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| **Red Guides** |
| **Co-occurring**  **Disorders** |
| **Drug Dealers** |
| **Engaging**  **Prosocial Others** |
| **Female**  **Offenders** |
| **Impaired Driving** |
| **Intimate Partner**  **Violence** |
| **Involving**  **Families** |
| **Managing Sex**  **Offenders** |
| **Mental Health** |
| **Meth Users** |
| **Reentry** |
| **Responding to**  **Violations** |
| **Violence and**  **Lethality** |

**Instructions:** Please complete the rating form below for each recorded EPICS session. Refer to the scoring manual as you proceed and note specific strengths and areas for improvement. **When using the N/A response do not add that question into the calculations of the total scores for that section.**

|  |  |  |  |
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| **Session Information** | | | |
| Session date: |  | Staff’s name: |  |
| Review date: |  | Reviewer’s name: |  |
| Caseload number: |  | Client’s name: |  |
| Session length (mins): |  | Client SID#: |  |

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| **ADDITIONAL INFORMATION** | | | | | | |
| Client DOB: |  | Client gender: | Male Female Other *\_\_\_\_\_\_\_\_\_\_* | | | |
| Client race: |  | | | | | |
| Was this the client’s first meeting with this staff person? | | | | Yes | No | N/A |
| Was the client homeless at the time of the session? | | | | Yes | No | N/A |
| Did the client seem to be in a state of agitation, crisis, or acute need? | | | | Yes | No | N/A |

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| **RATINGS QUICK SUMMARY** | | | |
| **Coders, return to this summary table after completing the remainder of the form. Enter section scores into the appropriate boxes below.** | | | |
| **Section** | **Score** | **Summaries** | **Score** |
| CHECK IN (C) |  | **OVERALL SESSION SCORE = (Sum of all section scores)/6 \*Overall score ranges from 0 to 4 \*** |  |
| REVIEW (R) |  |
| INTERVENTION (I) |  | **Number of EPICS components with score >2.0 (C, R, I, H only)**  **\*This is only including Check in, Review, Intervention, and Homework\*** |  |
| HOMEWORK (H) |  |
| BEHAVIORAL PRACTICES |  | **% of EPICS components with score >2.0 (C, R, I, H only)**  **\*This is only including Check in, Review, Intervention, and Homework\*** |  |
| GLOBAL PRACTICES |  |
| **In bullet points list the top staff strengths based on the session:** | |  | |
| **In bullet points list the most critical areas for staff improvement based on the session:** | |  | |
| **Completed \_\_\_\_ EPICS sessions out of \_\_\_\_\_\_ office visits in the last 6 months = \_\_\_\_\_%** | | | |
| **Your next tape is due \_\_\_\_\_\_\_\_\_\_\_\_** | | | |
| **Please enter additional comments in the space below** | | | |
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| **CASE MANAGEMENT PRACTICES/OMS** | | | | | | | |
| **Please select criminogenic needs identified in assessment and targeted in behavior change plans** | ***Needs Identified in Assessment*** | | | | ***Needs Targeted in Behavior Change Plans*** | | |
|  | **First Plan** | | **Second Plan** | | **First Plan** | | **Second Plan** |
| Pro-criminal attitude/orientation |  | |  | |  | |  |
| Companions |  | |  | |  | |  |
| Antisocial pattern |  | |  | |  | |  |
| Education/Employment |  | |  | |  | |  |
| Family/Marital |  | |  | |  | |  |
| Alcohol/Drug problem |  | |  | |  | |  |
| Leisure/Recreation |  | |  | |  | |  |
| Criminal History |  | |  | |  | |  |
| Other criminogenic need |  | |  | |  | |  |
|  | | | | | | | |
|  | | **Yes** | | **No** | | **N/A** | |
| Risk assessment is current | |  | |  | |  | |
| LS/CMI checklist is current | |  | |  | |  | |
| BCP’s are entered into OMS | |  | |  | |  | |
| Road Map of interventions in the BCP’s | |  | |  | |  | |
| Intervention and homework from the session entered in BCP’s | |  | |  | |  | |
| Intervention used targets the criminogenic needs of the client | |  | |  | |  | |
| Action Plan completed in OMS | |  | |  | |  | |
