OBJECTIVE ARTS KEY REPORTS

User Manual for Alameda County

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PRAED FOUNDATION

Contents

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Chapter 1: Introduction

This User Manual identifies four Objective Arts Key Reports for use with CANS and ANSA Data by Alameda County and its Providers. This User Manual is a result of a project with Chapin Hall, Cardenas Group and an Alameda County providers' work group. The goals of the project included the following:

a. **Identify Key Reports Formats:** Identify reports which have most value for use at individual level, staff level, and program/agency level.

b. **Customize Parameters of Key Reports:** For each key report format, identify the most valuable parameter settings; this may result in multiple versions of the same report set up with different parameters.

c. **Create a Common Language:** Identify a Naming Convention so that Key Reports can be easily located, referenced and communicated; e.g., "I ran the *Client Progress Initial to Discharge Key Report* and found…"

d. **Identify a Process for Key Reports**: Identify a process for how/when and why reports will be run; identify how reports will be distributed (push reports or pull reports?).

e. **Create a Common Understanding:** Document how to use each Key Report; create user guides with screenshots and example interpretations of mock data; a *Key Report User Guide* could be used as reference or for training staff; Additional parameter options; how to customize.

Through this project five Key Objective Arts Template Reports were identified as most valuable, in order of importance.

1. **Tickler with Episodes Report**

2. **Impact Report**

3. **TCOM Average Impact**

4. **TCOM Caseload Progress**

1.1 Scope

This document provides instructions for administrators and users of the four Key Reports. The document identifies uses of each report as well as a process for administrators to calibrate Report Templates and share them with staff. It also provides instruction for users to run and interpret reports.

1.2 Objective Arts Software

The reports described in this user manual are contained within the Reports module of the Objective Arts software. This manual has been created by a third party, the Praed Foundation. The report templates are developed and maintained as part of the Objective Arts software package. Any changes or technical support required for report errors should be directed to support of the Objective Arts software.

1.3 Overview of Reports

An overview of the four report templates and their uses are described here. Further information about each report can be found in its corresponding chapter (2-6) of this document.

Quality Assurance Reports

  A. **Key Report 01 – Reminder Report**
- Based on the Tickler with Episodes template
- Show progress of pre-specified questions over time
  - Uses:
    - ✓ Identify upcoming assessments which are due
    - ✓ Identify when clinicians are late with updating assessments
  - Pros:
    - ✓ Useful for sending out reminders
    - ✓ Useful for compliance reviews

  B. **Key Report 02 - Caseload Progress**
- Based on the TCOM Caseload Progress template
- Show clinician actionable item load by client
  - Uses:
    - ✓ Shows individual change in number of treatment needs for each client in a caseload for a clinician
  - Pros:
    - ✓ Can be used by supervisors or clinicians to review caseloads

Outcomes Reports

  A. **Key Report 03 – Item Impact Report**
- Based on the Impact template
- Lists Time1/Time2 change percentages
  - Uses:
    - ✓ Identifies proportions who were actionable at initial
    - ✓ Identifies of those actionable, percentage resolved, if discharged
  - Pros:
    - ✓ Could potentially identify items where programs are impacting issues and where programs are not making good progress on items

  B. **Key Report 04 – Domain Impact Report**
- Based on the TCOM Average Impact Template
- Shows Actionable Item progress by domain
  - Uses:
    - ✓ Compares time 1 average number of actionable treatment needs to time 2 average number of actionable treatment needs by domain
  - Pros:
    - ✓ Provides an indicator for comparison across groups

1.4 General Overview of Process to Administrate Reports

The general process will entail having an administrator or super user create a comprehensive complement of key report templates with specific parameters from each OA report template. For example, an administrator may create one report for each of the CANS/ANSA instruments for each reporting unit. Thus, one OA report template might be used to create a dozen key reports templates. The Admin will then share the Key Report templates with all of the relevant users. Users will run the reports and use this manual and associated training material to interpret the reports in order to make a decision regarding the care of the youth or the processes in the program.

1. **Admin Set Up Template Reports**
2. **Admin Uses Key Report Naming Convention**
3. **Admin Shares Template Reports**
4. **Users Run Report**
5. **User Interprets the Reports and Makes Decisions**

1.5 Establishing Templates for a Report

Administrators should establish as set of report templates with sets of desired parameters. Staff can either run each report template to review results immediately or have a pdf of the results sent to their email inbox.

To Set Up Templates for Your Staff to Use

1. Once logged into your account to create/view new reports click on the 'Reports' icon on the top left of your screen, as seen in **Figure 1.5.1**.

