



EASA FIDELITY REVIEW GUIDE

Overview

The fidelity review is a learning and quality improvement process. The purpose of a fidelity review is to discuss and review how your team (individually and as a team/agency) are implementing the EASA Practice Guidelines, including:

- How the participants, families, and supporters experience the services they receive including measurable outcomes
- Honoring successes and achievements
- Making recommendations for areas of improvement and growth for your EASA program and team that could include agency-level recommendations.

Please follow this guide to prepare for your EASA program's fidelity review. This guide will help your team a) collect all of the necessary documents and materials, and b) be familiar with the timeline to be prepared for the review.

What to Expect

- ✓ Fidelity Reviews are scheduled for 2 full consecutive days.
- ✓ At least 2 reviewers from EASA Center for Excellence will visit your site in-person for the fidelity review. Sometimes additional people from C4E, GOBHI, PSU iLab, and/or OHA will join.
- ✓ Your site will participate in the review process once every 2 years or more frequently as needed.

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The EASA Practice Guidelines and Fidelity Assessment tool can be found here:
<https://easacommunity.org/pro-resource/practice-guidelines/>

Fidelity Rating Guide

The EASA Fidelity Assessment Tool will be scored using the following scale:

Fidelity Assessment Scale:

- 1=Organization has **not yet demonstrated awareness** for the need for this component
- 2=Organization has **demonstrated awareness**, but work on this component has not yet begun
- 3=Organization is **actively working to implement** component
- 4=Component is **in place**, but it is not yet sustainable or monitored
- 5=Component is **sustainably in place and monitored** for continuous quality and practice improvement

The review team will gather information from a variety of sources and use it to assign preliminary scores. At the end of the site visit, the preliminary scores will be reviewed and finalized collaboratively with your team.

The goal is to provide you with a one-page snapshot of comparable scores that can be used to identify what areas to prioritize and plan next steps. This scale will also be used to track progress over time in future reports.

EASA Teams may also use this tool to assess their own progress in between our external assessments. EASA Center for Excellence (EASA C4E) reviewers will explain more about this during the visit.

Timeline

This timeline covers three periods: Before the Review, During the Review, and After the Review.

Most EASA teams begin preparing 5 or more weeks before their scheduled fidelity review.

The first step is to identify an EASA team member to lead preparation and communicate with EASA Center for Excellence reviewers about the fidelity review visit. This can—but does not have to be—the supervisor or team lead.

The entire EASA team is involved in the Fidelity Review process. The individual leading preparation is encouraged to ask other team members to contribute to the tasks described in the timeline below.

Before the Review

5+ weeks before

Assign a team member to lead preparation for the review, who will:

- ✓ Ensure all team members and agency leadership staff are familiar with the EASA Practice Guidelines & Fidelity Assessment Tool (2026)
- ✓ Ensure all review participants (including full EASA team, agency leadership staff, and participants/graduates/family members and supports) are available to fully participate in the fidelity review specific to their roles/areas.
 - Encourage as many participants, graduates, and family members to participate as possible.
 - Use [this flyer](#) to recruit and inform participants and family members what to expect in a fidelity review listening session. Enter the Date/Time and Location in the fillable fields near the bottom of the flyer. The QR code leads to an online survey version for those who want to give input but cannot join in-person.
- ✓ Identify a person to set up EHR access and assist with Chart Review
- ✓ Send [Staff Attitudes Survey](#) to all EASA direct service staff
- ✓ Send [Program Characteristics Survey](#) to EASA Team Lead/Supervisor
- ✓ Nursing and Psychiatric care providers complete medical self-study assessments: [Nursing](#); [Psychiatry](#)
- ✓ Organize Material Components (see page 9)
- ✓ Prepare Agenda (see pages 6-8)
- ✓ Ensure REDCap data (Participant and Community Ed and Outreach) is current and up to date for most recent quarter

2+ weeks before

The preparation lead will:

