The Document Assessment & Review Tool (DART)

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TA NETWORK

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This webinar is hosted by the University of Washington Wraparound Evaluation and Research Team and the National Wraparound Implementation Center (NWIC), partners in the National TA Network for Children's Behavioral Health, operated by and coordinated through the University of Maryland.

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Agenda for the Webinar

- Brief review of "fidelity" in Wraparound
- The Wraparound Fidelity Assessment System (WFAS)
- Overview of the DART
  - Source materials
  - Structure
  - Sample Items
  - Procedures
- Becoming a DART reviewer
- How to license the DART
- Questions and Answers

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Poll

1. **Who's in the room (role)?**

   Option:
   Write in _____

2. **Do you use WFAS tools currently?**

   Options:
   Yes, and it has been very helpful
   Yes, but we still struggle
   We plan to do so but have not yet
   No

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3. **Do you currently conduct a file review / audit ~~currently~~?**

Options:

No

Yes

If yes, are they generic or wraparound specific?

_____

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Introduction

Before looking closely at the Document Assessment and Review Tool (DART) it is important to understand:

- What it means to assess "fidelity" in Wraparound

- The DART as one of many Wraparound Fidelity Assessment System   (WFAS) tools

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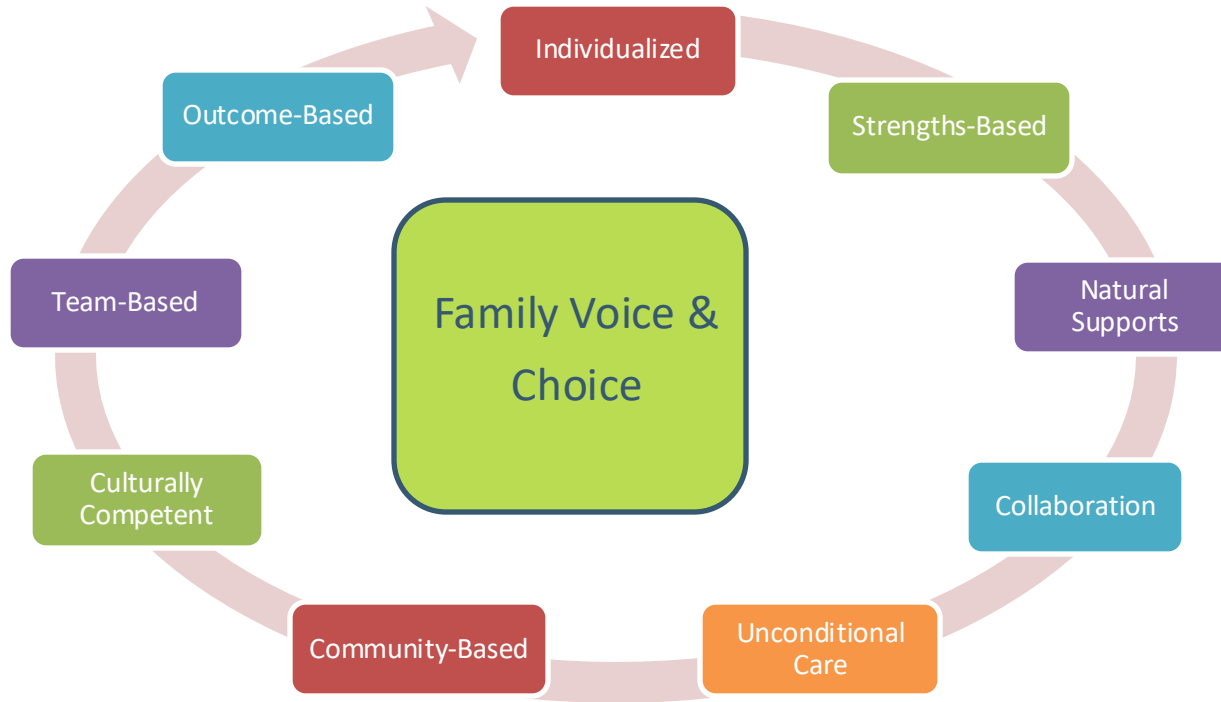
Fidelity Measurement

What is *fidelity?*

– Definition: The extent to which a treatment or intervention is delivered as intended, based on its theory of change

