paid better. Because it's worth it. I don't know what they could specifically do for themselves, they just need more help.*

## Appendix B. Interview Scripts

### Participant Interview Script

<b>Full Survey item (<i>Participant Satisfaction</i>)</b>	<b>Abbreviated Survey item</b>
My (staff) helps me get the services I need	Staff deliver necessary services
I know who to call in an emergency	Knowledge of emergency contacts
My staff talks with me about the goals I want to work on	Goals discussed
My staff supports my efforts to become more independent	Staff support of independence
My staff are willing to see me as often as I need	Staff are available as necessary
When I need something, my staff are responsive to my needs	Staff are responsive to needs
The staff treat me with respect	Respectful treatment
If a friend were in need of similar help, I would recommend my program to him or her	Recommend services
I am satisfied with my [program] services	Satisfaction with services
I am getting the help and support that I need from [staff] and [agency]	Help and support received
Do you have medical care if you need it?	Medical care needs met
<b>Full Survey item (<i>Quality of Life</i>)</b>	<b>Abbreviated Survey item</b>
Since I entered the program, I deal more effectively with daily problems	Better with daily problems
Since I entered the program, I am better able to control my life	Improved control in life
Since I entered the program, I am better able to deal with a crisis	Better in a crisis
Since I entered the program, I am getting along better with my family	Improved family relationships
Since I entered the program, I do better in social situations	Better in social situations
Since I entered the program, I do better at school or work	Better at school/work
Since I entered the program, my housing situation has improved	Improved housing (situation)

### Family and Concerned Other Interview Script

Full Survey item ( <i>Concerned Others Satisfaction</i> )	Abbreviated Survey item
I am confident that our[ program] staff provides me with resources about programs and services that are beneficial to my family member and family	Staff provides resources
Staff helped us in obtaining access to the services he/she needed	Staff Help Access Services
Staff are available to assist me when issues or concerns with services arise	Staff are available to assist
Consumer's input into the service plan was well-received and his/her ideas were included in the plan	Consumer input included
The staff where my family member receives services treats him/her with dignity and respect	Consumer treated with dignity and respect
I am satisfied with my family member's worker	Satisfied with worker
If I knew someone in need of similar help, I would recommend the program that works with my family member	Would recommend program
My family member and I know his or her staff	Aware of Staff
My family member's staff contacts me, when appropriate, so I feel informed	Communicative Staff
My family member is getting the services she or he needs	Consumer receiving needed services
Did consumer's staffing team ask you what services and support he/she needed to stay healthy and safe at home [and work]?	Family input elicited

## Appendix C. Data Sources

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Procedures: The following outlines procedures for the FY19 evaluation. Information was obtained from four sources:

1. Meetings with program directors and staff members
2. File reviews
3. Interviews with participants and family members
4. Analysis of data submitted to Polk Management Information System (Polk MIS)

### Meetings

Phone consultations were conducted with each of the program directors in to review the file review results. Finally, exit interviews were held with PCHS and program staff in early August to review the complete report.

### File Reviews

LHPDC randomly selected 15 program participant files from each agency for file review, for a total of 60 files reviewed. The File Review Form (Appendix D) was used to monitor documentation. The expectation is that reported results will be consistent with information in the file for PCMHDS to have confidence in and rely on the information reported by the programs. **Participant Empowerment** outcome is based solely on the file review. As technical assistance, programs were provided with information from the file review. Information from the file review analysis is reported in Appendix A.

### Interviews – Participant and Concerned Others

Participants and Concerned Others were interviewed as part of the evaluation process. A target of fifteen participants and fifteen concerned others were interviewed from each ISA program. Interviews were conducted by phone. The interview questions are included as Appendix B of the report. Agree/disagree responses to the questions make up the statistics used for the **Participant Satisfaction, Family and Concerned Other Satisfaction** and **Quality of Life** outcome scores. Comments from the interviews are included in Appendix A. Although direct quotations are used, neither names of respondents nor staff members are included and gendered pronouns (e.g. he, she his, hers) of both respondents and staff members were replaced with they/ them to de-identify comments.

### Outcome Data

The evaluators were provided with all the data that each of the programs submitted monthly to PCMHDS.