| Action Plan focused on behavior change | |  | |  | |  | |
| Homework assigned is entered into the action plan | |  | |  | |  | |
| EPICS chrono completed EPICS Keyword used in chrono | |  | |  | |  | |
| **Please enter additional comments in the space below** | | | | | | | |
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| **DEMONSTRATED SKILLS FOR QUARTERLIES**  **On Quarterlies** |
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| **GOALS** | | | | | | | | | |
| **Last Goal(s):** | | | **Current Goal(s):** | | | | | | |
| **CHECK IN/ENGAGE** | | | | | | | |
| **Total Time Spent:** | | | Missed Opportunity  (0) | (1) | (2) | (3) | Most  Proficient  (4) |
| **C1) Promoted a collaborative relationship/rapport with client**  Ask about key areas of the client’s life  Set the tone by being genuine  Set the tone by being collaborative  Set the tone by showing concern and empathy  Set the tone by engaging client  Use the relationship skills of active listening and giving feedback | | |  |  |  |  |  |
| **C2) Assessed crisis/acute needs**  Ask the client how they are doing at the beginning of the session  Ask a question(s) to assess for crisis/acute needs, significant changes, or anything bothering them  If an active need/crisis was identified, listen and respond with concern | | |  |  |  |  |  |
| **C3) Assessed for compliance with conditions**  Inquire about the client’s compliance with major conditions of supervision  Note any areas of concern that need to be addressed later in the session  N/A | | |  |  |  |  |  |
| **CALCULATE AND WRITE IN TOTAL CHECK IN SCORE =**  **(C1+C2+C3)/3** | **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | | | | | | |
| **COMMENTS** | | | | | | | |
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| **REVIEW/FOCUS** | | | | | | | |
| **Time Stamp:** | **Total Time Spent:** | | Missed Opportunity  (0) | (1) | (2) | (3) | Most  Proficient  (4) |
| **R1) Set or reviewed short and long term goals**  Work with the client to identify short and long term goals  If establishing goals, work with the client to identify why the goals are important  If goals have already been established, check the progress in meeting the goals  Offer feedback to the client about the progress (or lack of progress)  Work with the client to identify any potential/actual barriers | | |  |  |  |  |  |
| **R2) Discussed community agency referrals**  N/A  Inquire about progress if client is participating in a community based program  Assess for any barriers that may prevent the client from participating in the referral program  Inquire about what the client is learning in the community based program | | |  |  |  |  |  |
| **R3) Enhanced learning through repetition and feedback**  N/A Does the staff do any the following?  Review interventions taught in previous sessions  Clarify concepts related to previous interventions  Reinforce understanding and comprehension | | |  |  |  |  |  |
| **R4) Reviewed homework from the previous session** N/A  Ask the client to report out on the homework assignment  Clarify terms and concepts the client was unclear about in the homework  Provide feedback regarding the homework | | |  |  |  |  |  |
| **CALCULATE AND WRITE IN TOTAL REVIEW SCORE = (R1+R2+R3+R4)/(4 - #N/A)** | | **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | | | | | |
| **COMMENTS** | | | | | | | |
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| **INTERVENTION/EVOKE** | | | | | | | | | |
| **Find and review the intervention used in the session and delete unused interventions. Once you have reviewed the intervention, return to this Intervention/Evoke summary and provide a final score.** | | | | | | | | | |
| **Time Stamp:** | **Total Time Spent:** | **Intervention Focus:** | | | | | | | |
| **Time Stamp:** | | | | | | | |
| **Potential areas of focus:** | | | | Missed Opportunity  (0) | (1) | (2) | (3) | Most  Proficient  (4) | |
| i1) Used an appropriate intervention | | | |  |  |  |  |  | |