What does it mean for *Wraparound?*

– Adhere to the 10 *principles*

– Effectively implement the four *phases and activities*

– Stay true to the five *essential elements*

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Principles of Wraparound

The Phases of Wraparound

Phase 1A

Engagement and Support

Phase 1B

Team Preparation

Phase 2

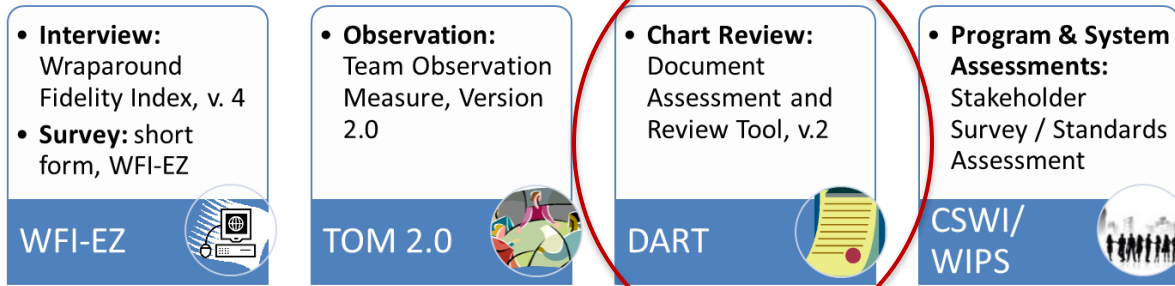Initial Plan Development

Phase 3

Implementation

Phase 4

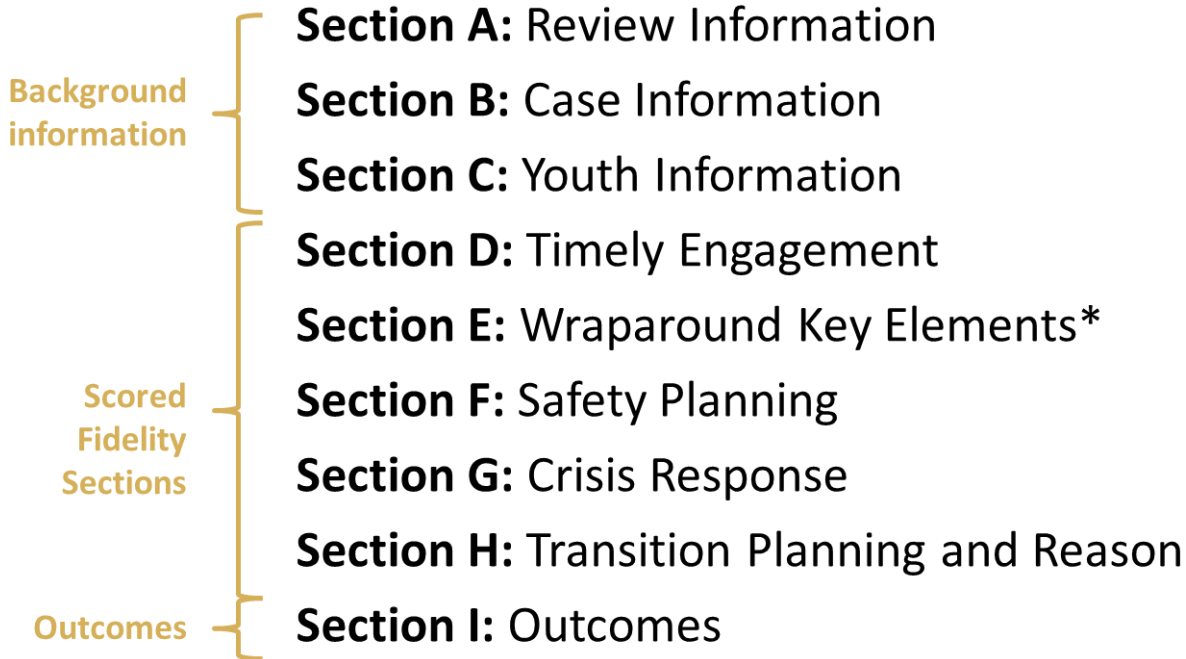Transition

WFAS
Wraparound Fildelity Assessment System

A multi-method approach to assessing the quality and context of individualized care planning and management for children and youth with complex needs and their families

- **Interview:** Wraparound Fidelity Index, v. 4
- **Survey:** short form, WFI-EZ

