Michigan Association for
Infant Mental Health
Learning and growing together.

<u>EASy Application Reviewer Instructions</u>

The role of the Reviewer is to determine if an Endorsement® Applicant has met all the requirements and competency areas for the Endorsement® for which the Applicant is applying. Determining whether or not a knowledge/skill area or a requirement has been met is not always straight forward. You will rely on your own experience as an endorsed professional and can consult with the Administrator for guidance and clarification along the way. Keep in mind that **at least two** Reviewers will need to agree that the requirements and competencies have been met (or not). You will not have to make the decision alone.

To begin
- Log in using the username and password sent to you by EASy. If you are already an EASy user, your username and password will be the same. There is only one login for EASy
- Upon your very first log in, you will be asked to electronically "sign" a Confidentiality Statement
- To change your password, go to Edit Profile button in upper right corner
- Within Edit Profile, you can also set your alerts. It is strongly recommended that the Reviewer elect to receive In-Application and Email alerts[1] for all categories. Click save after any alert choices you make
- You'll see a list of Applicants that have been assigned to you within the Assigned Apps section. Click on the arrow just to the left of the Applicant name to open his/her application and to begin a review
- The Preliminary tab is typically not needed for Reviewers
- Within the Details tab the Applicant may have attached a resume or CV
    - When reviewing Infant Mental Health Mentor (IMHM) Applications, there may be a reference to a resume or CV. It can be helpful to review the resume for added clarity about the Applicant's work and leadership experiences
- You can begin at the Agreement and Ethics tabs. Neither requires any action on your part; just confirm Applicant has agreed to each
- As long as you save as you go, you can log out and then back in as many times as necessary to complete a review
- If the system does not sense activity for 5-minutes, you will receive a warning that your session will close soon. Save your work often!
- Definitions of what is required are listed at the top of each section and within the body of the required sections for the Applicant

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[1] In-Application alerts show up on the Reviewer's dashboard and therefore require being logged in and checked frequently. Email alerts will be sent to the e-mail address linked to your EASy account. Email alerts will ensure that the Reviewer will not miss communication about the Endorsement® Application.

- It is important to note whether you are assigned as the first or second Reviewer
  - As the first Reviewer, it is important for you to list any questions or concerns that you may have about the application you are reviewing so that the second Reviewer can pay special attention to those areas during the review. We encourage you to do this within the Summary tab where it says, Comments (private)
  - As the second Reviewer, you will want to go to the Summary tab FIRST, before reviewing the application, to read the first Reviewer's comments. This way, you will know where to focus your attention while reviewing the application

Comments (public & private)
- You may notice comments/questions/responses to questions that have been posted by the Applicant, Advisor, and/or Administrator in the Comments (public) section under the Education, Work, Training, Supervision, References, and Leadership (IMHM only) tabs
- The history of the correspondence may be helpful to you as you are reviewing entries in each of these tabs
- If you have a remark to add in any section as you go along, PLEASE USE THE Comments (private); it is important that the Applicant not know the identity of the application Reviewer. If you select (public) and reveal your identity to the applicant, email the Administrator immediately
- If you have a question for the Administrator, please select Support in the top right hand corner of the screen.
  - Review the Knowledge Base to see if you can find your answer. If you cannot, go to My Support Tickets. Select, Create Support Ticket and select Endorsement Issue when prompted to enter Ticket Type
  - As a last resort, email us at miaimh.easy.imhe@gmail.com

Review Advice
To best assist in your review, the Application tabs are listed in the order that we recommend you go through them to complete your review. The reasoning behind this is outlined here:
- An Applicant must demonstrate fulfillment of the competencies found within the *Theoretical Foundations* and *Direct Service Skills* domains via his/her Education and Training experiences
- Because of this, start your review within the Training tab so that you can become aware of gaps in any of the key competency areas that make up the critical domains of *Theoretical Foundations* and *Direct Service Skills* (more specifics are outlined in "Training" below!)
- From there, go directly to the Education tab so that you can determine whether any of the competency gaps that you noted from Training are addressed within Education (more specifics outlined in "Education" below)

