

P-2341 Assessment (Reach Up Services rule 2302.3)

Overview of PHQ2/UNCOPE (19-18)

The PHQ2 and UNCOPE are assessment tools used by the Reach Up program.

PHQ2 (Patient Health Questionnaire) screens for common mental health issues.

The UNCOPE (Used, Neglected, Cut Down, Objected, Preoccupied, Emotional) identifies possible risk of abuse and dependence for alcohol and other drugs.

Completing the PHQ2/UNCOPE

The PHQ2/UNCOPE should be completed within 30 to 60 days of your first meeting with a participant. Sometimes it is best to wait a few meetings to build a relationship before asking a participant to complete the PHQ2/UNCOPE.

The PHQ2/UNCOPE can be given to a participant to complete themselves, or it can be verbally reviewed by the case manager with the participant.

If the participant has already disclosed to you that they have a substance use disorder, depression, or they are in treatment, do not rescreen. Make a note on the screening form and in case notes.

If a participant has a break in benefits, only do a rescreen if you have reason to believe things have changed, or if you think you might get different screening results and the participant is amenable to completing it again.

Do not rescreen ongoing participants unless there is a change in circumstances. If there is a change you can reassess at any time if the participant is willing. Examples of reasons to rescreen would include, but are not limited to:

- Participant gets a DUI,
- Participant is charged with possession,
- Participant discloses that they have a substance use or mental health barrier.

Scoring UNCOPE/PHQ2

PHQ2 score of 3 or more indicates a need for further assessment.

UNCOPE score of 2 or more indicates a need for further assessment.

Next steps for the PHQ2/UNCOPE

Discuss the results with the participant and find out if they are interested in addressing the mental health or substance use issue as one of their goals.

If yes, offer the participant:

- A referral to the designated substance use/mental health case manager for your district;
- A referral to another provider the participant is open to seeing; or
- Resources on the local provider network for the participant to follow up on their own.

If no, revisit the topic as appropriate during future meetings. Particularly if the participant is not successful in their stated goal, use motivational interviewing techniques to explore if their goal should be revised to include addressing this issue.

Family Support Matrix (FSM)

Information entered into the FSM section of the WORK C panel in ACCESS is gathered through conversations with participants. You may use Stepping Stones to help guide your conversations. Entry should be based on your assessment of the participant's situation and may differ from what the participant is presenting.

There are 13 Participant Life "Domains" we need to report on in ACCESS.

- Shelter
- Transportation
- Food and clothing
- Finance
- Health and safety
- Child development and education
- Social and emotional
- Legal
- Community relations
- Adult education
- Adult employment
- Work skills and habits

From your conversation enter each item as S (strength), N (neutral) or I (interfere). Only update the domains you have received information about. If you are unsure of the status of some domains enter N for neutral (ACCESS will not allow you to leave the field blank).

The FSM should be updated each time there is a change in the participant's circumstance. Every time you meet with the participant, you should look at the FSM to nudge your memory about any potential changes. Enter a case note each time the FSM is updated.

In House Literacy Assessment

Based on your interaction with the participant, did they demonstrate basic skills or understanding of reading, math and comprehension? Should be completed within 30 to 60 days of your first meeting with a participant. Do not rescreen ongoing participants unless there is a change in circumstances. Document your rational in your case notes and update the Literacy Assessment Date in ACCESS.

Case Manager Support

Entering FSM in ACCESS

Pull up case in ACCESS CASE D panel by entering SSN of participant (SSN can be of HOH or 2nd parent depending whose FSM you are updating).