## Appendix D. File Review Form

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### Administrative

#### Q1.1. File Review Start Date

#### Q1.2. File review status

- First round (July-February)
- Second round (March-June)
- Final disposition (post discrepancy meeting)

#### Q1.3. Integrated Service type

- ISA
- FACT
- KEY

#### Q1.4. Reviewer

- Reviewer 1
- Reviewer 2
- Reviewer 3
- Reviewer 4
- Other

#### Q1.5. Member Identification

PolkMIS ID	<input style="width: 100%;" type="text"/>
Participant First Name	<input style="width: 100%;" type="text"/>
Participant Last Name	<input style="width: 100%;" type="text"/>
Alias	

8/10/22, 6:48 PM

Qualtrics Survey Software

Date of Birth

Age

Date of Enrollment

Agency

Staff First Name

Staff Last Name



**Q1.6. Are the Member ID fields above consistent with PolkMIS sample list?**

- Yes
- No

**Polk MIS events**

**Q2.1.**

**Enter the Date(s) listed in PolkMIS**

**Enter NA if event isn't documented in PolkMIS during the reporting period (July 1 2020 - June 30 2021)**

**If an event type has more than one status, enter the most recent and active status**

	Polk MIS Event List Date(s)
LOCUS / LOF	<input type="text"/>
Housing Status (write in event type(s)) <input type="text"/>	<input type="text"/>
Employment status (write in event type(s)) <input type="text"/>	<input type="text"/>
Education	<input type="text"/>
Somatic Care	<input type="text"/>
Community Inclusion	<input type="text"/>

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Qualtrics Survey Software

	Polk MIS Event List Date(s)
Homelessness	<input type="text"/>
Jail	<input type="text"/>
Negative Disenrollment	<input type="text"/>
Psychiatric Emergency Department	<input type="text"/>
Psychiatric Hospitalization	<input type="text"/>



**Q2.2. PolkMIS events notes**

**Level of Functioning**

**Q3.1. Level of Functioning (LOCUS/ICAP/SIS)**

	Date(s)		PolkMIS and document consistent?		Assessment		
	PolkMIS	LOF document	Yes	No	LOCUS	ICAP or SIS	Document missing
Most Recent Level of Functioning	<input type="text"/>	<input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Q3.2. LOF is 5 or 6?**

- Yes
- No (1-4)

**Q3.3. Level of Functioning notes**

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Qualtrics Survey Software

## Housing

### Q4.1. Housing Checklist and PolkMIS Events

Additional housing events can include

- Change of address
- Change in CL criteria
- Housing checklist completion

PolkMIS Event type		Date		Checklist Meets Criteria	
		PolkMIS	Checklist	Yes	No
<input type="checkbox"/> Annual Documentation		<input type="text"/>	<input type="text"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/> Additional housing event 1		<input type="text"/>	<input type="text"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/> Additional housing event 2		<input type="text"/>	<input type="text"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/> Additional housing event 3		<input type="text"/>	<input type="text"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/> Additional housing event 4		<input type="text"/>	<input type="text"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/> Additional housing event 5		<input type="text"/>	<input type="text"/>	<input type="radio"/>	<input type="radio"/>

### Q4.2. Home visits



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Qualtrics Survey Software

**Enrollment Date:**

**Home visit criteria: no more than 90 days lapse between home visits**

	Addressed 4 times throughout year? Enter at least one date for each quarter				Not applicable	Hor
	~July-Sept	~Oct-Dec	~Jan-Mar	~Apr-June	Request not to visit at home	Total found
Home Visits phone and video call meet criteria	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>



**Q4.3. All housing events agree and documented? If no, explain in notes**

- Yes
- No

**Q4.4. Housing notes (documentation source, address, relocation dates, checklist details, etc.)**

**Employment and Wage Reporting**

**Q5.1. Employment**

Select all applicable employment statuses during the reporting period and write in dates of active status

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Qualtrics Survey Software

**From PolkMIS:**

Employed

- 
- Employed (includes Competitive, Does not meet criteria, CWE for MEPD, Enclave, Self Employed, Supported Employment, Workshop)
- >=20'/wk & >=min wage
- 5'-19'/wk & >=min wage

Inactive employment

- Unemployed (includes Engaged, not engaged, education skills/training)
- Not in Labor Force (includes LOS 5/6, retired)

**Q5.2. Does the participant's PolkMIS status indicate any type of Employment in the fall (10/18/20 - 10/31/20) or spring (4/16/21 - 4/30/21) reporting periods?**

- Yes, fall reporting period
- Yes, spring reporting period
- No, neither reporting period