- If you still have questions about a specific competency area(s) after reviewing Training and Education, go to the References tab and review how the Applicant was rated in the corresponding competency area(s) by his/her references
- Upon viewing those tabs and considering the *Theoretical Foundations* and *Direct Service Skills* domains, make a comment (private) within the Summary tab, which identifies your comments, questions, and/or concerns about potential gaps. Please provide a thorough explanation
- Proceed with the rest of your review

Training
- For each session listed, consider the trainer, the sponsor, and the number of hours. If it seems relevant to at least one of the knowledge/skill areas of the competencies, you can change the status to "Approved." Change the status of a training entry from "Pending" to "Deferred" if it was apparent that the topic was not related to any IMH competencies
- Conferences, meaning a day or more of keynote speeches and workshops of 90-120 minutes each, provide opportunities to gain knowledge and skill over a range of topics. Applications should include a balance of broader experiences, with those that have more in depth content, like intensive trainings that spend 6 or more hours on one topic. For conferences, each workshop and relevant competencies should either be listed separately or the Applicant should use the notes section to list out the workshops attended at one conference
- If the Applicant does not have much more than 30-hours and the majority of those come from brief sessions of 1-2 hours, this could be a reason to defer. Although 30-hours of training is the minimum amount required, MOST Applicants find that they need to enter many more hours of training depending on their educational experiences. On average:
  - Infant Family Associate (IFA) Applicants enter 40 hours of training
  - Infant Family Specialist (IFS) Applicants enter 50 hours of training
  - Infant Mental Health Specialist (IMHS) Applicants enter 75 hours of training
  - Infant Mental Health Mentor (IMHM) Applicants enter 90 hours of training
- Review the knowledge/skill areas that the Applicant indicated were met. You are free to agree, add some, or overrule the Applicant entirely with your own selections by checking the knowledge or skill areas that seem most relevant based on your knowledge of the training
- In general, we take the word of the Applicant as to what s/he got out of each training, but there will be times that it is appropriate for Reviewer to "overrule"
  - Refer to document "MI-AIMH Endorsement® Crosswalk for Trainings and Competencies" for common trainings and competency areas covered
- Rule of thumb is one knowledge/skill area for each hour of training
- Consider how many training hours the Applicant acquired specific to the competencies found within the *Theoretical Foundations* and *Direct Service Skills* domains? We recommend that you make a note about this using Comments (private) so that you can refer back to this over the course of your review in

addition to providing information for subsequent Reviewers and the EASy Administrator
- Pregnancy and Early Parenthood
- Infant/Very Young Child Development and Behavior
- Infant/Very Young Child Family Centered Practice
- Relationship Based/Focused Therapeutic Practice
- Family Relationships & Dynamics
- Attachment, Separation, Trauma, Grief and Loss
- Cultural Competence
- Screening and Assessment
- Observation and Listening
- IFS, IMHS & IMHM: Disorders of Infancy/Very Young Children
- IMHS & IMHM: Parent-Infant-Young Child Relationship Therapeutic Practice
- IMHM-C: Reflective Supervision