| i2) Completed the steps of the intervention | | | |  |  |  |  |  | |
| i3) Used the intervention effectively | | | |  |  |  |  |  | |
| **CALCULATE AND WRITE IN TOTAL INTERVENTION SCORE**  **= (i1+i2+i3)/3** | | | **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | | | | | | |
| **COMMENTS** | | | | | | | | | |
|  | | | | | | | | | |
|  | | | | | | | | | |
| **Behavior Chain/ABC Model** | | | | | | | | |
| Introduced the intervention | | | | | | | | |
| Discussed the importance or usefulness of the intervention | | | | | | | | |
| Explained the different components of the intervention  Situation  Thoughts  Feelings  Behavior  Consequences | | | | | | | | |
| Emphasized how the components are linked together | | | | | | | | |
| Discussed how thoughts are linked to situations based on core values and beliefs | | | | | | | | |
| Worked with the client to apply the tool to a specific situation and identified the clients:  Situation  Thoughts  Feelings  Behavior  Consequences | | | | | | | | |
|  | | | | | | | | | |
| **Restructuring of the Behavior Chain** | | | | | | | | |
| Introduced cognitive restructuring / tapes and counters thoughts | | | | | | | | |
| Discussed the importance or usefulness of restructuring | | | | | | | | |
| Taught the client how to identify specific pro-social replacement thoughts for negative thoughts | | | | | | | | |
| Worked with the client to apply restructuring to the specific situation and identified the clients:  Situation  Thoughts  Feelings  Behavior  Consequences | | | | | | | | |
| Summarized the results | | | | | | | | |
|  | | | | | | | | | |
| **Cognitive Restructuring** (Tapes and Counters or Thinking Report) | | | | | | | | |
| Introduced the intervention | | | | | | | | |
| Discussed the importance or usefulness of the intervention | | | | | | | | |
| Helped the client recognize risky, anti-social thoughts | | | | | | | | |
| Helped the client replace risky, anti-social thoughts with pro-social thoughts | | | | | | | | |
| Modelednew pro-social thoughts | | | | | | | | |
| Had the client role play/ practice the new restructured thoughts | | | | | | | | |
| Gave the client feedback about the role play/practice | | | | | | | | |
|  | | | | | | | | | |
| **Cost Benefit Analysis** | | | | | | | | |
| Introduced the intervention | | | | | | | | |
| Discussed the importance or usefulness of the intervention | | | | | | | | |
| Explained the different components of the intervention  (+) Consequences  (-) Consequences  Short term  Long term | | | | | | | | |
| Helped the client to recognize situations or decisions in which the CBA could be used | | | | | | | | |
| Helped the client brainstorm pros and cons of chosen negative situation or decision | | | | | | | | |
| Helped the client complete a CBA on an alternative pro-social behavior | | | | | | | | |
| Helped the client brainstorm pros and cons of the alternative situation or decision | | | | | | | | |
| Helped the client summarize the results of the CBA | | | | | | | | |
|  | | | | | | | | | |
| **Skill Building or Problem Solving** | | | | | | | | |
| ***List: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*** | | | | | | | | |
| Introduced the skill | | | | | | | | |
| Discussed the importance or usefulness of the skill | | | | | | | | |
| Taught and explained the different steps of the skill | | | | | | | | |
| Elicited client input on the skill steps | | | | | | | | |
| Applied the skill to a specific situation of the client | | | | | | | | |
| Modeled the skill | | | | | | | | |
| Had the client role play/practice the skill with the specific situation | | | | | | | | |
| Provided feedback to the client about the role play/skill practice | | | | | | | | |
|  | | | | | | | | | |
| **Carey Guide/Carey BIT** | | | | | | | | |
| ***List Carey Guide/BIT intervention: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*** | | | | | | | | |
| Introduced the intervention | | | | | | | | |
| Discussed the importance or usefulness of the intervention | | | | | | | | |