- ✓ Send the Agenda to the C4E lead reviewer and identified support people
- ✓ Confirm date/times with all review participants
- ✓ Material Components finalized and ready for the review
- ✓ Confirm each team member has completed the Staff Attitudes Survey and Team Lead/Supervisor has completed the Program Characteristics Survey
- ✓ Send C4E lead reviewer nursing staff and psychiatric care provider self-study assessments

The chart review lead will:

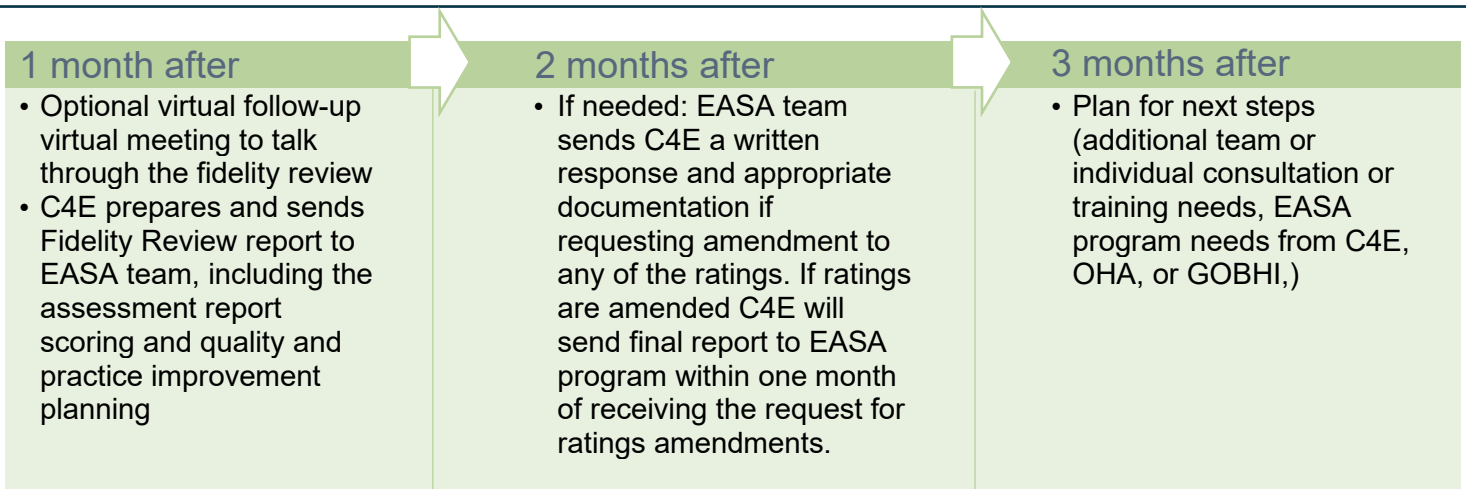
- ✓ Give EHR access to reviewers for at least 3 weeks (2+ weeks prior through 1 week after the review dates)

During the Review

2 Day Fidelity Review

- Team Meeting Observation
- Interview with Team Lead
- Team Discussion & Case Presentations
- Individual/Small Group Discussions (Interview with Team members by Role)
- Agency executive leadership discussions
- Participant & Family Discussions
- Community Education and Outreach Demo
- Chart Review
- Document Review
- Summary of fidelity review/debrief/feedback