- DC: 0-3R or DC: 0 - 5 training covers a large portion of the disorders of infancy and early childhood competency (IFS, IMHS, IMHM only); if an Applicant has not attended this training, it is important that the Applicant has attended other trainings that cover this competency area in great detail (for example: trainings on atypical development, fetal alcohol spectrum disorder, autism spectrum disorder, sensory integration disorders, etc.) and/or that the Applicant has coursework listed within his/her Education that covers this competency
  - *Please note: The Michigan Department of Health and Human Services-Mental Health Services to Children and Families encourages CMHSP clinical staff to participate in DC: 0-3R and DC: 0 - 5 training opportunities*
- In order to demonstrate that competency has been met for screening & assessment, Applicants need to attend trainings that are specific to tools for 0 – 36 month olds, including, but not limited to: DECA I/T, DECA-C, ASQ 3, ASQ SE 2, MCHAT-R, PEDS, PEDS DM, Denver Developmental Screening Test II, IDA, NCAST, etc.
  - *Please note: The Michigan Department of Health and Human Services-Mental Health Services to Children and Families requires CMHSP clinical staff be trained in the DECA (Infant, Toddler and Clinical versions) either at in person trainings or via webinar*
- Often times, intensive trainings that spend 5-6 hours going in depth on a screening and assessment tool are necessary to document competency in this area. Additionally, Applicants (IFS, IMHS, & IMHM only) typically attend more than one screening and assessment tool training to fully demonstrate that competency has been met in this area **OR** they have coursework listed within their Education that covers this competency
- In order to demonstrate that competency has been met for Observation & Listening, Applicants (IFS, IMHS, & IMHM only)) are encouraged to attend training on an observation tool, such as the Massie Campbell or PICCOLO
  - *Please note: The Michigan Department of Health and Human Services-Mental Health Services to Children and Families encourages CMHSP clinical staff to participate in Massie Campbell ADS and PICCOLO training*

- Applicants for IMHM-Clinical must include a minimum of 15 hours of didactic training about the provision of RSC
  - If there is no indication that this training requirement was met, use the Comments (private) section to alert the Administrator and specify the concern
  - The Administrator will communicate with the Applicant about this and ask the Applicant to log back into EASy and update the identified section
  - The Administrator will communicate with the Reviewer when the update has been completed or if the Applicant does not meet the requirement
- Click "Save Competencies" at the bottom before closing each window
- Repeat for each training session listed
- Click Save at the bottom of the page before moving to the next tab.

Education[2]
- Check that the Applicant has been out of school long enough to meet the "post-degree" paid work criteria (e.g., if applying for Infant Family Specialist, did they earn at least a Bachelor's degree at least two years ago? If so, change status to "Approved")
- There should be official transcripts received for each institution listed
- Some Applicants may have a CDA certificate or a graduate certificate in IMH uploaded in this section either in place or in addition to transcripts. If an Applicant's academic program has been cross-walked to the competencies, the crosswalk may also be uploaded to this page
- Right click on each "View" icon to open the transcripts in a separate window
- Most Reviewers find it easiest to print a hard copy and highlight the names, course numbers, and grades for any courses that are relevant to the competencies
- Check to make sure the degree was received in the same year as listed on Application. If so, click on "Edit Competencies" and change status to "Approved"
- As first Reviewer, you will select competencies based on course title and grade. Second Reviewer will select competencies within the second column if s/he agrees with your list. Second Reviewer may add additional academic competencies
- Important questions to consider: Was the course during graduate or undergraduate studies? How long ago was the course completed? What grade did the Applicant earn?
- How many course experiences does the Applicant have that address competencies found within the *Theoretical Foundations* and *Direct Service Skills* domains? We recommend that you make a note about this using Comments (private) so that you can refer back to this over the course of your review in addition to providing information for the subsequent Reviewers and the EASy Administrator
  - Pregnancy and Early Parenthood
  - Infant/Very Young Child Development and Behavior
  - Infant/Very Young Child Family Centered Practice

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[2] For Applications created after 10/1/2016, education and transcripts are combined. For Applications created BEFORE 10/1/2016, transcripts will have it's own tab, however, the process for reviewing transcripts is the same as is outlined within this document

- o <mark>Relationship Based/Focused Therapeutic Practice</mark>
- o <mark>Family Relationships & Dynamics</mark>
- o <mark>Attachment, Separation, Trauma, Grief and Loss</mark>
- o <mark>Cultural Competence</mark>
- o <mark>Screening and Assessment</mark>
- o <mark>Observation and Listening</mark>
- o <mark>IFS, IMHS & IMHM: Disorders of Infancy/Very Young Children</mark>
- o <mark>IMHS & IMHM: Parent-Infant-Young Child Relationship Therapeutic Practice</mark>
- o <mark>IMHM-C: Reflective Supervision</mark>
- Use Edit Competencies to check off which knowledge and skill areas were covered by college/university courses
  - o For example, if an Applicant took a course entitled, "Early Childhood Development," you'd want to: FIRST, check that s/he received a passing grade; SECOND, select, "Infant/Young Child Development" within "Edit Competencies"

