

NSW Mental Health Outcomes & Assessment Training (MH-OAT)

Facilitator's Manual

NSW HEALTH DEPARTMENT

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FOREWORD

The Mental Health Outcome Assessment Training (MH-OAT) is a statewide initiative to improve the quality of mental health care in NSW. It involves strengthening mental health assessment skills, training in standard protocols for assessment documentation, and training in using the standard measures being implemented nationally under the Second National Mental Health Plan. It is a process which aims to support clinicians in their provision of clinical care and to improve mental health outcomes.

The values guiding the development and implementation of the initiative are consistent with those stated in the Charter for Mental Health Care in NSW "to improve the mental health of consumers".

The NSW Institute of Psychiatry and the Centre for Mental Health have collaborated in the development of the training manual. A **clinical staff resource manual** has also been developed and distributed to all clinical staff working within mental health services. This manual contains summaries on assessment and documentation and copies of identified outcome measures such as the HoNOS and instructions on their use.

These resources inform the overall implementation of the Mental Health Outcome and Assessment Training (MH-OAT) within NSW.

One of the longer term aims of MH-OAT is to strengthen the culture of ongoing learning and clinical competence to ensure mental health services are consumer focussed, accountable and developed to achieve the best possible outcomes. The implementation of MH-OAT will enable outcomes to be measured throughout all mental health services within NSW.

The NSW Institute of Psychiatry and the Centre for Mental Health are committed to the production and distribution of high quality, effective educational material in the field of mental health. We hope this manual becomes a valuable resource to assist all clinical staff in the ongoing implementation of Mental Health Outcome Assessment Training.



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Director
Centre for Mental Health



Dr Louise Newman
Director
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ACKNOWLEDGMENTS

Sessions 1-8

Agatha Conrad, Terry Lewin, Rachael Garret and Professor Vaughan Carr from the Hunter Area Health Service were responsible for the modification of the MH-AOT modules and the development of the clinical assessment protocol in conjunction with members of the MH-AOT steering committee.

Sian O'Brien from the Hunter Area Health Service was responsible for developing the case vignette for "Nicole".

Sessions 9-12

The sections of the NSW Mental Health Outcomes and Assessment Training Facilitator's Manual for training clinicians in the use of the Royal College of Psychiatrists (RCP) HONOS and HONOS 65 + is based on work by Allen Morris-Yates, Hugh Barber, Meredith Harris and Siggie Zapart for the Commonwealth Department of Health and Aged Care.

The materials included were assembled from various sources. The introduction and overview of the items is based on the Royal College of Psychiatrists HoNOS training Program (1994, supplied by Anne Beevor of the RCP Research Unit). The vignettes for Bill, Edna and Margo are from the original RCP training program. The vignettes for Simon, Mr Elroy and Mr Jones were developed by Hugh Barber, Siggie Zapart and Allen Morris-Yates.

The detailed training for all the adult vignettes were written by Hugh Barber and Allen Morris-Yates. The guidelines for the administration for self report measures were developed by Allen Morris Yates and Siggie Zapart for the Private Psychiatric Service's Data Collection and Analysis Project.