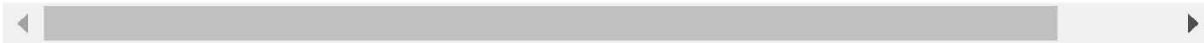
**Q5.3. Hours worked and wages**

	Hour and wage reporting			Source of wage reporting
	Hours worked (over 2 week time period)	Wage (per hour)	Date verified	
Fall Reporting Period (10/18/20 - 10/31/20)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="v"/>

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	Hour and wage reporting			Source of wage reporting
	Hours worked (over 2 week time period)	Wage (per hour)	Date verified	
Spring Reporting Period (4/16/21 - 4/30/21)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="v"/>



**Q5.4. Employment and Wage and Hour reporting comments**

**Examples:**

**Dates active in each employment status**

**Change in job**

**Documentation inconsistencies**

**Education**

**Q6.1.**

**Education**

Dates	Educational activity details
-------	------------------------------

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	Dates		Educational activity details
	From PolkMIS	From file	Activities
	From PolkMIS	From file	Activities
Education	<input type="text"/>	<input type="text"/>	<input type="text"/>



**Q6.2. Education notes**

**Participant Empowerment**

**Q7.1. Empowerment plan goals**

	Goals and services	
	From empowerment plan(s), enter participant goals	From reviewer notes, enter services provided that are aligned with goals
Empowerment plan 1 goals	<input type="text"/>	<input type="text"/>
Empowerment plan 2 goals <i>(if provided and unique from empowerment plan 1 goals)</i>	<input type="text"/>	<input type="text"/>
Empowerment plan 3 goals <i>(if provided and unique from empowerment plan 1 and 2 goals)</i>	<input type="text"/>	<input type="text"/>

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### Q7.2. Empowerment Discussion Quarterly Expectations

**Enrollment Date:**

	Addressed 4 times throughout year? Enter at least one date for each quarter				Empowerment discussions	
	~July-Sept	~Oct-Dec	~Jan-Mar	~Apr-Jun	Found	Expected
Employment or Education discussed	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Community Inclusion discussed	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

### Q7.3. Empowerment planning

	Yes	No
Individualized and measurable goals are in place (see Q7.1)		
<ul style="list-style-type: none"> <li>Empowerment plans provided for entire reporting period (July-June)</li> <li>Empowerment plan meeting held during reporting period, date(s)</li> </ul> <input type="text"/>	<input type="radio"/>	<input type="radio"/>
Documentation supporting consumer involvement in goal development		
<ul style="list-style-type: none"> <li>Client signature included on each plan (or appropriate notation), provide date(s)</li> </ul> <input type="text"/>	<input type="radio"/>	<input type="radio"/>
Empowerment discussions (employment, education, community inclusion) regularly held (Q7.2)	<input type="radio"/>	<input type="radio"/>
Documentation in the file reflecting services delivered (see Q7.1)		
<ul style="list-style-type: none"> <li>Monthly contact maintained throughout evaluation period (Q11.1)</li> </ul>	<input type="radio"/>	<input type="radio"/>

### Q7.4. Participant Empowerment score (Q7.3 total)

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Score achieved

Score expected

### Q7.5. Participant Empowerment comments

## Somatic Care

### Q8.1. Somatic care

	Dates		Somatic care
	From PolkMIS	From file	Details, describe discrepancy if applicable
Somatic Care	<input type="text"/>	<input type="text"/>	<div style="border: 1px solid #ccc; height: 40px;"></div>

### Q8.2. Somatic Care notes

## Community Inclusion

### Q9.1. Community Inclusion

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	Dates		CI details from file
	From PolkMIS	From file	Activities
Community Inclusion	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Q9.2. Community inclusion notes**

*Include any activities that were reported as community inclusion, but do not meet criteria*

**Adverse Experiences**

**Q10.1. Adverse experiences**

	Event reported in Polk MIS?	Event documented in file?		Do PolkMIS events agree with file?	
	Date, if applicable	Yes	No	Yes	No
Homelessness	<input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Jail	<input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Negative Disenrollment	<input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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	Event reported in Polk MIS?	Event documented in file?		Do PolkMIS events agree with file?	
	Date, if applicable	Yes	No	Yes	No
Psychiatric Emergency Room Visits (not admitted)	<input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Psychiatric Hospitalizations	<input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Q10.2. Adverse Experiences notes**