    Additional examples:
    - *An English course = Writing*
    - *A Speech course = Speaking*
    - *A Philosophy course = Analyzing Information*
    - *A Marriage & Family course = Family Relationships & Dynamics*
    - *If an Applicant has earned his/her MSW, s/he can receive competency in Ethics, Safety & Advocacy*
- Click "Save" at the bottom of the page before moving to the next tab
- Shred any hard copies of transcripts

<mark>*UPON COMPLETION OF REVIEW OF THE TRAINING AND EDUCATION TABS, MAKE A COMMENT (**PRIVATE**) WITHIN THE SUMMARY TAB THAT SUMMARIZES YOUR IMPRESSION OF THE APPLICANT'S COMPETENCE IN THE DOMAINS OF THEORETICAL FOUNDATIONS AND DIRECT SERVICE SKILLS. IF NEEDED, YOU CAN INCLUDE YOUR REVIEW OF THE REFERENCES IN THIS SUMMARY AS WELL.*</mark>

References
- <mark>If you still have questions about a specific competency area(s) from the *Theoretical Foundations* or *Direct Service Skills* domains after reviewing Training and Education, go to the References tab and review how the Applicant was rated in the corresponding competency area(s) by his/her references; make a Comment (private) if applicable</mark>
- You will see "Waiver" with either a yellow or green box underneath it.
  - o These boxes explain "*No. Applicant has not waived right to access this form,*" or "*Yes. Applicant has waived right to access this form,*" or "*Applicant has not declared whether or not they have waived the right to access this form.*"
  - o The waiver tells the rater whether or not the Applicant is waiving his/her right to know what the rater says about him/her. Some raters are not comfortable completing the form unless they know what they submit will be

confidential, so it's an "informed consent" issue for the rater. This does not affect you as the application Reviewer

- To view the rating form, right click on the View icon for each reference to open the rating is a separate window
- Review all 3 to be sure there is a rating from the Applicant's
    - a) reflective supervisor/consultant,
    - b) program supervisor (person to whom Applicant currently reports),
    - c) supervisee, if the Applicant provides RSC to others, and/or
    - d) colleague, teacher, trainer, or other who is familiar with the Applicant's work as it relates to the competencies
- In most instances, at least one rater is endorsed at IFS, IMHS, or IMHM
- If the Endorsement® Application is for an IFA Applicant, there may be a rating from an individual who is not endorsed, but who has been vetted and approved by the IMH association as knowledgeable about the competencies. There should be a comment from the Administrator regarding the vetting of a reference. Additionally, there is a place where the Administrator may have uploaded a resume/CV for a vetted reference
- If the Rater is the provider of RSC, check to see that the dates and hours match what was reported by Applicant in the Supervision tab
- In the "Edit Competencies" window, change status to "Accepted" if applicable
- Competencies are auto-filled by EASy for each item rated at "Average", "Above Average", or "Exceptional" (3, 4, or 5)
- There is **not** a reference rating question for every single competency area; if a competency is not checked off within the reference rating form it may be because of this OR it could be that the reference rater responded, "I do not have enough information to rate/comment"
- Use Comments (private) to alert the Administrator of scores of "1 – Minimal Ability" or "2 – Below Average Ability" or if there are more than 6 responses of "0 – I do not have enough information to rate/comment"
- Use Comments (private) to alert the Administrator of "I do not recommend for Endorsement®"
- Repeat for each reference rating
- Click "Save" at the bottom of the page before moving to the next tab

Work
- Do the dates listed meet the minimum requirement of time worked within the role required for this Endorsement®?
    - Example: For Infant Family Specialist, the description needs to clearly state that the Applicant has worked with 10+ families in addition to describing relationship-based work with 0-36 month olds and their primary caregivers (biological parent(s), foster parent(s), guardian(s), etc.)
    - Example: For Infant Mental Health Specialist, the description needs to clearly describe the use of infant-parent relationship based therapies and practices like Infant Parent Psychotherapy are being used in work with 0 – 36 month

olds and their primary caregivers (biological parent(s), foster parent(s), guardian(s), etc.)