Figure 1.5.1 Creating a New Template
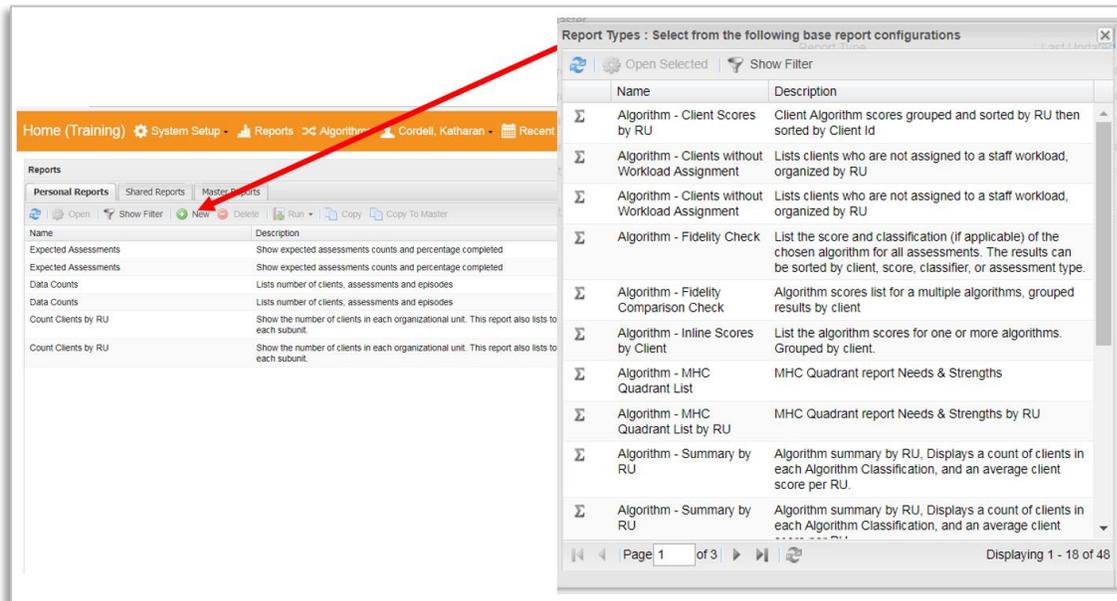
a) All of your personal saved reports will be displayed on this page along with a brief description of the report, the report type, and the date the report was last modified, as seen on **Figure 1.5.2**.

Figure 1.5.2 Display of the Listed Reports

1.6 Sharing Template Reports with Other Staff

Once a template is set up with the desired criteria in the Personal Reports tab, you can share it with other users by moving a copy of it to the Master Reports tab, as seen in **Figure 1.6.1**.

To Share Templates with Other Staff

1. From the Personal Reports tab, select the report template to share and select the 'Copy to Master' button, as seen in **Figure 1.6.1**. Select **OK** once prompted.
2. Move to the Master Reports tab. You may need to refresh the window in order to see the report.
3. As seen in **Figure 1.6.2**, double click on the template and now a 'Shared Roles' option appears in the report properties window. Expand the 'Shared Roles' and select the appropriate user types who will be able to use the report.
4. Save the report template properties. It should now appear in the Shared Reports tab for the appropriate user types.