WFI-EZ

- **Observation:** Team Observation Measure, Version 2.0

TOM 2.0

- **Chart Review:** Document Assessment and Review Tool, v.2

DART

- **Program & System Assessments:** Stakeholder Survey / Standards Assessment

CSWI/ WIPS

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www.wrapinfo.org

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DART

The DART provides a means for coding the presence or absence of indicators of wraparound practice adherence and quality as typically available from documentation:

- Referral paperwork
- Strengths, Needs & Culture discovery/family story
- CFT meeting notes/documentation/attendance
- Standardized assessments
- Progress Notes
- Documentation from Systems Partners
- Crisis/Safety plan
- Transition plans
- Any other paperwork that is unique to your system or providers that would include relevant information

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Sections of the DART

Background information
- **Section A:** Review Information
- **Section B:** Case Information
- **Section C:** Youth Information

Scored Fidelity Sections
- **Section D:** Timely Engagement
- **Section E:** Wraparound Key Elements*
- **Section F:** Safety Planning
- **Section G:** Crisis Response
- **Section H:** Transition Planning and Reason

Outcomes
- **Section I:** Outcomes

Items in this section of the DART are organized by and map to Key Elements of Wraparound practice as supported by training, coaching, and technical assistance provided by the National Wraparound Implementation Center (NWIC). Effective teamwork is not included because these interactions are not readily not assessable via documentation.

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Wraparound Fidelity Assessment System

Wraparound Document Assessment and Review Tool (DART)

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Section A: Review Information

A1. Review Date: _____

A2. Agency/Provider ID: _____

A3. Reviewer ID: _____

A4. Minutes spent reviewing record: _____

Section B: Youth Information

B1. Youth ID: _____

B2. Youth's Age at Enrollment: _____

B3. Youth's Gender: ☐ Male   ☐ Female   ☐ Transgender

B4. Is the youth of Hispanic origin? ☐ Yes   ☐ No

B5. Youth's Race:

☐ American Indian or Alaska Native   ☐ Multi-Racial (please specify):
☐ Asian   _____
☐ African American
☐ Native Hawaiian or Pacific Islander ☐ Other (please specify):
☐ White   _____

B6. At enrollment, which of the following issues was the youth experiencing? (Check all that apply)

☐ Depression   ☐ Bipolar Disorder   ☐ Anxiety
☐ Autism/DD   ☐ ADD/ADHD   ☐ ODD
☐ Substance use/abuse   ☐ Suicidality/Self-harm   ☐ Truancy
☐ Criminal behavior   ☐ Poor school performance
☐ Child Welfare Involvement ☐ Interpersonal conflict with family/peers
☐ Others: _____
_____

Section B: Continued

B7. At enrollment, where was the youth living?

☐ With two (birth, step, or adoptive) parents   ☐ With one parent
☐ With relatives   ☐ In a foster home   ☐ With friends
☐ In residential care   ☐ In detention   ☐ Homeless
☐ Hospitalized for psychiatric reasons
☐ Other: _____

Section C: Basic Information

C1. Phase: ☐ Engagement   ☐ Plan Development   ☐ Implementation
☐ Transition   ☐ Exited/Closed

C2. Care Coordinator ID: _____   **C5. Enrollment Date:** _____

C3. Referral Date: _____   **C6. Exit/Close Date:** _____

C4. Referral Source: _____

C7. Was a Child and Family Team established that includes
at a minimum a facilitator/care coordinator, a caregiver,   ☐ Yes   ☐ No
and the child/youth?

C8. Was at least one Plan of Care developed for this youth?   ☐ Yes   ☐ No

C9. Has the Child and Family Team met at least two times?   ☐ Yes   ☐ No

If your answer to C7, C8, or C9 was "No", you are done
reviewing documentation for this youth. If your answers were
"Yes," to all three questions, please proceed to Section D on
the next page.

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Minimum Criteria for DART Scoring

In order to be eligible for DART scoring, documentation needs to provide clear evidence that the following minimum Wraparound criteria were met for the youth/family:

1. A **team** was established

2. **plan** of care was developed

3. The team has **met ≥ 2 times**

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Complete a DART on youth whose records show clear evidence that:

1. A **child and family team** was established

2. **plan of care** was developed

3. The team has **met ≥ 2 times**

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Attendance Grid

Wraparound Fidelity Assessment System

Wraparound Document Assessment and Review Tool

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Child and Family Team Meeting (CFTM) Attendance Grid* Completing this table is recommended, but optional. Doing so, will make it easier to answer subsequent questions. Use the team meeting sign-in sheets, in addition to the Plans of Care, to determine dates of meetings and who was present at each meeting. After entering meeting date, enter the number of each type of attendee present. Enter "0" if there was no one in that role at the meeting but should have been (see scoring rules). Use N/A for role(s) that are not relevant/appropriate for this particular Child and Family Team and/or Wraparound initiative.