After the Review



People Involved & Their Roles

Review Activities	EASA Team	C4E Reviewers
Team Meeting Observation	Full EASA team	Reviewers observe typical meeting process
Practice Discussion – whole group	Full EASA team	Team members present information on 2 participants
Practice Discussion – individual roles	60-minute discussion with provider(s) of each service area*: <ul style="list-style-type: none"> • Team Lead/ Supervisor/ Clinical Supervisor • Case Manager • Screener • Counselors • Peer Support Specialist • Occupational Therapist or sensory/cognitive assessment and support • Medical Providers, LMPs, tele-psychiatrists, prescribers • Nurse • Supported Education Specialist • Supported Employment Specialist • FPE Facilitators <i>*Multiple roles/tasks may be discussed in a single meeting</i>	At least 1 reviewer meets with each role in turn If there are more than 1 EASA team members in a role they can meet together or individually
Practice Discussion – agency executive leadership (60 min)	<ul style="list-style-type: none"> • Executive Director • Quality Improvement Manager • Human Resources Manager • Director • Clinical Supervisor • Communications or Marketing 	Reviewers meet with leadership group
Discussion with EASA participants and family members/supports	<i>*Team members may attend at the request of participants or family members</i>	Reviewers meet 1:1 or in a group per participants/family members preference Online survey also available
Community Education Presentation & Strategic Plan	1+ team member(s) or full team	Reviewers observe presentation and review Community Education & Outreach strategic plan
Chart review	1 team member with EHR access designated ahead of time	Reviewers access chart review 2+ weeks before review through 1 week after review (3 weeks total) if remote access is possible. If remote access is not possible reviewers will complete chart reviews during the 2 day review

Agenda Components & Sample Agenda

The Agenda for the two-day review must include all the elements listed below. Some teams start with their regularly scheduled team meeting and build out the two-day agenda from there, based on the availability of the relevant people involved.

Keep in mind that at least 2 reviewers will visit your site, so some discussions can happen simultaneously, although 1 reviewer will be focused on the chart review.

Don't forget to leave space for breaks and lunch!

The Sample Agenda on pages 7-8 shows one way your team might design the two-day agenda.

Agenda Components

Chart Review

(1 full day for 1 reviewer and 1 team member).

- Plan to have one team member available to set up and walk through remote access to EHR and support reviewers finding data inside the charts. See page 11 for details.
- Please ensure there is access for two weeks prior to and one week after the dates of the review (3 weeks total). Confirm the plan with the reviewers at least 2 weeks ahead of the review date.

Team Meeting Observation

(1 hour)

- Full EASA team must be present
- Follow typical agenda for team meetings---reviewers are present as observers

Practice Discussion: Whole Team

(1 hour)

- One presentation of a current participant and one presentation where the individual was screened out *or* where an individual disengaged after 6-12 months (not due to moving or needing a higher level of care).
- Include information about how family members/supports were included and which team members were involved for each presentation.
- Follow up questions:
What are some strategies your team has used to increase participant retention across interventions?
What are some strategies your team has used to increase family/support system engagement across interventions?
Team reflection: What has your team learned about engagement and retention with participants and family members? How has your team (or how does your team plan to) adjust practices and approaches based on this information?

Individual Practice Discussions

(1 hour ea) with team member(s) in each role.

- Each discussion involves the person or group providing the following service areas*:
 - Team Lead
 - Case Manager
 - Clinician
 - Peer Support Specialist
 - Occupational Therapist
 - Psych Provider/Prescriber
 - Nurse
 - Education Specialist
 - Employment Specialist
 - FPE Facilitators

*Multiple roles/tasks may be discussed in a single meeting

Practice Discussions Preparation

- Each EASA team member will participate in 60-minute discussions focusing on the Practice Guidelines they lead, co-lead, or help implement.
- Each team member has prepared/reviewed their role and current job description
- Each team member can relate their role to all applicable EASA Practice Guidelines
- Each team member can describe and demonstrate specific activities in their work that provide or support the related EASA Practice Guidelines

Agenda Components & Sample Agenda

Discussion with EASA Participants/ Graduates/Family Members/Supports

- (1 hour)
- May be done as a group or individually in person deferring to participant preference. Plan for 60 minutes for a group format (more than one family and/or participant) which will be recorded and transcribed after participants give consent.
- EASA Team members can participate based on family members and individuals' preferences.
- An online survey version should be sent to all individuals who are unable to participate in the in-person listening session and would like to give input and share their experiences

Executive Leadership Practice Discussion

- (1 hour)
- - Executive Director
 - Quality Improvement Manager
 - Human Resources Manager
 - Director
 - Clinical Supervisor

Community Education Presentation Demo

- (1 hour)
- Mock/Video presentation OK if no live presentation is scheduled
- 1+ team members or full team can demonstrate