Figure 1.6.1 Copy Report to Master Reports
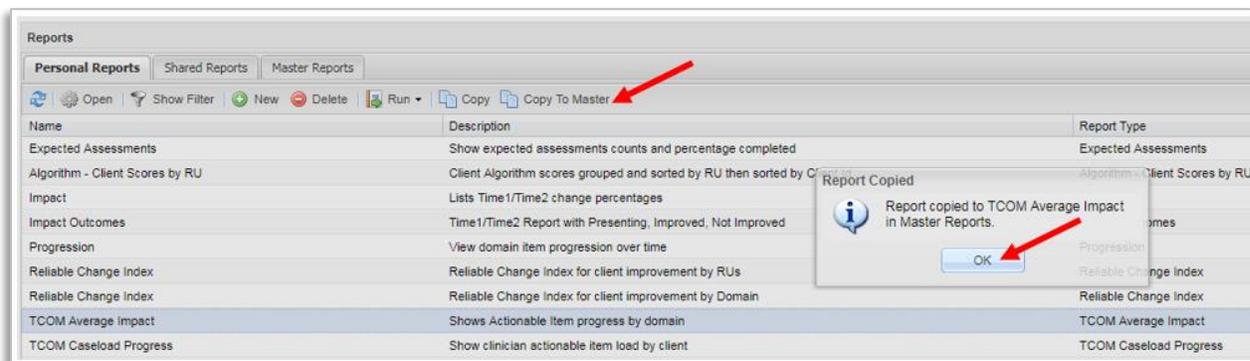
Figure 1.6.2 Share Master Report
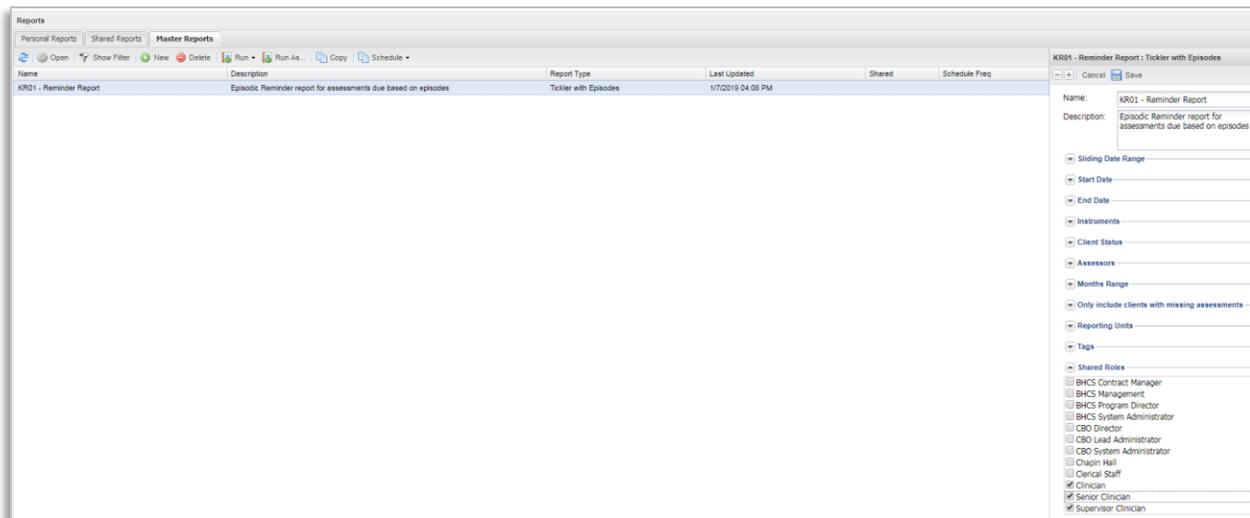
Chapter 2: Key Report 01 – Reminder Report

As seen in Figure 2.1, the Tickler with Episodes Report – which we refer to as the Key Report 01-Reminder Report – shows progress of pre-specified questions over time. It can be useful for sending out reminders of upcoming assessments due and identifying when clinicians are late with assessments for compliance reviews.

Figure 2.1 KR01 - Reminder Report Overview
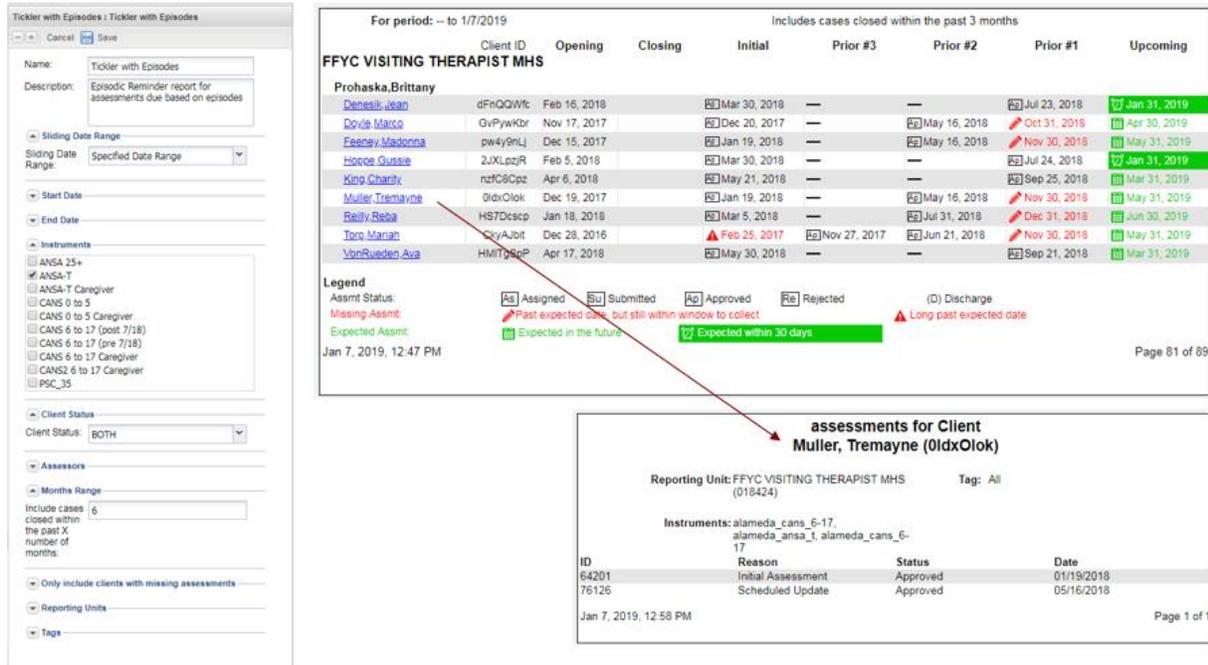
2.1 Establishing Templates of the Report