Team Members' Relationship to Youth (please do not use names)	Ex: 3/13/2015														
Dates of Child and Family Team Meetings (write in)*															
Care Coordinator	1														
Caregiver(s)	2														
Youth; age: _____	1														
Parent Peer Support	N/A														
Youth Peer Support	N/A														
Mental Health Provider	1														
Educational Rep	0														
Child Welfare Rep	N/A														
Juvenile Justice Rep	N/A														
Community Support	1														
Natural Support	0														
Other family who lives at home	N/A														
Other:															

* NOTE: IF FEWER THAN TWO CFTMs HAVE OCCURRED AND/OR NO PLAN OF CARE HAS BEEN DEVELOPED, DO NOT COMPLETE THIS TOOL. JUST DO SECTIONS A-C.

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Scored Fidelity Sections

- Fidelity is assessed via **48 items organized by eight subscales**:
  - Timely Engagement (7 items)
  - Key Elements (25 items)
    - Meeting attendance
    - Driven by Strengths and Families
    - Based on Priority Needs
    - Use of Natural and Community Supports
    - Outcome-Based Process
  - Safety Planning (3 items)
  - Crisis Response (3 items)
  - Transition Planning (3 items)
  - Outcomes (7 items)

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Assigning Scores

- Reviewers score whether or not each item of the tool was in evidence in the case file on a scale from 0-2, or Yes/No, – depending on the item in question

  – For some indicators "Not Applicable" or "Missing" are options

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Wraparound Fidelity Assessment System

Wraparound Document Assessment and Review Tool (DART)

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Wraparound DART

W ERT — Wraparound Evaluation & Research Team

Section D: Timely Engagement

Item #	Event	Data Source	Date(s)	Standard	Performance (# of Days)	Met Standard?		
D1 TE	First contact with the family following referral or care coordinator assignment (or to a care coordinator) *(Ideally, the referral date is the day the provider was alerted to the family's need for Wraparound; however, the provider may decide to use the date the family was first assigned to the care coordinator, depending on referral processes; see manual.)*	Referral paperwork or Progress Notes		Within 3 days of: *(circle one)* referral OR care coordinator assignment		Y	N	Miss
D2 TE	First face-to-face contact between care coordinator, youth, and family (if involved)	Progress Notes		Within 10 days of: *(circle one)* referral OR assignment		Y	N	Miss
D3 TE	First Crisis/Risk Management/ Safety Plan completed	Crisis/Safety Plan		At first face-to-face meeting (D2)		Y	N	Miss
D4 TE	First Family Story / Strengths, Needs, and Culture Discovery completed	Strengths, Needs, & Culture Discovery / Family Story		Within 20 days of D2		Y	N	Miss
D5 TE	First Child and Family Team Meeting *(a meeting including caregivers, youth, and at least one formal and one informal support between more than just the Wraparound staff and youth/family)*	Plan of care		Within 30 days of D2		Y	N	Miss
D6* TE	First plan of care completed	Plan of care		Within 35 days of D2		Y	N	Miss
D7* TE	Last *three (or two if fewer than three have been held)* Child and Family Team Meetings	Plan of care		No gap greater than 35 days between the last 2 or 3 CFTMs*	*Largest gap between meetings:*	Y	N	Miss

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Section D: Timely Engagement

Section D: Timely Engagement

Item #	Event	Data Source	Date(s)	Standard	Performance (# of Days)	Met Standard?		
D1 TE	First contact with the family following referral or care coordinator assignment (or to a care coordinator) *(Ideally, the referral date is the day the provider was alerted to the family's need for Wraparound; however, the provider may decide to use the date the family was first assigned to the care coordinator, depending on referral processes; see manual.)*	Referral paperwork or Progress Notes		Within 3 days of: *(circle one)* referral OR care coordinator assignment		Y	N	Miss
D2 TE	First face-to-face contact between care coordinator, youth, and family (if involved)	Progress Notes		Within 10 days of: *(circle one)* referral OR assignment		Y	N	Miss