a. FNX->WORK MODE->C SSN for participant you are updating the FSM

```
09/14/17 09:29          IV-A SELECT FUNCTION          SYSTEM  ASTCAL
----- Function Codes (FNX) -----          ----- Function Codes (FNX) -----
ABWD - ABAWD Food Stamp History          MAIL - Send or Read Mail
APPL - Application          MANA - Managed Care Maintenance
CASE - Case Status Display          MONY - Financial Subsystem
CAFN - Case Action Log          NAME - User Name/Number Lookup
CATS - Cost Allocation/Time Study          PCOL - Premium Collections
EDS - Medicaid Management System          PERS - Person Search
ELIG - Eligibility Results/Approval          PMGT - Premium MGT Report
FIAT - Fiat Eligibility          PREM - Premium Management
FUEL - Supplemental Fuel          QUAL - Quality Review
GAEL - General Assistance          RECO - Recoupment Schedule
IDEA - System Change Request          REPT - Report Selection
INFC - Interfaces          SFGC - Special Functions
INQB - Benefit History          STAT - Statement of Need
INQD - Benefit Disbursement History          SUBS - Substitute Reporter/Payee
IV-D - IV-D Select Function          TODO - Daily To-Do Report
JFIP - Jobs For Independence          UNLK - Releases Locked Cases
LOGO - Logoff          VEND - Vendor Search
-----
USER: T05 FNX WORK MODE: C RETGRP: 666 00 7422 PERIOD: 09 17 COMMAND:
                                           PG = MORE
```

Enter "WORK" for function (FNX)

Enter "C" for mode.

Enter the SS# for the participant whose Family Development plan you are creating

Enter current month and year.
Hit enter when done.

b. Move cursor on to FSM box and double click.

```

10/16/17 13:45      *** FAMILY DEVELOPMENT PLAN ***      ASQWOHF1
Participant: SARAH L JOHNSON      SSN: 666-00-7422 Financial Status: Pending
Phone#: 802 555 0000 CELL      Phase: WR 08/01/2017
      Participation Code: 02 NE
Date FDP Signed: 02 02 2017      Review Date: _ _ _ _
Employment Goal: 99-9999.00 Unsubsidized Employment
Case Manager: PCC R64 VACANT RU CASE MAN      FSM      Activity      Matrix
Location: EARLY ED SERVICES      History      History
*****
Strengths/Supports: *Transportation/Health & Safety/Legal/Adult Educat      Click &
Interferes:      Comment

      Job Search/      Education/      Work      Other      Life Skills
      Readiness      Training      Placements      Activities

1,2 of 4      Activity      Hrs/Wk      Start      Target      Act End date      Outcome
Job Search      _ _ _ _      _ _ _ _      09/03/2017      09/16/2017      _ _ _ _      P
CSP Community Service Pro      _ _ _ _      09/01/2017      _ _ _ _      _

USER: T05 FNX: WORK MODE: D RPTGRP: 666 00 7422 PERIOD: 10 17 COMMAND:
DO: Z IMS: D00 REPORTING GROUP: SARAH L JOHNSON
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
Quit Retrn Exit      Print Goal      Hours PgBk      PgFd      CMH      St/Sp      Intrl C&C
  
```

c. The "Assessment Began" does NOT need to be updated at this time. If you get stuck because the FDP date is "Prior to the Assessment Date"—change the Assessment Began date to match the actual FDP Signed date. If you cannot get off of the screen, contact COPS.

```

10/16/17 13:48      *** ASSESSMENT PANEL ***      ASQWOHA1
Participant: SARAH L JOHNSON      SSN: 666-00-7422 Phone#: 802 555 0000 CELL
Financial Status: Pending SP Sex: F Age: 45 Last Grade: 16 Phase: WR 08/01/2017
Assessment Began: 10 03 2017      Case Manager: PCC R64 VACANT RU CASE MAN
***** Family Assessment Summary*****FDP***** Last Updated:10 3 2017
Shelter      I Homeless/living      -
Transportation      S      -      In-House      Completed
Food & Clothing      N      -      Lit/Assess: Y      10 03 2017
Finances      N      -
Health & Safety      S      -      Referrals and Other Agencies
Child Devl & Educ      I No child care av      -      Providing Services
Social & Emotional      I Mental health is      -
Family Interactions      I no family in U.S      -
Legal      S      -
Community Relations      N      -
Adult Education      S      -
Adult Employment      I needs child care      -
Work Skills & Habits      S      -      Referral      FDP      Matrix
      History      History
USER: T05 FNX: WORK MODE: C RPTGRP: 666 00 7422 PERIOD: 10 17 COMMAND:
DO: Z IMS: D00 REPORTING GROUP: SARAH L JOHNSON
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
Quit Retrn Exit      PgBk      PgFd      CMH      Rfrls
  