Administrators should establish a set of report templates with sets of desired parameters. For example, the administrator may want to create a report template for each reporting unit and/or for each assessment type. The report template names can be changed to reflect the specific parameter settings for that report (e.g., "KR01 Reminders – TBS Children" and "KR01 Reminders – FSP TAY"). Once the templates are established and shared with staff, staff can quickly run each report template to review results immediately or have a pdf of the results sent to their email inbox.

To Set Up Templates for Staff to Use:

1. Once logged into your account, navigate to the Reports section and follow the instructions in Section 1.5 to create a new report template selecting the **"Tickler with Episodes"** template; or double click on the template already established in your Personal Reports tab to modify your existing template.
    a) This will present the parameters for the selected report, as shown in **Figure 2.1.1**, in the section on the right side of your screen.
2. Set up the parameters for the report. The parameters for this template are listed in **Figure 2.1.1**.

Figure 2.1.1 List of Parameters for KR 01 Reminders Report

a) **Name & Description**
    i. As seen in Figure 2.1.1, the name and description are displayed at the top of the list of parameters. Create a user-friendly name and description specific to the report parameters set in the template. For example, you may want to name the report "KR01 Reminders - Lodi TBS Program for CANS" and give it a description which states: "This report provides reminders of upcoming and recently past due CANS for the Lodi TBS program."

        • Naming Convention: We suggest that you begin names of all templates for these reports as '**KR01 Reminders –**', representing that all templates belong to the same group of assessment reminder reports identified as 'Key Report 01'.

b) **Sliding Date Range or Specified Date Range**
    i. The Sliding Date Range is designed to allow users to select from various date ranges for the report, as shown in **Figure 2.1.2**. However, the date range for this report restricts the results to only those client placements which opened <u>and closed</u> within the date range specified. Therefore, do not include a date range and leave this field with its default values, as seen in **Figure 2.1.2**.

Note: Specifying a date range will create reports with few or no matching client placements. In order to view the report, leave this portion of the parameters empty.

Figure 2.1.2 Selecting Date Ranges for the Report
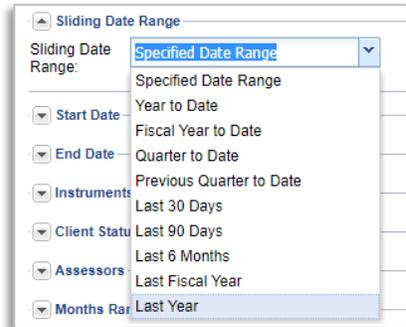
    ii. Clicking on 'Allow Runtime Override' will provide more time for long reports to run without a server timeout which could cancel long reports before they finish processing.

c) Instruments

    i. As seen in Figure 2.1.4, the 'Instruments' allow users to select the appropriate assessment type used for the report. The user can select one or more instruments, but at least one instrument must be selected.

Figure 2.1.4 Selecting the Assessment Type
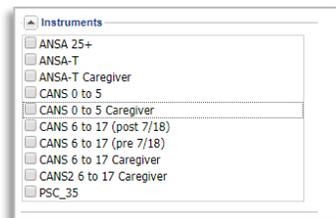
d) Client Status

    i. This is designed to allow the user to select active and/or inactive clients that would be included in the report, as shown in **Figure 2.1.5**. However, this report must be set to either ACTIVE_ONLY or BOTH. These options will return the same results, which will include active clients as well as recently closed clients within the 'Month Range' setting.

Note: Specifying INACTIVE_ONLY will result in a report with no information.