- Carefully read the description of each job. Does the narrative clearly meet the specialized work experience criteria? If yes, click on "Edit Competencies." Change the status at the top from "Pending" to "Approved"
  - If the narrative does not meet the specialize work criteria, use the Comments (private) section to alert the Administrator and specify the questions you have about the Applicant's work experience
  - The Administrator will communicate with the Applicant about this and ask the Applicant to log back into EASy and update the identified section
  - The Administrator will communicate with the Reviewer when the update has been completed or if the Applicant does not meet the requirement
  - If a listed work experience does NOT meet the requirements but does fulfill demonstration of some of the competencies, you can change the status from "Pending" to "Deferred" and the competencies will still appear within the summary page of the application
- Applicants for IMHM-Clinical will also list people/groups for whom they have provided reflective supervision/consultation (RSC). These listings should be cross-checked with entries under Supervision to be sure the Applicant has a minimum 3 years paid experience as a provider of RSC
- Next, check off the knowledge and/or skill areas that were addressed in this Work role. Keep in mind that those demonstrated through Work experience carry less weight than Education, Training, and References, so it's not critical that the Applicant cover everything
- Click Save at the bottom of the Edit Competencies window and repeat for each position listed. Note: Applicants may list every position ever held. If it's not relevant to the requirements and/or competencies, change status to "Deferred"
- Click Save at the bottom of the page before moving to the next tab

Leadership (IMHM only)
- If leadership activities are listed within this tab, carefully read the description of each. If the activity is an example of IMH specific leadership, change status for each leadership activity from "Pending" to "Approved." If not, change status to "Deferred"
- If the Applicant refers to his/her resume or CV, go to the Details tab to download it for your review (similar to transcripts). Make a note in Comments (private) of any leadership activities found from CV/resume (this will assist the second Reviewer and Administrator when viewing the Application)
- As first Reviewer, you will select competencies based on leadership experiences listed. Second Reviewer will select the competencies within the second column if s/he agrees with your list. Second Reviewer may add additional competencies
- When determining if the leadership **requirement** is met, be sure to consider whether the Applicant has had a variety of IMH leadership experiences that would indicate "mentor" status. You can refer to the examples at the top of the page

Supervision

- Required for IFS, IMHS, IMHM-Clinical. Optional for all others
- Is the provider endorsed at the appropriate Endorsement®? Please refer to the Endorsement® Registry found on the MI-AIMH website (http://mi-aimh.org/for-imh-professionals/endorsement/endorsement-registry/) to check the Endorsement® status of the listed supervisor
- Do the total number of hours meet the minimum required?
- Applicants for IMHM-Clinical need to have received a minimum of 25 of the hours about the RSC that the Applicant provides to others
- Were the minimum number of hours accrued over a period of time that was at least 12-months and not more than 24-months?
- Carefully read the description of each RSC experience. Does the narrative clearly meet the definition of RSC? If yes, click on "Edit Competencies." Change the status at the top from "Pending" to "Approved"
- As first Reviewer, you will select competencies based on the RSC experiences listed. Second Reviewer will select the competencies within the second column if s/he agrees with your list. Second Reviewer may add additional competencies
  - If the narrative does not meet the definition of RSC, use the Comments (private) section to alert the Administrator and specify the questions you have about the Applicant's experience
  - The Administrator will communicate with the Applicant about this and ask the Applicant to log back into EASy and update the identified section
  - The Administrator will communicate with the Reviewer when the update has been completed or if the Applicant does not meet the requirement
- Applicants for IMHM-Clinical will also list people/groups for whom they have provided RSC. For IMHM-Clinical, these listings should be cross-checked with entries under Work to be sure the Applicant has a minimum 3 years paid experience as a provider of RSC
- Click "Save" at the bottom of the page before moving to the next tab