```

- d. If "I" is entered, ACCESS will automatically give a popup box with list of possible interferences—enter an X next to the interfere that is most appropriate (if no X is entered, the domain will revert back to "N").

```

10/16/17 15:16          *** ASSESSMENT PANEL ***                      ASQWOHAI
Participant: SARAH L JOHNSON      SSN: 666-00-1111  Phone#: 802 555 1111 CELL
Financial Status: Denied SP Sex: F Age: 27 Last Grade: 12 Phase: AP 07/12/2017

Assessment Began:                      Case Manager: PCC
***** Family Assessment Summary*****FDP***** Last Updated: 07 12 17
Shelter                          N                -
Transportation                    S                -           In-House      Completed
Food & Clothing                   N                -           Lit/Assess:  _  _  _  _
Finances                          N                -
Health & Safety                    N                -           Referrals and Other Agencies
Child Devl & Educ                   I                -           Providing Services
Social & Emotional                 N                -
Family Interactions               N                -
Legal                             N                -
Community Relations               N                -
Adult Education                   N                -
Adult Employment                   N                -
Work Skills & Habits               N                -
USER: T05 FNX: WORK MODE: C RPTGRP: 666 00 1111 PERIOD: 10 17 COMMAND:
DO: Z IMS: 084 REPORTING GROUP: SARAH L JOHNSON
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
Quit  Retrnr Exit                      PgBk  PgFd  CMH  Rfrls
  
```

```

10/16/17 15:16          *** ASSESSMENT PANEL ***                      ASQWOHAI
Participant: SARAH L JOHNSON      SSN: 666-00-1111  Phone#: 802 555 1111 CELL
Financial Status: Denied SP Sex: F Age: 27 Last Grade: 12 Phase: AP 07/12/2017

Assessment Began:                      Case Manager: PCC
***** Family Assessment Summary*****FDP***** Last Updated: 07 12 17
Shelter                          N                -
Transportation                    S                -           In-House      Completed
Food & Clothing                   N                -           Lit/Assess:  _  _  _  _
Finances                          N                -
Health & Safety                    N                -           Referrals and Other Agencies
Child Devl & Educ                   I                -           Providing Services
Social & Emotional                 N                -
Family Interactions               N                -
Legal                             N                -
Community Relations               N                -
Adult Education                   N                -
Adult Employment                   N                -
Work Skills & Habits               N                -
USER: T05 FNX: WORK MOD           |
DO: Z IMS: 084 REPORTIN          |
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
Quit  Retrnr Exit                      PgBk  PgFd  CMH  Rfrls
  
```

```

+----Interferes for Child Devl & Educ----
| - Child has IEP
| - Disabled child
| X No child care available
| - Serious behavioral problems
| - Serious developmental delays
| - Other enter comments below
  
```

- e. Domains listed as strengths will automatically be pulled into the FDP when printed. Domains listed as neutrals are not sent to the FDP. ***It is recommended that domains listed as interferes not be sent to the FDP.***

|  <p>VERMONT AGENCY OF HUMAN SERVICES</p> | <p>Department for Children and Families Economic Services Division</p> | | | | | | | | |
|--|--|------------|------------|-------|--------|---------------------|----|------------|------------|
| <p>APPLICATION/DOCUMENT PROCESSING CTR 280 STATE DRIVE WATERBURY VT 05676-9944</p> | <p>Questions? Call ESD Benefit Service Center at 800-479-6151</p> | | | | | | | | |
| <p>Family Development Plan for .</p> | | | | | | | | | |
| <p>Employment Goal: Social/Human Svc Aide</p> | <p>Participant Phone</p> | | | | | | | | |
| <p>Note: You are currently deferred from the work requirement. This deferment ends on 08/31/2019. At that time, you will be required to meet your full work requirement.</p> | | | | | | | | | |
| <p>Family Strengths and Supports:</p> | | | | | | | | | |
| <p>Transportation, Child Development and Education and Legal.</p> | | | | | | | | | |
| <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Activity</th> <th style="text-align: center;">Hours</th> <th style="text-align: center;">Start</th> <th style="text-align: center;">Target</th> </tr> </thead> <tbody> <tr> <td>Employment Team/CWS</td> <td style="text-align: center;">01</td> <td style="text-align: center;">08/14/2019</td> <td style="text-align: center;">11/30/2019</td> </tr> </tbody> </table> | | Activity | Hours | Start | Target | Employment Team/CWS | 01 | 08/14/2019 | 11/30/2019 |
| Activity | Hours | Start | Target | | | | | | |
| Employment Team/CWS | 01 | 08/14/2019 | 11/30/2019 | | | | | | |
| <p>Tasks:</p> | | | | | | | | | |