Figure 2.1.5 Selecting the Client Status
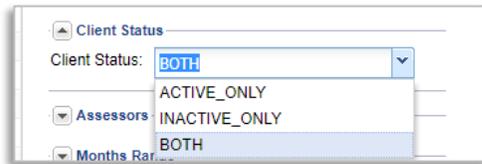
e) **Assessors**

    i. This allows the user to limit the report to just certain assessors who completed the assessment, as shown in **Figure 2.1.6**.

Figure 2.1.6 Selecting the Assessors
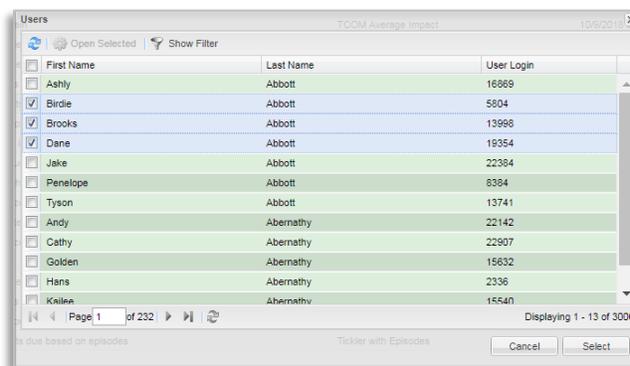
f) **Month Range**

    i. The Month Range allows the user to look at assessment completeness for client placements which were recently closed. As seen in **Figure 2.1.7**, setting the month range to 6 months, for example will return inactive cases which were closed in the last 6 months up to today's date in addition to open cases. If this field is left blank, the report will include all cases closed within the past 3 months from the End Date, by default.

Figure 2.1.7 Setting the Months Range

g) Only Include Clients with Missing Assessments

    i. Clicking the check box displayed in **Figure 2.1.8** will create reports that only display clients who have missing assessments. Clients with all assessments completed of those due will be excluded from the report.

Figure 2.1.8 Including Missing Assessment into the Report

h) Reporting Units

    i. Select the appropriate reporting unit for the report.

Figure 2.1.9 Selecting the Reporting Units

i) Tags

    i. This parameter allows users to identify any client demographics (e.g. ethnicity, language, etc.) on which to filter into the report, as shown in **Figure 2.1.10**.

Figure 2.1.10 Selecting Tags
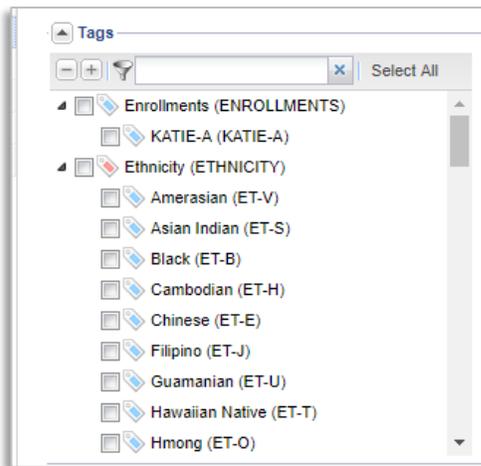
3. Click the 'Save' button at the top of the parameters box to save the changes made.

Note: This will cause the parameters region to appear to go blank, but the changes will be saved.

After the administrator creates several templates for staff to use, the administrator should share the templates with the staff who will run the report, as described in the instructions in 1.6 Sharing Template Reports with Other Staff. Staff will then see the templates in their Shared Reports tab.

2.2 Running and Interpreting Reports

Once report templates have been set up and shared with staff, staff can quickly run each report template to review results immediately or have a pdf of the results sent to their email inbox.

To Run the Report

1. Select the record from the Reports tab and then Click on the 'Run' icon at the top of the reports list, as shown in **Figure 2.2.1**, to perform one of the following functions. A drop-down menu will appear.

    a) Click on the 'Immediate' button to have the report pop up on your internet browser's next tab.

    b) Alternatively, click on the 'Delivered' to have the report sent to your email account.

    Figure 2.2.1 Running a Report
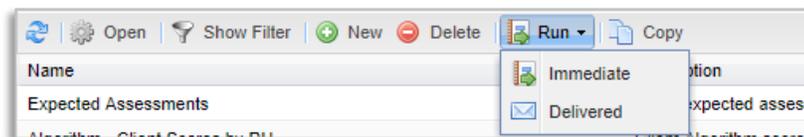
To Interpret the Report

1. The first pages of the report will display all of the Reporting Units which are represented by the data in the report. After that initial list of Reporting Units, the report will display pages which organize clients by Assessor, with the Assessor's name at the top of the first column, as seen in **Figure 2.2.2**. Each client will have an Opening Date and a Closing Date (if applicable). The Closing Date represents the date the episode was closed, if it is closed.