**Routine Expectations**

**Q11.1. Routine contact**

**Enrollment date:**

	Were services provided and documented?		
	Yes	No	NA
Monthly contact initiated by agency and documented?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Dates of program enrollment consistent between PolkMIS and Agency?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Notes are original (not copied and pasted)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Q11.2. Routine contact notes**



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**Reviewer Notes**

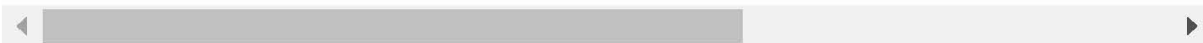
**Q11.3. Did any of the following events happen during the reporting period?**

	Yes	No
Participant moved to a new home (Housing)	<input type="radio"/>	<input type="radio"/>
Participant started a new job (Employment)	<input type="radio"/>	<input type="radio"/>
Participant was hospitalized (Adverse Experiences)	<input type="radio"/>	<input type="radio"/>

**Q12.1. Post-move home visits (should occur twice a month for 2 months)**

***New housing checklist should be completed for new home, if not provided, list as discrepancy***

	Date	Housing checklist completed		Month 1	
	Move date	Yes	No (discrepancy)	Visit 1 Date	Visit 2 Date
Change of Address - new address <input type="text"/>	<input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	<input type="text"/>
Change of Address 2 - new address <input type="text"/>	<input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	<input type="text"/>
Change of Address 3 - new address <input type="text"/>	<input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	<input type="text"/>
Change of Address 4 - new address <input type="text"/>	<input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	<input type="text"/>

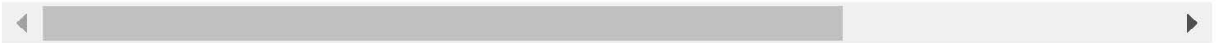


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**Q13.1. New job site visits (should occur twice a month for 2 months)**

	Date	Month 1		Month 2	
	New job date	Visit 1 Date	Visit 2 Date	Visit 3 Date	Vi
New job employer <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
New job employer 2 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
New job employer 3 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
New job employer 4 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



**Q14.1. Post-hospitalization F2F visits (should occur weekly for one month)**

	Date	Month 1			
	Hospitalization date	Week 1 Visit Date	Week 2 Visit Date	Week 3 Visit Date	W
Hospitalization notes <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Hospitalization notes 2 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Hospitalization notes 3 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Hospitalization notes 4 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



**Q15.1. Finalize reviewer notes**

Include details such as

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- **Date of contact**
- **Method of contact (include location if face-to-face)**
- **Notable events related to participant circumstances (e.g. transportation, health, housing, major relationships)**
  - **Safety Concerns**
  - **Substance Use**
  - **Housing issues, change in meeting checklist criteria**
  - **Change in Employment**
  - **Education**
  - **Goal planning, annual meeting**
  - **Relocation, moved, change households**
  - **Somatic care**
  - **ED visits**
  - **Hospitalization**
  - **Homelessness**
  - **Jail**
  - **Negative disenrollment**
  - **Transportation issues**
  - **Changes to health**
- **Include details such as dates, sources, context about notable events if applicable**

**Examples of "other" notable events can be anything that affects a participant's treatment or progress, such as:**

- **Relationship issues**
- **Trauma**
- **Medication mismanagement**
- **Unable to be located**
- **Change in program status ( on hold status, disruptions in Medicaid eligibility)**
- **Notes about participant, but not direct contact (such as provider-to-provider communication, or MCO communication)**
- 

**Note discrepancies such as**

- **Gaps in contact for longer than 30 days**

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- Repetitive notes (copied and pasted repeatedly)
- Notes do not match participant file
- Inconsistencies between PolkMIS documents and agency documents
- Mismatch between services and activities and participant goals (when goals are provided)
- Logical inconsistencies
- Date inconsistencies
- Missing documentation

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**Q15.2. Review notes from previous sections**

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**Q15.3. Final status summary**

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- No discrepancies to report
- Potential discrepancies to discuss or clarify
- Discrepancies present - scores affected

**Q15.4. Please provide all information from your file review needed to understand the context and nature of discrepancies found**

*Include dates of case notes and how the file is discrepant. For example, how notes and PolkMIS event don't match, lack of documentation supporting requirements, or how notes indicate requirements have not been met.*

**Start each new discrepancy with \*\* to keep separate**

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