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Section E: Key Elements

Wraparound Fidelity Assessment System

Wraparound Document Assessment and Review Tool

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Scoring Code (see manual for full scoring rules):　　2 or Y—Fully Met　　　1—Partially Met　　　0 or N—Not Met
　　　　　　　N/A—Not Applicable for family being reviewed　　　Miss—Not able to determine due to missing documentation

Section E: Wraparound Model Key Elements

Item #	Item	Response	Comments
E1 MA DSF	At least one caregiver or close family member attended every Child and Family Team Meeting.	2　1　0　　N/A　Miss	*N/A if the youth is emancipated or the age of majority or older <u>and</u> has chosen not to have a caregiver involved in planning. Miss if no record of meeting attendance.*
E2 MA DSF	The youth attended every Child and Family Team Meeting.	2　1　0　　N/A　Miss	*N/A if the youth is 8 years or younger and/or is not developmentally able to participate. Miss if no record of meeting attendance.*
E3 MA	All key representatives from school, child welfare, and juvenile justice agencies who seem integral to the plan of care attended nearly every Child and Family Team Meeting.	2　1　0　　N/A　Miss	*N/A if no system partners should be involved. Miss if no record of meeting attendance. Please note: school personnel should not be "dinged" for lack of attendance during the summer months.*
E4 MA	All other service providers who seem integral to the plan of care attended nearly every Child and Family Team Meeting.	2　1　0　　N/A　Miss	*N/A if no other service providers are involved with the family. Miss if no record of meeting attendance.*
E5 MA	All peer partners (e.g., family advocates, family support partners, youth support partners, etc.) who are working with the youth and family attended nearly every Child and Family Team Meeting.	2　1　0　　N/A　Miss	*N/A if the family is not working with any peer partners. Miss if no record of meeting attendance.*
E6 MA NCS	At least one natural support (e.g., extended family, friends, and community supports) for the family attended every Child and Family Team Meeting.	2　1　0　　　　Miss	*Miss if no record of meeting attendance.*

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Section E: Key Elements

Section E: Wraparound Model Key Elements

Item #	Item	Response	Comments
E1 MA DSF	At least one caregiver or close family member attended every Child and Family Team Meeting.	2 1 0 N/A Miss	*N/A if the youth is emancipated or the age of majority or older and has chosen not to have a caregiver involved in planning. Miss if no record of meeting attendance.*
E2 MA DSF	The youth attended every Child and Family Team Meeting.	2 1 0 N/A Miss	*N/A if the youth is 8 years or younger and/or is not developmentally able to participate. Miss if no record of meeting attendance.*
			N/A if no custom partners should be involved. Miss if no record of meeting attendance.

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Wraparound Fidelity Assessment System

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Wraparound DART

WERT — Wraparound Evaluation & Research Team

Scoring Code (see manual for full scoring rules):   2 or Y—Fully Met   1—Partially Met   0 or N—Not Met

N/A—Not Applicable for family being reviewed   Miss—Not able to determine due to missing documentation

