

QUARTERLY CONTRACT MONITORING REPORT (QCMR)
CONSUMER MOVEMENT REPORT
PACT (Revised 09-30-2013)

USTF PROJECT CODE:	CALENDAR YEAR OF REPORT <input style="width: 100px; height: 20px;" type="text"/> REPORTING QUARTER: (CHECK ONE):				
NAME OF AGENCY:	JULY 1 TO SEPTEMBER 30 1 <input type="checkbox"/>				
NAME OF PROGRAM (Complete a Separate QCMR Form for each PACT Team):	OCTOBER 1 TO DECEMBER 31 2 <input type="checkbox"/>				
PERSON COMPLETING FORM / PHONE #:	JANUARY 1 TO MARCH 31 3 <input type="checkbox"/>				
DATE SUBMITTED:	APRIL 1 TO JUNE 30 4 <input type="checkbox"/>				
CHECK AGENCY REPORTING QUARTER:	<table style="width: 100%; text-align: center;"> <tr> <td style="width: 25%;">1 <input type="checkbox"/></td> <td style="width: 25%;">2 <input type="checkbox"/></td> <td style="width: 25%;">3 <input type="checkbox"/></td> <td style="width: 25%;">4 <input type="checkbox"/></td> </tr> </table>	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>		

CASELOAD

1.	2.	3.	4.	5.	6.
Beginning Caseload (First Day of Qtr.)	New Enrollees to Program Element During Qtr.	Transfers In to Program Element During Qtr.	Transfers From Program Element During Qtr.	Terminations From Program Element During Qtr.	Ending Caseload (Last Day of Qtr.)

7. **Target Caseload (Capacity Caseload):**

8. **Terminations Related to Functional Improvement:**

9. **Of the Ending Caseload, how many individuals are:**

9A. **Medicaid/Familycare enrolled:**

9B. **Non-Medicaid/Familycare enrolled:**

(Note: The sum of 9A + 9B must equal ending caseload, as indicated in Item 6, (the Ending Caseload on the Last day of the Quarter):

FACE-TO-FACE HOURS (UNITS OF SERVICE)

10. Number of Face-to-Face Hours Delivered On-Site:

11. Number of Face-to-Face Hours Delivered Off-Site:

12. Number of Face-to-Face Hours Delivered on Behalf of Consumer:

13. Total Face-to-Face Hours Delivered During the Quarter:
 (Sum # 10, 11, and 12. This value is auto-calculated).

13A. Of the Total **Hours of Service (from item 13)**, how many were
 Delivered in the Group Modality:

13B. Of the Total **Hours of Service (from item 13)**, how many were
 Delivered in the Individual Contact Modality:

(Note: the sum of 13A + 13B must equal the value in Item 13)

CONSUMER OUTCOMES

14. Please report the # of Enrolled Consumers (From the ending caseload) who, were/used:

	DURING ANY POINT IN THE QUARTER	LAST DAY OF THE QUARTER
14A. In a psychiatric in-patient unit:	<input type="text"/>	<input type="text"/>
14B. Incarcerated:	<input type="text"/>	<input type="text"/>
14C. Homeless:	<input type="text"/>	<input type="text"/>
14D. Designated Screening Services:	<input type="text"/>	NA
14E. In Formal Education Program:	<input type="text"/>	<input type="text"/>
14F. Other Employment:	<input type="text"/>	<input type="text"/>
14G. Competitive Employment:	<input type="text"/>	<input type="text"/>

EMPLOYMENT & EDUCATION MOVEMENT TABLE

15. Record the number of consumers from the ending caseload in the appropriate box.

BEGINNING OF Quarter	End of Quarter			
	No Activity	Some Activity	Other Employment/ Enrolled in Education Program	Competitive Employment
No Activity				
Some Activity				
Other Employment/ Enrolled in Education Program				
Competitive Employment				

15A. Number of Consumers (Ending Caseload), who are retired:

Note: Total from all sixteen boxes in Item 15, plus number of consumers who are retired (Item 15A) must equal Ending Caseload (Item 6).

15 B. Weighted Team Employment and Education Movement Score:
(This value is auto-calculated.)

STAFFING

16. Please record staffing information (See instructions below as needed):

(Staffing Position)	CONTRACTED # of FTE	DAYS IN QUARTER POSITION WAS FILLED
Psychiatrist	<input type="text"/>	<input type="text"/>
Advance Practice Nurse	<input type="text"/>	<input type="text"/>
Clinician	<input type="text"/>	<input type="text"/>
Registered Nurse	<input type="text"/>	<input type="text"/>
Substance Abuse Specialist	<input type="text"/>	<input type="text"/>
Vocational Specialist	<input type="text"/>	<input type="text"/>
Mental Health/Wellness Specialist	<input type="text"/>	<input type="text"/>
Peer Mental Health Specialist	<input type="text"/>	<input type="text"/>
Other (Specify): <input type="text"/>	<input type="text"/>	<input type="text"/>
Other (Specify): <input type="text"/>	<input type="text"/>	<input type="text"/>
Other (Specify): <input type="text"/>	<input type="text"/>	<input type="text"/>
Secretary	<input type="text"/>	<input type="text"/>
TOTAL (Direct Care) [Secretary excl.]	<input type="text"/>	<input type="text"/>