Sample Agenda

EASA Fidelity Review

July 23-24, 2026

Day 1

July 23, 2026

	(Reviewer A)	(Reviewer B)
8:30 am-9:00 am	Arrive, get set up, and review agenda with program fidelity review lead	
9:00 am-10:00 am	Observe Team Meeting (Full EASA Team) <i>Names and Roles</i>	
10:00 am-11:00 am	Practice Discussion with Team Lead/ Supervisors <i>Names and Roles</i>	Chart Review <i>(Add name of person assisting reviewer)</i>
11:00 am-11:15 am	<i>Break</i>	
11:15 am-12:15 pm	Practice Discussion with LMP(s) <i>Names and Roles</i>	Practice Discussion with Case Manager(s) <i>Names and Roles</i>
12:15 pm-1:00 pm	<i>Lunch</i>	
1:00 pm-2:00 pm	Practice Discussion with Supported Education and/or Employment Specialist(s) <i>Names and Roles</i>	Practice Discussion with FPE Facilitators <i>Names and Roles</i>
2:00 pm-3:00 pm	Practice Discussion with Executive Leadership <i>Names and Roles</i>	
3:00 pm-3:15 pm	<i>Break</i>	
3:15 pm-4:15 pm	Practice Discussion with entire team: Orientation to Care (15 minutes) Assessment and Treatment Planning (15 minutes) Structured Family Psychoeducation (FPE) (15 minutes) Transition Planning (15 minutes)	
4:15 pm-5:00 pm	Observe Community Education & Outreach Presentation (20 minutes), Review community education strategic plan (15 minutes) and Time for Questions/Initial Feedback from reviewers (10 minutes)	

Agenda Components & Sample Agenda

Day 2 July 24, 2026	(Reviewer A)	(Reviewer B)
9:00 am-10:00 am	Practice Discussion with Nursing staff Names and Roles	Chart Review cont'd.
10:00 am-11:00 am	Practice Discussion with Peer Support or person supporting access to peer support resources Names and Roles	
11:00 am-11:15 am	<i>Break</i>	
11:15 am-12:15 pm	Practice Discussion with Occupational Therapy or person providing sensory and cognitive evaluations, recommendations, and direct services Names and Roles	Chart Review cont'd.
12:15 pm-1:00 pm	<i>Lunch</i>	
1:00 pm-2:00 pm	Practice Discussion with Screener(s) Names and Roles	Practice Discussion with Counselors Names and Roles
2:00 pm-2:30 pm	Follow-up with Team Lead/ Supervisors Names and Roles	
2:00 pm-3:00 pm	Discussion with EASA Participants and Families/supports (List preferred names and roles for all participating, including EASA team members if applicable based on participant preference)	
3:00 pm-4:00 pm	<i>Break & Reviewers scoring</i>	
4:00 pm-5:00 pm	Wrap-up: Overview summary of feedback, Q & A, Team/Agency Feedback and Needs from C4E	

Material Components

Part of the Fidelity Review includes reviewing documentation of your EASA program's work.

Most EASA teams collate a physical binder for each reviewer or share a digital folder with them.

Use the list below to gather the documents that appear in the EASA Fidelity Assessment Tool.

These can be organized any way that makes sense for your team and is easy to find certain documents throughout the review agenda. They do not have to be collated in the order they are in the list.

EASA Program Materials

- Form(s)/Survey(s) used to gather feedback from participants and family members, and results
- QPI plan (if your program has a current plan). Moving forward your program's fidelity review report will serve as your program's QPI plan.
- Your local EASA program brochure and any translated brochures
- All materials used in orientation to EASA for participants, families and supports, including translated materials and access to services regardless of insurance.
- Intake protocol for family/support engagement
- Current Community Education and Outreach (CEO) strategic plan and presentation templates examples for different target audiences
 - Target audiences and places
 - Scheduled presentation dates
 - Team members assigned to presentations
 - Specific message for each targeted site
- All policies and/or forms related to trauma informed care and culturally informed training/policies for agency and for EASA team members
- Intake protocol for family/support engagement
- All Family Psychoeducation (FPE) workshop presentations/materials
- All early psychosis education/psychoeducation materials, including translated materials
- Your local EASA program enrollment policy & workflow
- Treatment planning workflow, including an example treatment plan
- Transition in Care Workflow and EASA Transition Checklist
- Transfer of Care Workflow (for staff turnover)
- Team Meeting template and location of past Team Meeting records
- Most recent IPS Fidelity Report (If following IPS fidelity)
- Agency policy documents specific to EASA (for example texting/email policy, adjusted productivity standards, etc.)
- Agency confidentiality form for reviewers to sign (extra protection beyond the business associate's agreement)