Section I: Outcomes *(N/A for families enrolled for fewer than six months.)*

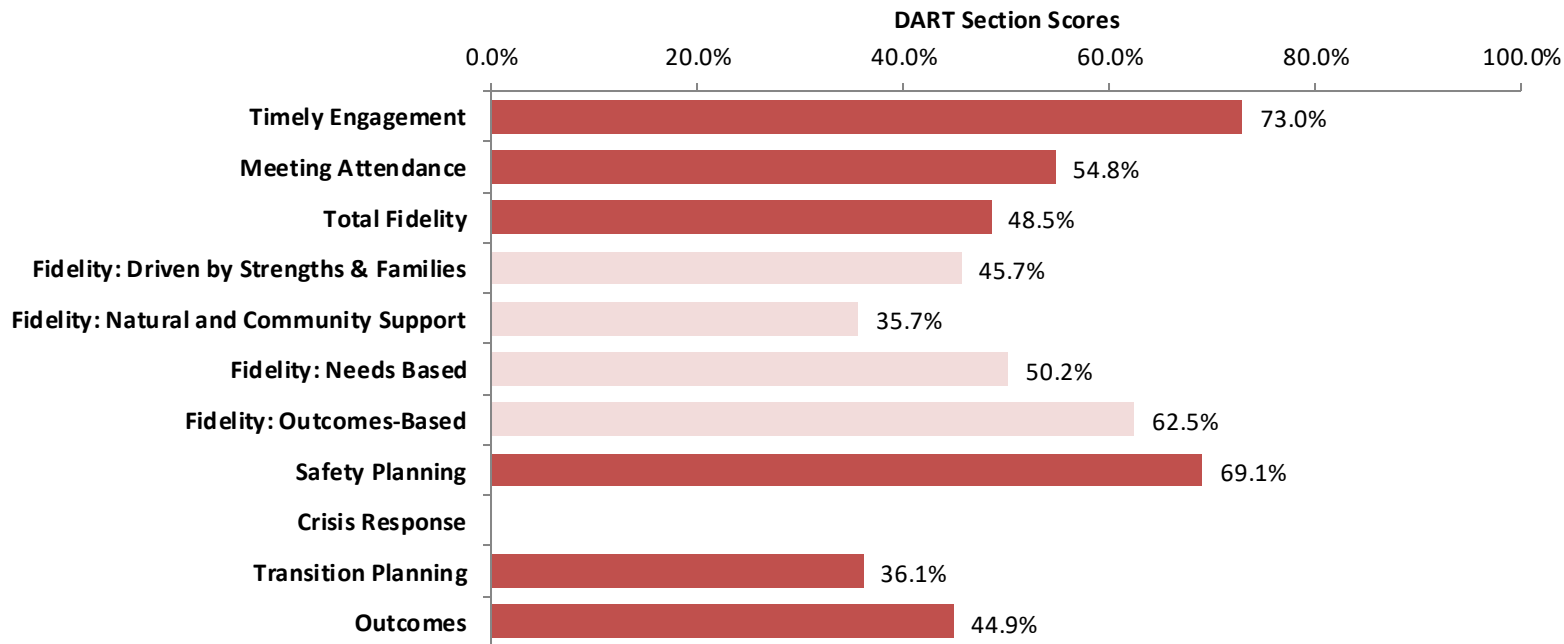| Item #	Item	Score	Comments	Data Sources *(List the tool, data source, etc. that score is based on)*
**Data Source: Progress Notes, plans of care, Documentation from System Partners** *(Preferably, base scores on standardized instruments or data, such as CANS, CAFAS, CBCL, school records, progress consistently measured by the team, etc.)*
I1	In the last six months, the youth's living situation has been stable—S/he has not been removed from the home or changed placements. If there was a move, it was to a less restrictive setting.	Y N Miss		
I2	In the last six months, the youth has NOT visited the ER and/or been hospitalized for emotional or behavioral difficulties.	Y N Miss		
I3	In the last six months, the youth has experienced reduced mental health symptoms.	2 1 0 Miss		
I4	In the last six months, the youth has experienced improved interpersonal functioning.	2 1 0 N/A Miss	*N/A if interpersonal functioning was not an issue for the youth.*	
I5	In the last six months, the youth has regularly (85%+) attended school and/or has been employed.	Y N N/A Miss	*N/A if the youth is too young to be enrolled in school.*	
I6	In the last six months, the youth has experienced improved school or vocational functioning.	2 1 0 N/A Miss	*N/A if school functioning was not an issue for the youth, or the youth is too young to be enrolled in school.*	
I7	In the last six months, the youth has NOT been arrested or violated probation/parole.	Y N N/A Miss	*N/A if criminal behavior was not an issue for the youth.*	

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Section I: Outcomes

Section I: Outcomes *(N/A for families enrolled for fewer than six months.)*

Item #	Item	Score			Comments	Data Sources *(List the tool, data source, etc. that score is based on)*
	Data Source: Progress Notes, plans of care, Documentation from System Partners *(Preferably, base scores on standardized instruments or data, such as CANS, CAFAS, CBCL, school records, progress consistently measured by the team, etc.)*					
I1	In the last six months, the youth's living situation has been stable—S/he has not been removed from the home or changed placements. If there was a move, it was to a less restrictive setting.	Y	N	Miss		
I2	In the last six months, the youth has NOT visited the ER and/or been hospitalized for emotional or behavioral difficulties.	Y	N	Miss		

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Example feedback from DART Report: Overall

DART Section Scores

Category	Score
Timely Engagement	73.0%
Meeting Attendance	54.8%
Total Fidelity	48.5%
Fidelity: Driven by Strengths & Families	45.7%
Fidelity: Natural and Community Support	35.7%
Fidelity: Needs Based	50.2%
Fidelity: Outcomes-Based	62.5%
Safety Planning	69.1%
Crisis Response	
Transition Planning	36.1%
Outcomes	44.9%