| Walked through the steps/questions of the intervention using an example *(Model)* | | | | | | | | |
| Provided an opportunity for the client to walk through some of the questions before assigning it as homework *(Role Play)* | | | | | | | | |
| Provided feedback to the client about the new skill being used | | | | | | | | |
| Provided instructions in a clear manner | | | | | | | | |
|  | | | | | | | | | |
| **Other Intervention** (Decisional Balance, T4C interventions, MIO/EPICS interventions, etc.) | | | | | | | | |
| ***List other intervention: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*** | | | | | | | | |
| Introduced the intervention | | | | | | | | |
| Discussed the importance or usefulness of the intervention | | | | | | | | |
| Taught and explained the different components/steps | | | | | | | | |
| Applied the different components/steps to a specific situation | | | | | | | | |
| Modeledthe intervention for the client | | | | | | | | |
| Had the client practice use of the intervention | | | | | | | | |
| Provided feedback to the client on use of the intervention (reinforcement or constructive feedback) | | | | | | | | |
|  | | | | | | | | | |
| **Graduated Rehearsal** | | | | | | | | |
| ***List intervention: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*** | | | | | | | | |
| Practiced a previously taught intervention again but in a different situation | | | | | | | | |

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| **HOMEWORK/PLAN** | | | | | | | |
| **Time Stamp:** | **Total Time Spent:** | | | | | | |
| **Homework Assigned**: | | | Missed Opportunity  (0) | (1) | (2) | (3) | Most  Proficient  (4) |
| **H1) Generalized the skill learned**  Does staff do any of the following?  Ask the client what other situations the intervention could be helpful  Ask the client how the skill can be used in other situations  Ask the client situations in the past that this skill could have been helpful | | |  |  |  |  |  |
| H2) Assigned appropriate homework  Assign homework targeting a specific criminogenic need  Assign homework connected to the intervention taught  Give the client clear expectations how to complete the homework and when it is due  Identify or assign a specific situation | | |  |  |  |  |  |
| **CALCULATE AND WRITE IN TOTAL HOMEWORK SCORE = (H1+H2)/2** | | **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | | | | | |
| **COMMENTS** | | | | | | | |
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| **BEHAVIORAL PRACTICES SUMMARY** | | | | | | | | |
| **Please find and review specific behavioral practices (ER, ED, EUA) from the next table. Using the manual for reference be sure to note strengths and weaknesses for each behavioral practice in the comments box. When you have reviewed each type of behavioral practice, return to this summary table and determine an overall behavioral practices score.** | | | | | | | | |
| **Time Stamp:** | **Target:** | | | | | | | |
|  | | | Missed Opportunity  (0) | (1) | (2) | (3) | Most  Proficient  (4) | |
| B1) Used appropriate behavioral practices | | |  |  |  |  |  | |
| B2) Completed the components of the behavioral practice | | |  |  |  |  |  | |
| B3) Used behavioral practices effectively | | |  |  |  |  |  | |
| **CALCULATE AND WRITE IN TOTAL BEHAVIORAL PRACTICES SCORE = (B1+B2+B3)/3** | | **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | | | | | | |
|  | | | | | | | |
| **Effective Reinforcement  Missed opportunity** | | | | | | | |
| Reinforced the pro-social behavior or comment | | | | | | | |
| Explained why they reinforced what was said or did (providing specific reasons) | | | | | | | |
| Explored the short term and long term benefits of continuing pro-social behavior | | | | | | | |
| **Potential opportunities for reinforcement:** | | | | | | | |
| **COMMENTS** | | | | | | | |
|  | | | | | | | |
|  | | | | | | | |
| **Effective Disapproval  Missed opportunity** | | | | | | | |
| Disapproved of anti-social behavior or comment | | | | | | | |