2. Assessments are displayed horizontally and include the initial (in the "Initial" column) and three most recent prior assessments (in the "Prior #1", "Prior #2" and "Prior #3" columns). If more than four assessments exist, then those which are before the three most prior and after the initial will not display. In addition, the next upcoming assessment due date is displayed in the farthest right column with the header "Upcoming".

3. Assessments which were completed show in black text.

   a) Completed assessment also display a status box, which could include:

      i. As = Assigned

      ii. Su = Submitted

      iii. Ap = Approved

      iv. Re = Rejected

      v. De = Deleted

   b) If the assessment satisfies the requirements for the collection window for a discharge, then a (D) will also appear following the assessment date.

4. Assessments which are past due show in red text.

   a) An assessment becomes past due on the day after it was due.

      i. If a pencil shows next to the past due assessment, this means that the window to collect the assessment is still open, and a user can still submit an assessment to comply with an allowable timely assessment window. In this case, once the assessment is submitted, the red text will turn to black and show the actual date the assessment was collected.

      ii. Alternatively, if a triangle exclamation icon is displaying next to the red text, this means that the assessment is long past due and that the allowable assessment collection window has closed. In this case, the user can still submit an assessment, but the submitted assessment will not clear out the past due assessment. The newly submitted assessment will show in black but will not satisfy the prior assessment due, which will continue to display in red with a triangle exclamation icon.

Figure 2.2.2 Interpreting the Main Report
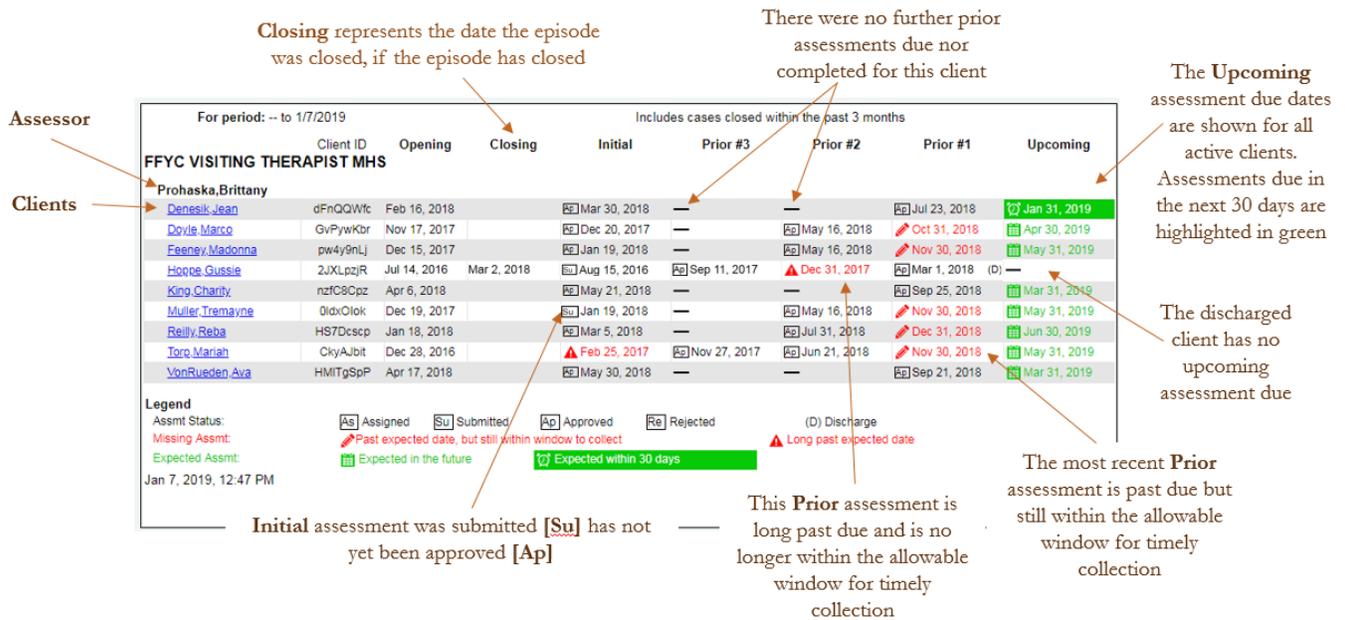
5. As seen in **Figure 2.2.3**, clicking on a specific client name will launch a sub report displaying all of the Assessments for the case, including Reason, Status and Date.

