

Partnership Assessment Form - Key Event Tracking - Quarterly Assessment (3M)

Partnership Assessment Form (PAF)

Completed at admission, covers partner's information prior to enrollment

- Residential
- Education
- Employment
- Sources of Financial Support
- Legal Issues / Designations
- Emergency Intervention
- Health Information
- Substance Abuse

Key Event Tracking (KET) Form

Completed when changes occur in partner's quality of life areas

- Residential
- Education
- Employment
- Emergency Intervention
- Benefits Establishment
- Legal Issues / Designations
- Health Status
- Administrative Information
- Administrative Discharge Reasons

Quarterly Assessment Form (3M)

Completed on a quarterly basis after partner's enrollment

- Education
- Sources of Financial Support
- Legal Issues/Designations
- Health Status: Does the Partner Have a Primary Care Physician
- Substance Abuse: Diagnoses and Treatment
- Activities of Daily Living (ADL) / Instrumental Activities of Daily Living (IADL)

Partnership Assessment Form - Key Event Tracking - Quarterly Assessment (3M)

Partnership Assessment Form (PAF)

- The initial baseline history on the PAF is collected only once when the Partner is enrolled into an FSP program.
 - The exception is when there has been a break in service of one year or more.
 - Only after a break of one year should a second PAF form should be completed.
- The PAF must be collected before any other outcome assessment forms (KET, 3M).
- PAF data collection should be completed within 60 days of the partnership enrollment date, which is the date of enrollment into a FSP.
- Programs determine the exact date the client is determined to be a FSP Partner.
- Partially completed PAF's cannot be successfully submitted to the State.

Residential

- Tonight: Where the Partner will be residing on the evening of the day the partnership is established.
- Yesterday: Where the Partner was residing the day before the Partnership date (as of 11:59 p.m.). The day before the Partnership Date.
- Last 12 months: Number of occurrences and the number of days the Partner resided in each setting. The total number of days must equal 365.
 - "Last 12 months" is defined as the 12 months prior to the Partnership Date.
- Prior to last 12 months: Residential settings the Partner resided in over his/her lifetime.

Education

- The highest level of education completed.
- For Adults indicate any education involvement.
- The Child/Youth and TAY PAFs have two data sections for educational status depending on whether the Partner is required to attend school.
 - Youth required to attend school: Estimate attendance level currently and during the past 12 months.
 - Youth not required to attend school: Estimate of the number of weeks for each educational setting.

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Employment

1. During the last 12 months
 - The number of weeks for each employment setting.
 - The total number of weeks in any one category cannot exceed 52 weeks.
 - The total number of weeks across all categories can exceed 52 weeks.
 - Average hours per week and the average wage per week for each category.
 - If a Partner had two different jobs within the same category with different wages, average hourly wages are calculated.
2. Current Employment
 - This section to indicates if the Partner is not currently employed

Sources of Financial Support

Mark all sources of financial support that apply.

- Caregiver's Wages
- Partner's Wages
- Partner's Spouse / Significant Other's wages
- Savings
- Child Support
- Other family member / friends
- Retirement / Social Security Income
- Veterans Assistance Benefits
- Loans / Credit
- Housing Subsidy
- General Relief / General Assistance
- Food Stamps
- Temporary Assistance for Needy Families (TANF)
- Supplemental Security Income / State Supplementary Payment (SSI / SSP) Program
- Social Security Disability Insurance (SSDI)
- State Disability Insurance (SDI)
- American Indian Tribal Benefits
- Other
- No financial support of any kind for the entire past 12 months

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Legal Issues/Designations

1. Currently

2. During the past 12 months

3. Prior to the last 12 months

- Dependent status (WIC 300, Foster Care, Adoption, and Reunification) of the Partner and the Partner's child.
- Justice system involvement
- Conservatorship / Payee Information
 - Conservatorship: Determined by court order and a conservator is appointed to oversee the care of the individual.
 - Payee: Authorized representative who oversees the revenue resources on behalf of the Partner.
- Dependent information (Child/Youth and TAY forms) indicates whether the Partner is currently a dependent of the court.
- Total number of children the Partner has in each of the categories. The response options refer to the current custody information, as of the partnership enrollment date.

Emergency Intervention (emergency room visit, crisis stabilization)

Two categories for record emergency intervention information

- Physical Health: Total number of times a Partner received an emergency intervention during the past 12 months.
- Mental Health/Substance Abuse: Times a Partner received a mental health and/or substance abuse related emergency intervention over the past 12 months.