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INTRODUCTION

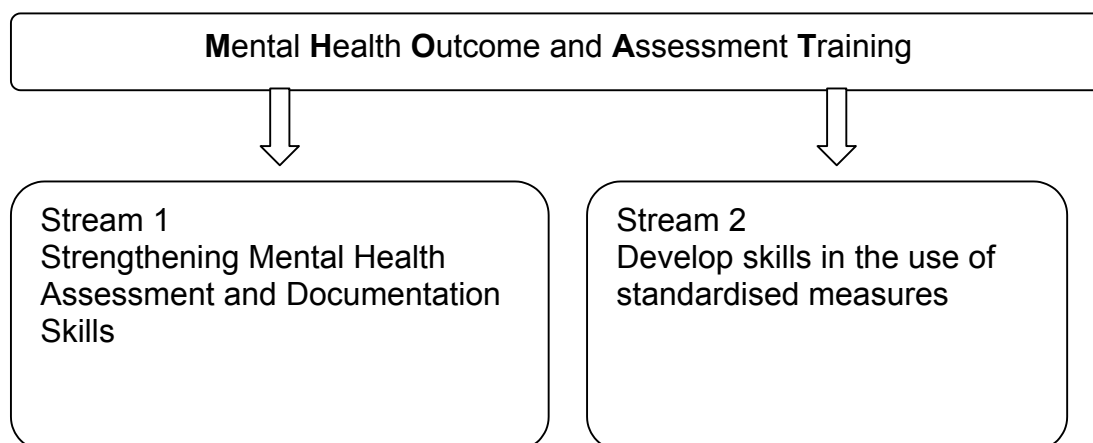
INTRODUCTION

Overview of manual

This manual has been developed to provide educational resources for facilitators to deliver a comprehensive education program in strengthening mental health assessment skills and documentation and the introduction of routine standardised measures for outcomes and casemix measurement in mental health care.

The educational program has been developed to include 8 hours of training in strengthening Mental Health Assessment and Documentation Skills and 4 hours training in standardised measures.

This manual focuses on mental health assessment in adults and older people. The training material in this manual is set out in two broad streams. **Stream 1** aims to Strengthen Mental Health Assessment and Documentation Skills, and **Stream 2** aims to develop skills in the Use of Standardised Measures.



As mental health workers have different levels of skills in mental health assessment and all Area Health Services are using their own assessment modules, **Stream 1 - Mental Health Assessment and Documentation** is flexible. The training resources are designed to cover training requirements for all mental health workers, senior to beginning practitioners and meets the needs of two groups:

- ▶ Area Health Services who are initially using the MH-OAT documentation; and
- ▶ Area Health Services who are continuing to use their own mental health assessment protocol and modules.

Training resources for **Stream 2: Standardised Measures** are fixed. The majority of mental health workers require specific training to support the collection of standardised measures and training should be provided in a standard format.

Four hours of training has been designed to cover the standardised measures data collection protocol, the practice ratings of clinical vignettes and supporting consumer participation through the administration of a self report measure. **This component is fixed and cannot be altered.**

How the manual is set out

Sessions

The manual is set out in 12 sessions that are linked to form the basis for the comprehensive mental health assessment, documentation and standardised measures to be introduced in mental health services throughout NSW:

Session 1 provides a general introduction to the MH-OAT initiative.

Session 2 provides an introduction to the principles underlying mental health assessment, documentation and the use of standardised measures in mental health care.

Sessions 3 to 8 focus on the Clinical Mental Health Assessment Protocol and Modules. Each of these sessions provides two training options and have been written in the same format: Option 1: identifying the overriding principles using a case study and documentation; and Option 2: Detailed training using the MH-OAT forms as the basis.

Sessions 9 to 12 focus on the standardised measures data collection protocol and the standardised measures modules.

The Resource Section contains additional resources for training. The resource section can be used to enhance training and provides elaborations and explanations on the clinical assessment and protocols and standard data collection. It is suggested a copy of the resource section is made available to all clinical staff to assist with the implementation of MH-OAT.

The manual therefore focuses on essential training components (for those more experienced clinicians), and detailed text for facilitators who are not familiar with the material is provided in the second option. For example, training sessions can be developed for the less experienced practitioners by using a clinical vignette to train to every component of the MH-OAT Modules in a step by step fashion. In contrast, for the more experienced practitioner, material can be used to create a session that concentrates on the essential features of conducting and documenting a mental health assessment.

Before commencing training, it is essential that the facilitator is familiar with the Clinical Assessment Protocol and Modules and the Standardised Measures Data Collection Protocols in use in their own Area Health Service.

Layout

The following symbols have been used throughout the training manual to assist in the presentation of visual and audiovisual material.