| Explained why they disapproved of what was said or did (providing specific reasons) | | | | | | | |
| Explored the short term and long term consequences of continuing anti-social behavior | | | | | | | |
| Discussed and identified prosocial alternatives that could be used in place of the unacceptable behavior | | | | | | | |
| **Potential opportunities for disapproval:** | | | | | | | |
| **COMMENTS** | | | | | | | |
|  | | | | | | | |
|  | | | | | | | |
| **Effective Use of Authority  Missed opportunity** | | | | | | | |
| Focused on behavior | | | | | | | |
| Kept a calm voice | | | | | | | |
| Specified choice and attendant consequences | | | | | | | |
| Used role clarification N/A | | | | | | | |
| **Potential opportunities for use of authority:** | | | | | | | |
| **COMMENTS** | | | | | | | |
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| **GLOBAL PRACTICES** | | | | | | | | |
| **Please identify criminogenic needs that were targeted during the EPICS session (select any that apply)** | | | | | | | | |
| Pro-criminal attitude/orientation | Family/Marital | | | Leisure/Recreation | | | | |
| Companions | Alcohol/Drug Problem | | | Criminal History | | | | |
| Anti-social pattern | Education/Employment | | | Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | |
|  | | | | | | | | |
|  | | | Missed Opportunity  (0) | | (1) | (2) | (3) | Most  Proficient  (4) |
| G1) Targeted criminogenic needs | | |  | |  |  |  |  |
| G2) Focused on primary criminogenic need | | |  | |  |  |  |  |
| G3) Spent more time on criminogenic needs than other needs | | |  | |  |  |  |  |
| G4) Made appropriate referrals to outside agencies N/A | | |  | |  |  |  |  |
| G5) Integrated relapse prevention techniques for offending behavior  N/A | | |  | |  |  |  |  |
| G6) Completed session of adequate length | | |  | |  |  |  |  |
| G7) Communicated with client in a respectful manner | | |  | |  |  |  |  |
| G8) Communicated information to the client in a clear and concise manner | | |  | |  |  |  |  |
| G9) Elicited and gave appropriate feedback | | |  | |  |  |  |  |
| G10) Utilized role clarification  N/A | | |  | |  |  |  |  |
| **CALCULATE AND WRITE IN TOTAL INTERVENTION SCORE = (G1+G2+G3+G4+G5+G6+G7+G8+G9+G10)/(10 - #N/A)** | | **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | | | | | | |
| **Please enter additional comments in the space below** | | | | | | | | |
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| **MOTIVATIONAL INTERVIEWING PRACTICES** | | | | | | | | | | |
| **Behavior Counts** | | | | | | | | | | |
| **MI Adherence –**  **Beginning competency is 90% and**  **proficiency is 100%** | | | | | | | | | | |
| **Giving Information:** | **MI Adherent:** | | **MI non-adherent:** | | | | **Total %:** | | | |
| **% of Open Ended Questions –**  **Beginning competency is 50% or more**  **proficiency is 70% or more** | | | | | | | | | | |
| **Open:** | | **Closed:** | | | **% of open ended:** | | | | | |
| **% of Complex Reflections -**  **Beginning competency is 40% or more**  **proficiency is 50% or more** | | | | | | | | | | |
| **Complex:** | | **Simple:** | | | **% of complex:** | | | | | |
| **% of Questions Divided by Reflections - Striving for 2:1 or 200%:** | | | | | | | | | | |
| **% of Questions Divided by Reflections:** | | | | | | | | | | |
| **Four Processes of MI** | | | | | | | | | | |
| **Engagement happened?**  Yes No | **Focusing happened?**  Yes No | | **Evoking happened?**  Yes No | | | | ***Planning happened?***  Yes No | | | |
| **Global Ratings** | | | | | | | | | | |
| **Technical components** | | | | LOW  (1) | | (2) | | (3 | (4) | HIGH  (5) |
| Cultivating change talk | | | |  | |  | |  |  |  |
| Sidestepping sustain talk | | | |  | |  | |  |  |  |
| **Relational components** | | | | LOW  (1) | | (2) | | (3 | (4) | HIGH  (5) |
| Partnership | | | |  | |  | |  |  |  |
| Empathy | | | |  | |  | |  |  |  |
| **Please enter additional comments in the space below** | | | | | | | | | | |
|  | | | | | | | | | | |