Figure 2.2.3 Interpreting the Sub Report
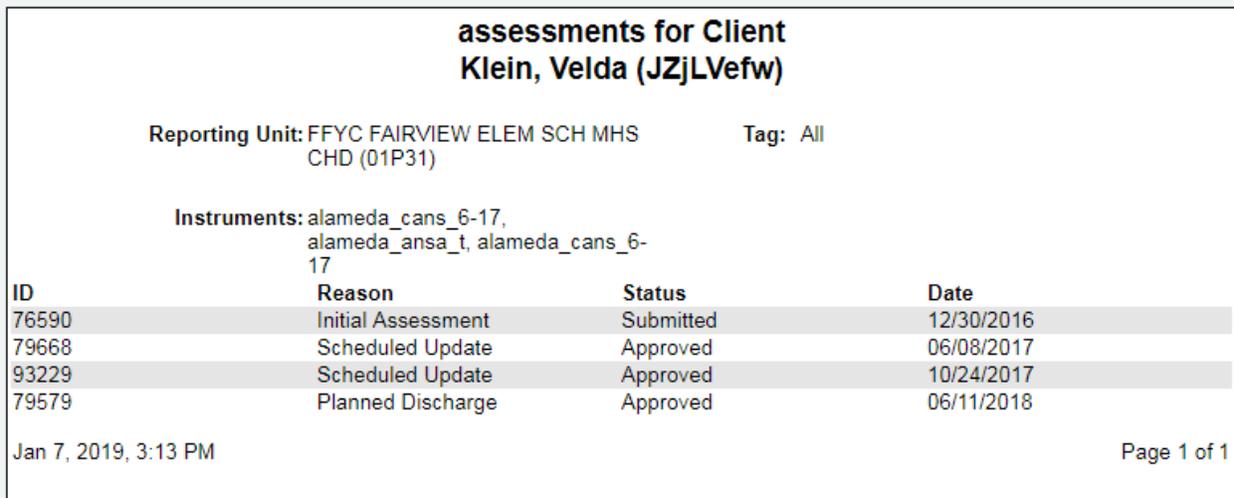
Chapter 3: Key Report 02 - Caseload Progress

As seen in **Figure 3.1**, the TCOM Caseload Progress Report – which we refer to as the Key Report 02 – Caseload Progress – displays the progress of an Assessor's clients throughout updates of each client's assessments. It can be useful for tracking when assessments have been completed and for tracking the progress of a client under all or individual domains in that assessment.

Figure 3.1 KR02 - Caseload Progress Report Overview
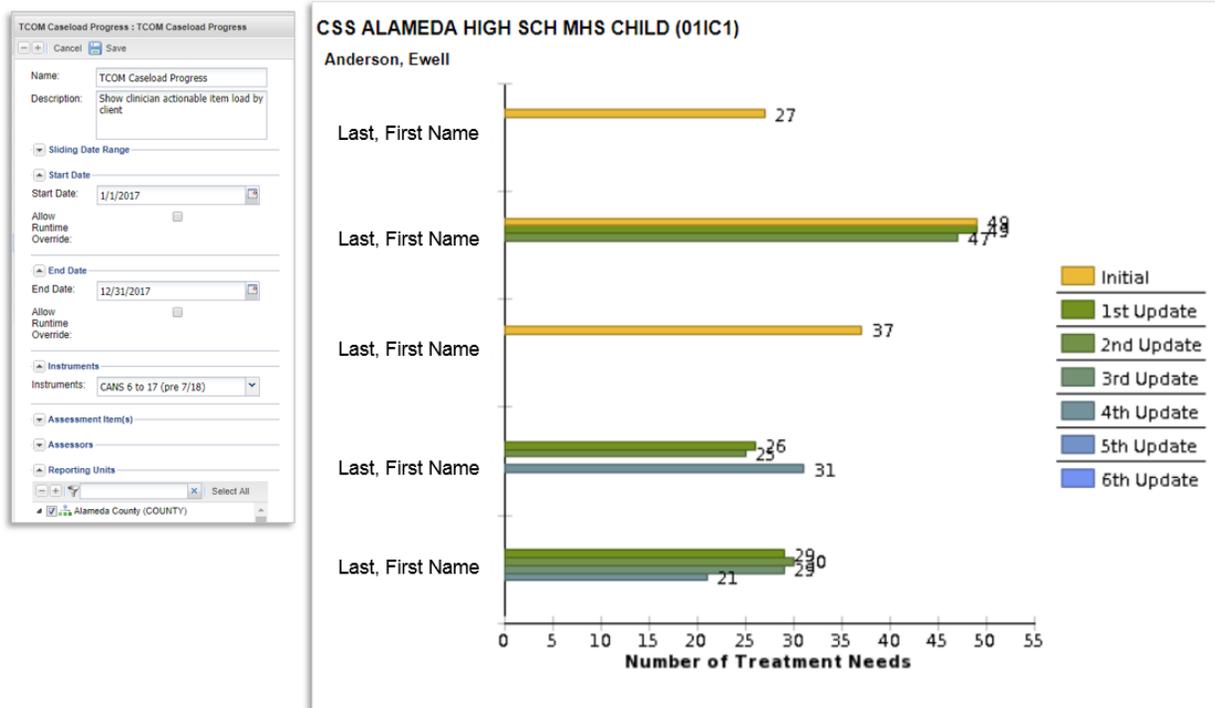
3.1 Establishing Templates of the Report