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Sample DART Report: Key Elements

Section E: Wraparound Model Key Elements

Data Source: Strengths, Needs, and Culture Discovery (or other initial assessment documentation)					
Item #	Item	Average Score (out of 2)	%N/A	%Miss	Comments
E1 DSF	At least one caregiver or close family member attended every Child and Family Team Meeting.	1.65	0	0	
E2 DSF	The youth attended every Child and Family Team Meeting.	1.43	11.8%	5.9%	N/A if there are no family members on the team.
E3 DSF	All key representatives from school, child welfare, and juvenile justice agencies who seem integral to the Plan of Care attended nearly every Child and Family Team Meeting.	1.20	41.2%	0%	N/A if the team only consists of the facilitator, youth, and (possibly) family members.
E4 DSF	All other service providers who seem integral to the Plan of Care attended nearly every Child and Family Team Meeting.	1.00	23.5%		Miss if no strengths inventory present.
E5 DSF	All peer partners (e.g., family advocates, family support partners, youth support partners, etc.) who are working with the youth and family attended nearly every Child and Family Team Meeting.	0.91	35%		
E6 NCS	At least one natural support (e.g., extended family, friends, and community supports) for the family attended every Child and Family Team Meeting.	0.40		11.8%	

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Sample DART Report: Outcomes

Section I: Outcomes *(N/A for families enrolled for fewer than 90 days.)*

	Data Source: Progress Notes, Plans of Care, Standardized Assessments, Documentation from System Partners					
Item #	**Item**	**% Yes**	**%No**	**%N/A**	**%Miss**	**Comments**
I1	Since entering Wraparound, the youth's living situation has been stable—S/he has not been removed from the home or changed placements. If there was a move, it was to a less restrictive setting.	41.2%	23.5%		35.3%	
I2	Since entering Wraparound, the youth has NOT visited the ER and/or been hospitalized for emotional or behavioral difficulties.	41.2%	23.5%		5.9%	
I5	Since entering Wraparound, the youth has regularly (85%+) attended school and/or has been employed.	35%		17.6%	47.1%	*N/A if the youth is too young to be enrolled in school.*
I7	Since entering Wraparound, the youth has NOT been arrested and/or violated probation.	52.9%	5.9%	11.8%	29.4%	*N/A if criminal behavior was not an issue for the youth at entry.*
Item #	**Item**	**Average Score (out of 2)**	**%N/A**		**%Miss**	**Comments**
I3	Since entering Wraparound, the youth has experienced reduced mental health symptoms.	0.91			35.3%	
I4	Since entering Wraparound, the youth has experienced improved interpersonal functioning.	1.01			35.3%	*N/A if interpersonal functioning was not an issue for the youth at entry.*
I6	Since entering Wraparound, the youth has experienced improved school or vocational functioning.	1.25	11.8%		41.2%	*N/A if school functioning was not an issue for the youth at entry.*

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Qualifications for Use

IDEALLY, Reviewers should:

- Not be directly involved with the families whose records are being reviewed

- Not personally know, or at least supervise, the care coordinators whose records are being reviewed

- Have adequate knowledge of the local service delivery system, the Wraparound process, and the DART User Manual

- Have sufficient practice administering the DART

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Current Training Protocol

1. Overview of the **Wraparound process**
   - including its principles, key elements, and four phases and activities

2. Overview of the **DART**
   - purpose and structure of the DART,
   - general DART administration procedures contained in the manual
   - individual DART items and scoring rules contained in the manual

3. **Practice on a local case**
   - Group practice document review of real (local) charts with an experienced reviewer, either from WERT or a local expert

4. **Double scoring and reviewing cases**
   - until reviewers are scoring cases similarly.

5. Periodic group and/or **supervisor** review
   - of randomly selected cases

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Future Training Protocol

- Steps 1-5 of current procedure
- Complete first **online sample DART** case
  - Must achieve 80% inter-rater reliability to pass.
  - Able to compare answers to "gold standard" ratings (with justification included)
- Complete second **online sample DART** case if failed to meet 80% inter-rater reliability with first.
- Group practice document review of real (local) charts with an experienced reviewer, either from WERT or a local expert
- A handful of interrater comparisons before starting independent reviews
- Periodic group and/or individual supervision for reviewers

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Future Training Protocol – PROPOSED ALTERNATIVE

Will add a step between 2 & 3.