Health Information

- Information about whether the Partner has a primary care physician. A primary care physician for the purposes of this assessment is the licensed medical professional the partner would contact with regard to his or her health care.

Substance Abuse

- Staffs determination that the Partner has an active co-occurring mental health and substance abuse problem.
- Substance abuse services are recorded and include participation in Narcotics Anonymous and Alcoholics Anonymous.

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Key Event Tracking (KET) Form

The KET provides a snapshot of changes in key quality of life areas that are tracked on a continuous basis throughout the course of the Full Service Partnership.

- There is no limit to the number of KET forms that can be submitted.
- KET forms should be submitted after submitting the PAF
- KET forms should be completed as soon as events are known or reported to the Partnership Service Coordinator. When completing a KET, complete only the sections where a change has occurred for the Partner.
- Key events that occur in different domains concurrently can be reported on one form.
- When two key events occur in one domain, a KET must be submitted for each instance.

Changes in any of the following areas should cause you to report a KET on a Partner.

Residential

- Partner is hospitalized
- Partner is discharged from the hospital
- Partner is jailed
- Partner is released from Jail/Juvenile Hall
- Partner loses housing
- Partner moves to a new housing arrangement even if level of housing doesn't change

Benefits Establishment

- Partner obtains new Benefits

Education

- Partner completes a grade or degree
- Partner is suspended or expelled
- Partner enrolls in or stops attending other types of educational settings
- Education becomes a part of the Partner's recovery goals

Employment

- Partner gains or loses a job/ position
- Partner changes hours, hourly wages, or type of employment settings
- Employment becomes one of the Partner's recovery goals

Emergency Intervention

- Partner receives services in an emergency room for physical or psychiatric care.
- Partner receives emergency psychiatric services from a crisis response team
- Partner is admitted to a 23-hour crisis stabilization program.

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Legal Issues / Designations

- Partner has contact with the police (meaning they are under suspicion, questioned, etc.)
- Partner is arrested
- Partner is incarcerated
- Partner is placed or removed from probation or parole
- Partner becomes or is no longer a dependent or ward of the court
- Partner is placed on or removed from conservatorship or payee status

Health Status

- Partner suffers from a major physical injury or illness
- Partner obtains and utilizes significant medical services

Administrative Information

- Transfer: Partner moves to a new FSP Provider.
- Disenrollment: Partner leaves the FSP.
- Reinstatement: Partner is restarting the FSP after he/she was disenrolled.
- The Personal Service Coordinator (Case Manager) assigned to the Partner has changed

Administrative Discharge Reasons

1. Target population criteria are not met
2. Partner decided to discontinue Full Service Partnership participation
3. Partner moved to another county / service area
4. After repeated attempts to contact partner, s/he cannot be located
5. Community services / program interrupted – Partner's circumstances reflect a need for residential / institutional mental health services at this time [such as Institution for Mental Disease (IMD), Mental Health Rehabilitation Center (MHRC), State Hospital]
6. Community services / program interrupted – Partner will be serving JAIL sentence
7. Partner has successfully met his / her goals such that discontinuation of Full Service Partnership is appropriate
8. Partner is deceased
9. Community services / program interrupted – Partner will be placed in JUVENILE HALL / CAMP / RANCH
10. Community services / program interrupted – Partner will be placed in DIVISION of JUVENILE JUSTICE
11. Community services / program interrupted – Partner will be serving PRISON

Partnership Assessment Form - Key Event Tracking - Quarterly Assessment (3M)

Quarterly Assessment Form (3M)

The Quarterly Assessment Form is completed every three months after the partnership is established. Updated information is collected about changes in:

- Education
- Sources of Financial Support
- Legal Issues/Designations
- Health Status: Does the Partner Have a Primary Care Physician
- Substance Abuse: Diagnoses and Treatment
- Activities of Daily Living (ADL) / Instrumental Activities of Daily Living (IADL)
 - Older Adults Only