Material Components

- All EASA team hiring, onboarding, and orientation plans and materials, including:
 - List of all current EASA team members and the FTE they are assigned to EASA
EASA team members include:
 - Staff who have already completed or plan to complete the EASA Core Certification trainings
 - Staff who have protected time to attend Team meetings
 - Staff whose caseloads have been adjusted to offer EASA supports and services to EASA participants, family members, and supporters
 - Agency leadership
 - Templates of all EASA job descriptions with designated FTE specifically for EASA
 - Include all clinical and admin supervisors and LMPs
 - Include Supervision notes or evidence that supervision is occurring specific to EASA practices
 - Hiring and Onboarding Policy or Workflow
 - Staff Orientation Tracking Form
 - Professional Development or Training Plan
 - Workforce Wellness Plan and Employee Assistance Program (EAP)

EASA C4E Reviewers will bring:

- Past 2 quarters of REDCAP Participant data for your EASA program
- Past 2 quarters of REDCap Community Education & Outreach data for your EASA program
- Past 2 quarters of team consultation attendance records
- Team training progress records for Core EASA training (Introductory Modules, Family Psychoeducation, Differential Diagnosis, SCID, and SIPS trainings)
- Informed Consent for EASA team members, agency leadership, and participants and family members/supports
- EASA statewide brochures + translated copies
- FFLC Flyers + translated copies
- YALC flyers copies

Chart Review

EASA C4E reviewers need access to all EASA treatment/service planning documents and HIPAA-protected records two weeks prior to the Fidelity Review, through one week after the review.

One EASA team member must be available during the fidelity review visit to assist with the Chart Review in locating documents in the agency electronic health records system. This can be an IT person affiliated with the team if appropriate.