Future reviewers will be asked to score one, or two, gold standard sample cases, as needed.

- Must achieve 80% inter-rater reliability to pass and go on to the next step

- Able to compare answers to "gold standard" ratings (with justification included)

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- **During Training:** It may take several hours or even days to complete the initial few DARTs. As reviewers become more familiar with the tool, the manual, and the organization of the paperwork, it will take less time.

- **After Training:** It typically takes 60 minutes to review one youth record, when done in a focused and efficient manner.

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Sampling Guidelines

- Necessary to administer the DART with a sample of records that is **representative** of the initiative or project overall

- A **stratified random sample** of 20-30% of the families each care coordinator is working with is recommended
  - Ex: If each care coordinator has a caseload of 10 families, 2-3 records per care coordinator should be randomly chosen for review
  - The new WrapStat data management system, coming in Sept 2020 with a DART license, will help projects/initiatives easily identify whose records to sample.

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Interrater Reliability

For each round of DARTs we recommend that you **double score** (two different reviewers) a certain percent of them. That percent changes depending on how many cases you plan to score using the DART:

Number of Cases Scoring	Recommended Percent of Cases to double score
>30	20%
10-30	30%
<10	50%

Double scoring will help ensure that interrater reliability is maintained. **"Drift"** (slow movement away scoring consistently) can occur over time. A slip in interrater reliability can be a sign that a training refresher is necessary for DART reviewers.

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Inter-Rater Reliability (Initial test)

Intra-Class Correlations for Full DART and DART Subscales

Ns	Rater Pair	Full DART	Timely Engagement	Key Elements	Safety Planning	Crisis Response	Transition Planning	Outcomes
N = 5	R1 – R2	0.703	0.822	0.52	-0.216	N/A	1	0.717
N = 6	R1 – R3	0.72	0.875	0.522	0.776	0.889	0.839	0.889
N = 4	R1 – R4	0.813	0.839	0.808	N/A	0.75	1	0.56
N = 5	R2 – R4	0.706	0.58	0.671	0.664	N/A	0.857	0.605
MEAN ICC		**0.74**	**0.78**	**0.63**	**0.41**	**0.82**	**0.92**	**0.70**

Interested in Licensing the DART?

Simply:

1. **Go to:**
   https://els.comotion.uw.edu/express_license_technologies/document-assessment-and-review-tool-dart
   The University of Washington's Co-Motion Express Licensing site, Document Assessment and Review Tool (DART)

2. **Click "License"** (the blue button)

3. **Complete the blank fields** in the agreement and exhibits

4. **Print & Sign** the agreement.

5. **Mail, fax, or email** the signed agreement to Co-Motion

6. **Receive Invoice** from Co-Motion

7. **Mail in license fee**

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Cost of licensing the DART

- Licensing fees for the DART will change effective 9/1/20 - due to launch of the new data management system – **WrapStat.**

- Until then the licensing prices will be based on those in the table below - prorated on a monthly basis from the agreement's effective date through 8/31/20

Startup Fee	Base Annual License Fee	Sub-Site Fee (For 2 or more sites)	Total Annual Fee
$1,500 *(one time only)*	$1,100 for one site	0 sub-sites: $0	$1,100
	$1,100 for one site	1-5 sub-sites: $550 each	$1,650 - $3,850
	$1,100 for one site	6-10 sub-sites: $500 each	$4,100 - $6,100
	$1,100 for one site	11-20 sub-sites: $450 each	$6,050 - $10,100
	$1,100 for one site	21-40 sub-sites: $400 each	$9,500 - $17,100
	$1,100 for one site	41+ sub-sites: $350 each	$15,450 - $-----

- Licensees will be offered a new agreement effective 9/1/20 which will include WrapStat and be based on the new pricing structure, still in development.

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Questions about DART licensing?

Contact Co-Motion at:

Phone: 206-543-3970

Email: license@uw.edu

Contact WERT at:

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SAMHSA
Substance Abuse and Mental Health
Services Administration

4. **Does the DART look like something you might be interested in for your organization/initiative?**

Options:

Yes

Maybe, but I'd like to learn more first

No

SAMHSA
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Services Administration

Questions and Answers

UW WERT: www.wrapinfo.org
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SAMHSA's mission is to reduce the impact of substance abuse and mental illness on America's communities.

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