Overhead explanation (10 point font) – this text accompanies the overhead



Show Overhead – show the corresponding overhead



Case Study – relates to the accompanying case study



Exercise – this involves participants generating responses in small groups or in one group



Instructions (10 point bold font) – Specific instructions for the facilitator



Show Video – the video can be used to elicit information and can also be used to demonstrate how to/ or how not to perform an interview.



Important Training Point

Terminology

The term patient/client has been used predominantly throughout the training material to recognise individuals receiving mental health interventions as significant participants in the reciprocal process of treatment.

Accompanying resources

Overhead transparencies for each session are provided as PowerPoint presentations in zip format on the disc located at the back of the manual in the plastic pocket, and a hardcopy can be found in the back of this manual.

There is a copy of **MH-OAT Clinical Assessment Protocol** and the **Data Collection Protocol for Standardised Measures** in the resource section of the manual. A copy of the modules is located at the back of the resource section. If your local area is not using the standard documentation provided, you will need to provide a copy of your own forms and adapt the training accordingly.

A **training video** of an introduction to MH-OAT by Professor Beverley Raphael and the case study is provided, illustrating the essential components of the standardised clinical assessment. The video provides an introduction to assessment by using the role play of a client interview, providing information and thereby enabling the vignette to be used to teach most of the domains of the assessment.

A clinical staff reference guide, ***“Your guide to MH-OAT”*** has been developed in conjunction with the Facilitator's Manual. This guide contains summaries on the clinical assessment protocol and the standard data protocol rating instructions and glossaries for the standardised measures, guide to offering a consumer measure and codes for use in recording the MDS.

Time allocation

Each session has been allocated a time frame of approximately sixty minutes. These time allocations should only be considered a guide. It is essential to incorporate sufficient breaks within the training, as they are important for maintaining concentration and energy.

Customising the sessions

Session plans have been designed to achieve **specific** learning objectives. However, facilitators may find that participants have different needs and that localisation and modification to the session plan is required. Facilitators will need to identify the skills and experiences of participants and plan and adapt the delivery of education based on the needs of the participants.

To assist in this process the manual has been set out in two training options as a guide:

Option 1: Participants with advanced skills in mental health assessment and documentation.

Option 2: Participants who have less experience in mental health assessment and documentation and/or new mental health workers.

Presentation of sessions

These sessions can be presented as stand alone sessions or can be combined into a workshop format. Facilitators are required to tailor each session to the local environment and ensure the education is adapted to meet the needs of the mental health workers.

Number of participants

As a guide, we recommend five participants as an ideal size for each session. A small number of participants will enable the trainer to ensure that critical information is understood and applied. It will also facilitate the active involvement of all participants and foster an environment for ongoing learning and supervision.

Attendance Lists and Training Reports

In order to meet the requirements as set out in the Area Health Service Business Cases, attendance lists must be generated and forwarded to the MH-OAT Coordinator to compile the Training Report, required by the Centre for Mental Health. An example of an attendance list and the Training Report can be found in the Resource Section of the facilitator manual.

Useful tips for Facilitator's prior to conducting the training

- ▶ **Familiarise yourself** with the session plans, "Your Guide to MH-OAT" the clinician's reference guide, the Clinical Assessment Protocol and Modules and the local Data Collection Protocol for Standardised Measures.
- ▶ **Plan the session using either Option 1 or Option 2 in response to the learning needs of the group**
- ▶ **Prepare your training area** and decide on the training materials you will need for each session. This includes photocopying training materials and handouts that accompany each session.

The text provided should not be read to participants, you should understand the material and use your own words making sure you convey the correct intent.

Remember, in presenting these sessions, standard documentation of mental health assessments does not guide the mental health clinical assessment, but merely provides a structured format for recording an assessment.

Instructions for Facilitator's

Managing change

The implementation of uniform documentation and standardised measures will introduce a number of changes for clinicians in their work practices. It is important for facilitators to have an awareness of the varied responses clinicians may present to change so they can identify them in the training process and acknowledge and respond appropriately.