16A. Number of hours per week Psychiatrist provided to the PACT Team per NJAC 10:37J-2.8(d)1:

17. Total Staff Hours (In Transit):

DEFINITIONS and INSTRUCTIONS

1. **Beginning Caseload (First Day of Qtr.):** Refers to the PACT Team's caseload on the first day of the reporting period.
2. **New Enrollees to Program Element During Qtr.:** Refers to the number of consumers, (exclusive of transfers-in) for whom a case was opened by the PACT Team during the quarter.
3. **Transfers In to Program Element During Qtr.:** Refers to the number of consumers enrolled by the PACT team during the quarter who were transferred directly from another PACT team.

NOTE: Item 2 and Item 3 are mutually exclusive.

4. **Transfers From Program Element During Quarter:** Refers to the number of consumers transferred directly to another PACT Team.
5. **Terminations From Program Element During Qtr.:** Refers to the number of consumers, (exclusive of transfers-out) for whom a case was closed by the PACT Team during the quarter.

NOTE: Item 4 and Item 5 are mutually exclusive.

6. **Ending Active Caseload (Last Day of Qtr.):** Refers to the PACT Team's caseload on the last day of the reporting period.
7. **Target Caseload (Capacity Caseload):** Refers to the maximum number of enrollees that a PACT Team can serve at any one time. Information must correspond to the agency's contractual terms, per the Annex A.
8. **Terminations Related to Functional Improvement:** Refers to terminations in which the consumer has evidenced functional improvement (e.g. no in-patient psychiatric hospital use) over the course of at least two years and has been successfully transferred and linked to a mental health program that is less intensive than PACT. (Partial care/hospitalization programs and intensive supportive housing programs are not considered less intensive than PACT for the purpose of this definition).

9A. Record the number of consumers from the ending caseload who are Medicaid/Familycare enrolled.

9B. Record the number of consumers from the ending caseload who are not Medicaid/Familycare enrolled.

Note: The sum of 9A+9B must equal the value of Item 6 (Ending Caseload on the Last Day of the Quarter)

10. **Number of Face-to-Face Hours Delivered On-Site:** Refers to the cumulative face-to-face contact time (in hours) that all consumers received from PACT staff at the PACT office location. *[Does not include telephone contact time; 60 minutes of face-to-face service provided to one 1 consumer = 1 hour of face-to-face service, irrespective of how many staff are present; (e.g. One staff provides a one hour group session to four consumers = 4 Hours of Face-to-Face Service; Two staff provides a one hour group session to four consumers = 4 Hours of Face-to-Face Service). No rounding (e.g. from 50 minutes to 1 hour) is permitted. 45 minutes of face-to-face service provided to one 1 consumer = .75 hour of face-to-face service.]* Record and sum actual duration of each face-to-face contact to produce cumulative total face-to-face hours.
11. **Face-to-face off-site contact hours with consumers:** Refers to the cumulative face-to-face contact time (in hours) that all consumers received from PACT staff outside of the PACT team office location. *[Does not include telephone contact time; 60 minutes of face-to-face service provided to one 1 consumer = 1 hour of face-to-face service, irrespective of how many staff are present; (e.g. One staff provides a one hour group session to*

four consumers = 4 Hours of Face-to-Face Service; Two staff provides a one hour group session to four consumers = 4 Hours of Face-to-Face Service). No rounding (e.g. from 50 minutes to 1 hour) is permitted. 45 minutes of face-to-face service provided to one 1 consumer = .75 hour of face-to-face service.] Record and sum actual duration of each face-to-face contact to produce cumulative total face-to-face hours.