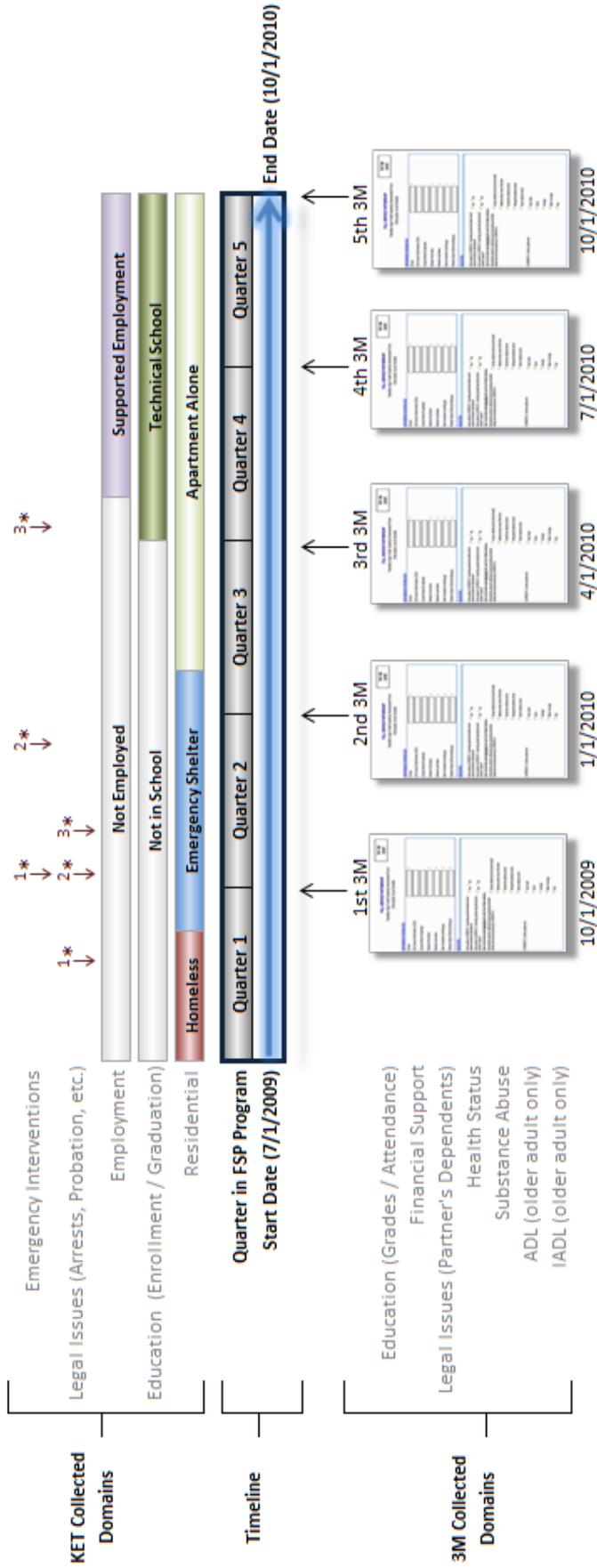
3M Submission Schedule

- The first quarterly assessment is due three months (90 days) after the date the partnership was established. The next assessment is due 6 months after the partnership was established, then again at 9 months, at 12 months, at 15 months, etc.
- The Quarterly Assessment Forms can be completed 15 days prior to the due date and up to 30 days after the due date.

Domain	PAF	KET	3M
Residential	✓	✓	
Education			
School Enrollment and Graduation/Completion Dates	✓	✓	
Grades, Attendance and Special Education Assistance	✓		✓
Employment	✓	✓	
Sources of Financial Support	✓		✓
Legal Issues / Designations			
Partner's Issues Legal	✓	✓	
Legal Designation of Partner's Dependents*	✓		✓
Emergency Interventions	✓	✓	
Health Status	✓		✓
Substance Abuse	✓		✓
ADL and IADL: Older Adult Only*	✓		✓

* PAF History Is Not Collected

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A partnership is established on 7/1/2009 with a TAY. The baseline information for the partner indicates that the partner is homeless, not in school and not employed. The partner currently has a co-occurring substance abuse problem for which he is not receiving treatment services, and the partner is currently receiving no financial support. On 8/25/2009, the partner has his first arrest during the program, and the arrest date is recorded in the FSP DCR via a KET. On 9/5/2009, the partner moves into an emergency shelter and the residential change and date are recorded in the FSP DCR via a KET.

Outcome data is collected on 3Ms and KETs throughout the partnership as FSP services are rendered as illustrated.

Then on 10/1/2010, the end of the partner's fifth quarter in the FSP program, the partner receives his fifth 3M assessment. The partner's current status indicates that he no longer has a co-occurring substance abuse problem, and he is no longer receiving treatment services. The partner is still receiving food stamp and housing support. The partner has met all of his goals, and is discontinued from the FSP Program via a KET with a discontinuation reason and date.