People will face a number of responses to these changes. These include denial of the change and resistance to it. Then comes exploration of the opportunities that the change can present and finally a commitment to these changes. With the introduction of MH-OAT expect these changes.

With change, participants feel a loss of –

- ▶ Security or control over knowing what the future holds
- ▶ Competence or knowing what to do
- ▶ Sense of direction - their meaning and mission is unclear
- ▶ Territory – psychological as well as physical

Participants may also go through a number of changes as they adapt to the change process. These are –

Denial

“How good things were in the past”

“They don’t really mean it”

“It can’t happen here”

Numbness

Refusing to hear new information

Resistance

Anger, loss and hurt

Stubbornness

Blaming others

Getting sick

Doubting their ability

Exploration

“What is going to happen to me?”

Chaos, indecisive

Clarifying goal and resources

Exploring alternatives and learning new skills

Commitment

Where am I headed

Focus, teamwork, vision and cooperation

Developing your response to change

Build commitment to your work

View change as a challenge and an opportunity

Focus attention on things you can control

To deal with the change that MH-OAT will bring, requires that MH-Oat coordinators, facilitators and resource people to have a number of important skills. These include **Political Skills**., organisations are hotly and intensely political. Change agents dare not join in this game but they had better understand it. **Analytical Skills**, lucid, rational, well-argued analysis can be ignored and even suppressed, but not successfully contested. **People Skills**. People come in all sizes, shapes, colours, intelligence and ability levels, gender, sexual preferences, national origins, first and second languages, religious beliefs, attitudes toward life and work, personalities, and priorities — and these are just a few of the dimensions along which people vary. We have to deal with them all. **Business/System Skills**. Simply put, you’d better understand how your business/system works.

- ⚡ **Supporting MH-OAT at a local level.**
- ⚡ **The first thing to do is jump in. You can't do anything about it from the outside. You support the change by creating the change.**
- ⚡ **Make it clear, MH-OAT is here to stay.**
- ⚡ **Build a team. Identify those people who support the introduction of MH-OAT and work together.**
- ⚡ **Plan and act in short intervals. Do your analysis on the fly but generate feedback**
- ⚡ **Set flexible priorities but remember the limits!**
- ⚡ **Start and maintain an issues logbook of the questions that need answers within your local area**

Adult education principles

This training manual has been developed using **adult education principles** that acknowledge the skills and experience of each adult learner or participant. Learning takes place more readily when training is based on learning theory and experience.

Throughout each section, case vignettes, and clinical illustrations have been used to reinforce the theoretical components of the training. It is important to use these examples throughout the training to increase the learning capacity of the participants.

The manual employs several key strategies to facilitate learning -

- ▶ Problem solving using case vignettes
- ▶ Open discussion to explore, elaborate on and identify complex issues
- ▶ Group activities and discussion

It is important that participants in training recognise each other's clinical and professional skills. Facilitators and participants should be aware that participants have varying levels of skill, knowledge and experience. Facilitators should encourage those with expertise to assist the other participants by sharing their knowledge in a constructive manner to contribute to the learning process.

Refer to the resource section for more information on adult learning.

Training outline

Session 1	Introduction to MH-OAT OVERVIEW
Session 2	Introduction of MH-OAT Protocols MENTAL HEALTH ASSESSMENT AND DOCUMENTATION
Session 3	Strengthening mental health assessment and documentation skills – triage
Session 4	Strengthening mental health assessment and documentation skills – assessment
Session 5	Strengthening mental health assessment and documentation skills – assessment
Session 6	Strengthening mental health assessment and documentation skills – review
Session 7	Strengthening mental health assessment and documentation skills – care plans
Session 8	Strengthening mental health assessment and documentation skills –discharge STANDARDISED MEASURES
Session 9	Data collection protocol for standardised measures
Session 10	Casemix and data collection items HoNOS / HoNOS 65+
Session 11a	Standard measures for Adults and Older People
Session 11b	Standard measures for Children and Adolescents
Session 12	Self report measures – K10