12. **Number of Face-to-Face Hours Delivered on Behalf of Consumers:** Refers to the cumulative face-to-face contact time (in hours) on-site and off-site contact time spent with a person other than the consumer by PACT team staff member(s). Includes family members, significant others, landlords, and other service providers and community entities as long as the activity is directly related to the consumer's treatment plan. *[Does not include telephone contact time; 60 minutes of face-to-face service provided to one 1 consumer = 1 hour of face-to-face service, irrespective of how many staff are present: (e.g. One staff provides a one hour group session to four consumers = 4 Hours of Face-to-Face Service; Two staff provides a one hour group session to four consumers = 4 Hours of Face-to-Face Service). No rounding (e.g. from 50 minutes to 1 hour) is permitted. 45 minutes of face-to-face service provided to one 1 consumer = .75 hour of face-to-face service.]*
13. **Total Face-to-Face Hours Delivered During the Quarter:** This field is auto-calculated (Sum of items 10, 11, 12).
- 13A. **Hours (Units) of Service Delivered in Group Modality:** Is a subtotal of *Total Hours of Service (Units)* (Item 13): Refers to the number of hours delivered in the group modality. If one staff member runs a 1 hour group activity, each consumer in the group would be counted as receiving 1 hour of face-to-face contact, up to a limit of six consumers.
- 13B. **Hours (Units) of Service Delivered in Individual Contact Modality:** Is a subtotal of *Total Hours of Service (Units)* (Item 13): Refers to the number of hours delivered in individual contacts.
- Note: The sum of Item 13A + 13B must equal the value in Item 13.
- 14A. **Psychiatric in-patient unit.** Refers to all hospital based psychiatric beds/units that provide 24 hour care and supervision.
- 14B. **Incarcerated.** Refers to a municipal, county or state correctional facility.
- 14C. **Homeless.** Refers to having no housing. This includes individuals who are temporarily living in a hotel, motel or shelter.
- 14D. **Designated Screening Services** – refers to State designated Psychiatric Emergency Program that has authority to initiate civil commitment process. Includes mobile services offered by a designated screening program.
- 14E. **Formal Educational Program:** Refers to enrollment in any type of school based program such as GED prep, college, trade school, adult education at local high school.
- 14F. **Other employment** - Refers to unpaid, transitional, volunteer, “Off-The-Books,” regular caretaker activity, or any other type of employment other than competitive employment.
- 14G. **Competitive employment:** To be considered **competitive employment**, the job must meet the following criteria: 1) Pays Minimum wage or higher; 2) At least 2 hours per week; 3) Open to all community members (i.e., non-disabled persons are able to apply and get the job, as well). Consumers who work “under the table” or “off the books” cannot be included in this count.
- 14H. **Total of 14A through 14G** (Auto-calculated value): This is the auto-calculated sum of Items 14A through 14G.
Note: The total for any point in the quarter cannot be higher than the beginning caseload plus new

enrollees (e.g., Item 1 + Item 2). The total on the last day of the quarter cannot be higher than the ending caseload (Item 6).

15. **Employment & Education Movement Table:** Categorize all consumer in your ending caseload based on the table. Record the number of consumers within the caseload in the box that reflects their “movement” from the beginning of the quarter to the end of the quarter.

The categories to the left (vertical) indicate the consumer’s vocational/educational status at the beginning of the reporting quarter. The categories found at the top (horizontal) of the table indicate the consumer’s vocational/educational status at the end of the report quarter.

For example, if a consumer began the reporting quarter in the status “No Activity” (See definition below) and then ended the quarter in the “competitive employment” status, this consumer would be counted in the number that would be recorded in the upper right hand cell. Thus, If “5” consumers in the caseload “moved” in this manner (e.g. began the quarter in “No Activity” and progressed to “Competitive Employment”), then a “5” would be entered into in the upper right hand cell to reflect these five consumers within the caseload.

Note: The sum of the entries into all sixteen boxes in Item 15, plus the value of Item 15 A (retirees) should equal the value found in Item 6 “**Ending Caseload (Last Day of Qtr.)**”

To reflect the unique characteristics of a particular team’s caseload, the matrix below shows how these outcomes (movements) are weighted. (The number entered into each box is multiplied by the weighted box-specific number. The resultant number for all sixteen boxes is then summed. Lastly, the sum is divided by the caseload size.) A team-wide *Employment and Education Movement Score* then results (found in Item 15B).

BEGINNING OF Quarter	End of Quarter			
	No Activity	Some Activity	Other Employment/ Enrolled in Education Program	Competitive Employment
No Activity	0	+1	+2	+3
Some Activity	-1	0	+1	+2
Other Employment/ Enrolled in Education Program	-2	-1	0	+1
Competitive Employment	-3	-2	-1	0

No Activity: Refers to the number consumers who display no action or behavior of any sort toward education or employment related goals.

Some Activity – Refers to consumers who have engaged in concrete tasks (e.g. completed an application, developed a resume, went on an interview) related to an education or employment related goals.

Other Employment/ Enrolled in Education Program – See definitions above

Competitive Employment - See definition above

Retired – A PACT consumer who is at least 60 years old and has no interest in employment or education.

15A. **Number of Consumers (Ending Caseload), who are retired:** Indicate the number of consumers on your active PACT caseload who are retired/no longer in the work force.

15B. **Weighted Team Employment and Education Movement Score:** An auto-calculated value based the weighted counts of the values placed in Item 15 (see description of Item 15, above).

16. **Staffing** – Record information per the prompts. Information must correspond to the agency’s contractual terms, per the Annex A and Annex B. Staffing positions that are less than 1.0 Full-time equivalent (FTE) should be reflected as a proportion of an FTE – e.g. 0.25 FTE, 0.5 FTE, etc.

16A. **Number of hours per week Psychiatrist was available** (in hours). In accordance with NJAC 10:37J-2.8(d)1 the psychiatrist’s role is to be reflected as the number of hours per week provided to the PACT team.

17. **Total Staff Hours (In Transit)** – Refers to the total staff time in transportation to and from all consumer related contacts. Does not include time in which a consumer is in the vehicle

Periodic audits of information submitted in this report will be conducted by DMHAS.

09-30-2013