- g. It is best practice to hit Enter one more time to return to WORK C screen and check the FSM to make sure your changes were saved.

Entering In-House Literacy Assessment in ACCESS

1. FNX->WORK MODE->C SSN for participant you are updating the In-House Literacy Assessment

The screenshot shows the main menu of the ACCESS system. Below the menu, the user has entered the following command: `USER: T05 FNX WORK MODE: C RPTGRP: 666 00 7422 PERIOD: 09 17 COMMAND: F8 = MORE`. Four callout boxes with arrows point to the input fields:

- Enter "WORK" for function (FNX)
- Enter "C" for mode.
- Enter the SS# for the participant whose Family Development plan you are creating
- Enter current month and year. Hit enter when done.

2. Move cursor on to FSM box and double click.

The screenshot displays the Family Development Plan (FDP) screen for participant SARAH L JOHNSON. The screen shows various details including the date signed, employment goal, case manager, and strengths/supports. At the bottom, there are several menu options, with the **FSM** box highlighted by a red circle.

Participant: SARAH L JOHNSON SSN: 666-00-7422 Financial Status: Pending
 Phone#: 802 555 0000 CELL Phase: WR 08/01/2017
 Participation Code: 02 NE
 Date FDP Signed: 02 02 2017 Review Date: _ _ _ _
 Employment Goal: 99-9999.00 Unsubsidized Employment
 Case Manager: PCC R64 VACANT RU CASE MAN
 Location: EARLY ED SERVICES
 Strengths/Supports: *Transportation/Health & Safety/Legal/Adult Educat Click & Comment
 Interferes:

Job Search/Readiness Education/Training Work Placements Other Activities Life Skills

| 1,2 of 4 | Activity | Hrs/Wk | Start | Target | Act End date | Outcome |
|---------------------------|----------|--------|------------|------------|--------------|---------|
| Job Search | | | 09/03/2017 | 09/16/2017 | | P |
| CSP Community Service Pro | | | 09/01/2017 | | | - |

USER: T05 FNX: WORK MODE: D RPTGRP: 666 00 7422 PERIOD: 10 17 COMMAND: _
 DO: Z IMS: D00 REPORTING GROUP: SARAH L JOHNSON
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
 Quit Retrn Exit Print Goal Hours PgBk PgFd CMH St/Sp Intrf C&C

3. Please a Y next to "In-house Lit/Assess" and the date completed.

```
10/16/17 13:48          *** ASSESSMENT PANEL ***          ASQWOHA1
Participant: SARAH L JOHNSON          SSN: 666-00-7422  Phone#: 802 555 0000 CELL
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***** Family Assessment Summary*****FDP***** Last Updated: 10 3 2017
Shelter                I Homeless/living          -
Transportation         S                          -
Food & Clothing        N                          -
Finances               N                          -
Health & Safety        S                          -
Child Devl & Educ      I No child care av       -
Social & Emotional     I Mental health is       -
Family Interactions    I no family in U.S       -
Legal                 S                          -
Community Relations   N                          -
Adult Education        S                          -
Adult Employment      I needs child care       -
Work Skills & Habits   S                          -
Referrals and Other Agencies Providing Services
In-House Completed
Lit/Assess: Y 10 03 2017
Referral History      FDP Matrix History
USER: T05 FNX: WORK MODE: C RPTGRP: 666 00 7422 PERIOD: 10 17 COMMAND:
DO: Z IMS: D00 REPORTING GROUP: SARAH L JOHNSON
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
Quit Retrn Exit          PgBk PgFd CMH Rfrls
```