Summary
- The Competencies grid on the left of the page will show what you have checked for each knowledge/skill area in Education, Work, Trainings, References, Supervision and Leadership (IMHM only)
- If you are the first Reviewer, your checks will be in the left column, second Reviewer checks are in the right column
- Move from the top to the bottom to determine if each knowledge/skill area has been adequately met
- If you are satisfied that a knowledge and/or skill area has been met, check the box under the "Approved" column
- Keep in mind that those in blue (*Theoretical Foundations* and *Direct Service Skills*) are considered the most critical
  - Competency can only be documented in these areas through Training and/or Education. *Work and/or References are not enough to document competency in these areas*

- o We do not define a minimum number of hours for those domains. Please refer to the Education and Training sections above and consider the questions outlined within each section. Use your best judgment about how much is "enough"
- When considering the knowledge/skills areas under Working with Others and Reflection, References are given more weight than Work and Training
- When considering what amount of Training and/or Education is adequate, you can refer to the Application Summary of trainings that were approved on the right side of the page for a thumbnail summary of each
  - o *For example, for an Infant Family Specialist Applicant, a 2-hour training on attachment is NOT enough to fulfill the knowledge/skill area of Attachment, Trauma, Grief and Loss; however, a 3-credit course on attachment OR a full day training on attachment would be enough to fulfill this competency. If you are unsure about whether an Applicant has fulfilled a competency, please use the Comments (private) section to communicate with the Administrator and/or other Reviewer*
- When considering the knowledge/skills areas under Working with Others and Reflection, References are given more weight than Work, Training, and Education
- To review the requirements, scroll down the Application Summary for a thumb nail of Membership, Agreement, Ethics, Education, Work, Training, Supervision, References, and Leadership (IMHM only)
- Take note to be sure Applicant has 30 or more approved training hours (EASy tallies this for you in the Application Summary at the bottom of the training list)
- **Click "Save" at the very bottom of the page before adding any Comments**
- After saving additions to the grid, use the Comments (private) section to list the Applicant's strengths as well as any competency gaps or concerns you may have. You can refer to comments made in earlier sections to assist with the summary. Recommendations will be communicated to the Applicant. If you cannot approve this Application, describe your concerns and identify training gaps, additional work or RSC experiences needed, etc.
  - o Example #1: Applicant has demonstrated strength in the areas of infant development/behavior and attachment through her training and work experience. Additionally, her reference raters spoke very highly of her. I believe she meets the minimum requirement for competency in Disorders of Infancy and Early Childhood but would encourage the applicant to seek out additional training on this area as she continues to attend trainings. Finally, I encourage her to continue in a regular and consistent RS relationship.
  - o Example #2: I am very impressed with applicant's profile. She has a lot of work experience. I agree with her reflective consultant in regards to her being very talented and skillful at such an early moment in her career. Areas to improve in: I know she has some training in screening and assessment; however I did not see a lot of training in the screening and assessment of infants and toddlers. She completed an online DECA; however I feel that more training (intense/longer) in the screening and assessment of infant and toddlers will be very beneficial and add to her skill set. Again, she may

- When you are finished, change the Status at the very bottom of the page to "Review 1 Complete" (or "Review 2 Complete", if you are the second Reviewer). You will be required to add text to the notes section when updating the status. A brief statement of "I approve for this IFA" or "I need more information before making a final decision" can go in this box. Click the update status button
- If there is disagreement or inconsistency between Reviewers, the Administrator can arrange a phone call or email discussion that includes the Administrator and both Reviewers to try to reach consensus
- Once consensus is obtained, the Administrator will contact the Applicant with the final recommendation about Endorsement® and will provide summary feedback from the Reviewers
- YOU MUST SHRED ANY AND ALL HARD COPIES OF TRANSCRIPTS AND RESUMES