Chart Review

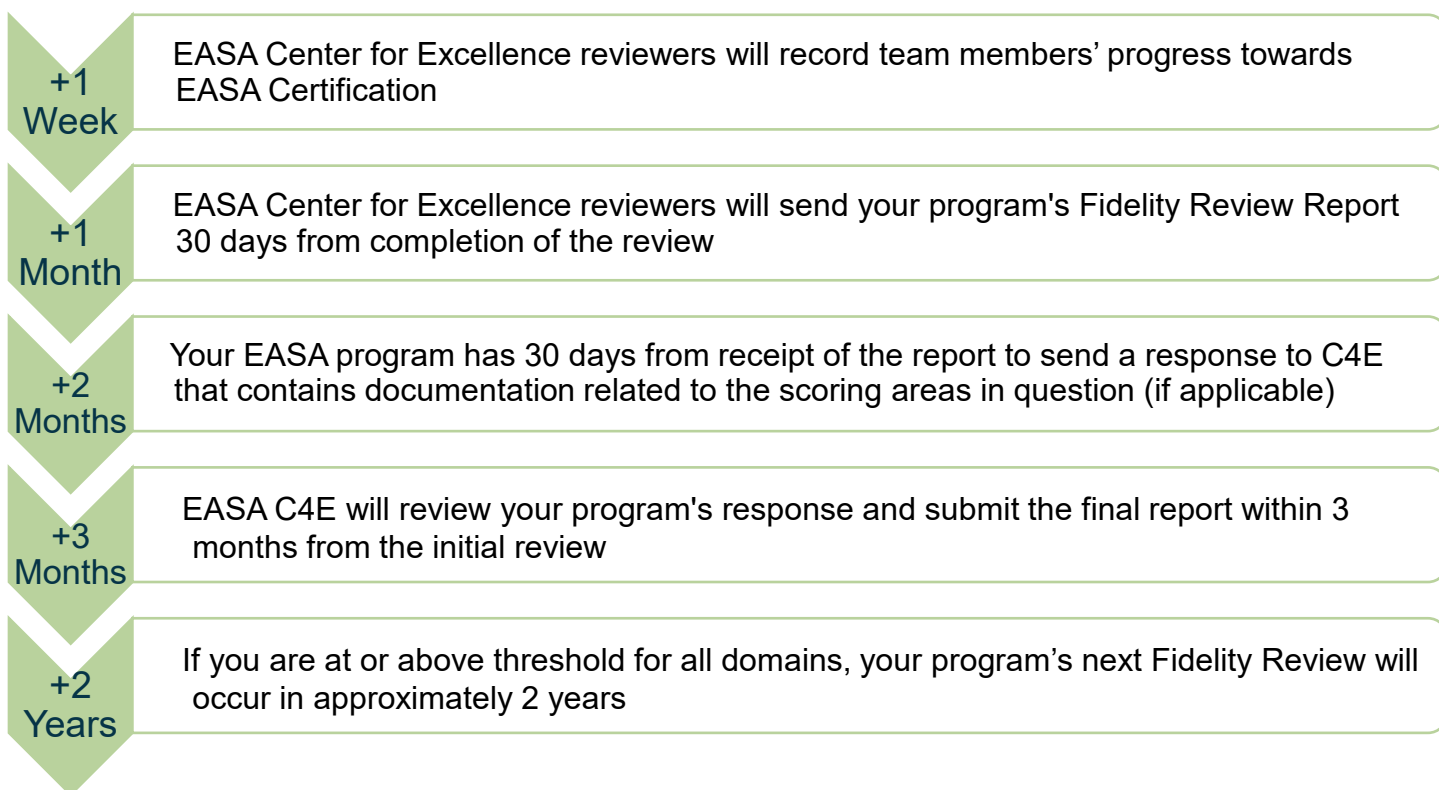
Prepare the following chart contents in paper or electronic form:

- 2-3 closed charts from past 2 years if 0 current participants
- 5 participants if program caseload is 5-20
- 10 participants if program caseload is over 20
- All charts if less than 5 participants
- Include charts of participants early in their treatment, participants who have been in the program for at least a year, participants who will be transitioning soon, range of participants from diverse backgrounds, participants with diverse diagnostic presentations including CHRp, FEP, substance use, IDD, and/or trauma, and participants who have received services from multiple team members (e.g. OT, nursing, SEE).
- Reviewers may request additional charts prior to or during the review.

The selected charts should include:

- Screening, including the Screening decision letter
- Most recent psychiatric assessment and all medical provider notes
- Service plan/treatment plans that include multiple team members and family/support system goals
- 90-day treatment plan reviews
- Mental health assessment for EASA participants, EASA Practice Guidelines assessment requirements cross-checked with agency behavioral/mental health assessment
- Documentation of all labs and metabolic monitoring – any format
- EASA Health Questionnaire / EASA Nursing Initial Health Questionnaire ([Template](#))
- Family Input Questionnaire ([Template](#))
- Occupational Therapy assessment or sensory and cognitive assessments ([Template](#))
- Strengths Assessment or Narrative Strengths Exploration ([Template](#))
- Comprehensive Risk Assessment ([Template](#))
- Crisis Plan ([Template](#))
- EASA Transition Plan if participant will be discharging in the next 4-6 months ([Template](#))

What to Expect Following the Fidelity Review



- ✓ The Report includes your program score based on the EASA Practice Guidelines, areas of success, areas for improvement, and recommendations for what to include in your quality and practice improvement plan (QPI). Moving forward your program's fidelity review report will serve as your program's QPI plan.
- ✓ If there are areas that your program is below threshold C4E will work with your program to create/update your QPI plan and provide additional consultation and training to address these areas