Administrators should establish a set of report templates with sets of desired parameters. For example, the administrator may want to create a report template for each reporting unit and/or for each assessment type. The report template names can be changed to reflect the specific parameter settings for that report (e.g., "KR02 Caseload Progress – TBS Children" and "KR02 Caseload Progress – FSP TAY"). Once the templates are established and shared with staff, staff can quickly run each report template to review results immediately or have a pdf of the results sent to their email inbox.

To Set Up Templates for Staff to Use:

1. Once logged into your account, navigate to the Reports section and follow the instructions in Section 1.5 to create a new report template selecting the **"TCOM Caseload Progress"** template; or double click on the template already established in your Personal Reports tab to modify your existing template.

a) This will present the parameters for the selected report, as shown in **Figure 3.1.1**, in the section on the right side of your screen.

2. Set up the parameters for the report. The parameters for this template are listed in **Figure 3.1.1**.

Figure 3.1.1 List of Parameters for Tickler with Episodes Report

a) **Name & Description**
   i. As seen in **Figure 3.1.1**, the name and description are displayed at the top of the list of parameters. Create a user-friendly name and description specific to the report parameters set in the template. For example, you may want to name the report "KR02 Caseload Progress – Strengths in Lodi TBS Program" and give it a description which states: "This report provides caseload progress for each client's actionable strength items over time for the Lodi TBS program."
      - Naming Convention: We suggest that you begin names of all templates for these reports as '**KR02 Caseload Progress –**'. For example, '**KR02 Caseload Progress – Strengths'** represents that a template belonging to the same group of reports identified as 'Key Report 02' demonstrating caseload progress, specifically in the strengths domain items.

b) **Sliding Date Range or Specified Date Range**
   i. The Sliding Date Range allows users to select from various date ranges for the report, as shown in **Figure 3.1.2**. These prespecified date ranges will include all open cases along with any cases which were closed during the period specified.

Note: The report will always return all open cases regardless of date selection. Selecting the sliding or specified date range only adjusts which closed cases are included in the report.

Figure 3.1.2 Selecting Date Ranges for the Report
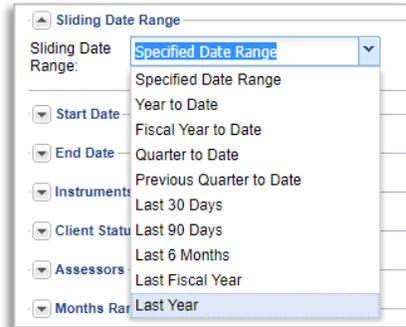
ii. Alternatively, selecting 'Specified Date Range' in the Sliding Date Range parameter will allow you to adjust the 'Start Date' and 'End Date' in which to include closed cases, as seen in **Figure 3.1.3.**

iii. In the example in Figure 3.1.3, the report will include all currently open cases as well as all cases which were closed between 1/1/2017 and 12/31/2017.

Figure 3.1.3 Selecting Specific Start and End Dates
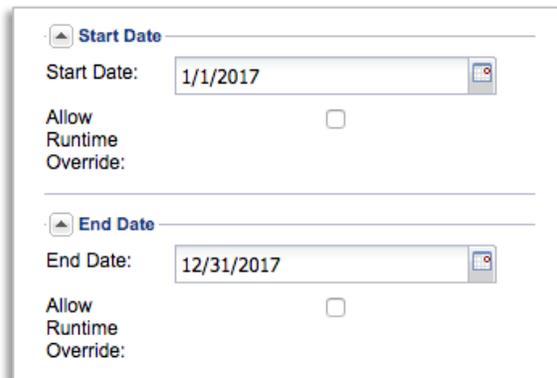
iv. Clicking on 'Allow Runtime Override' will provide more time for long reports to run without a server timeout which could cancel long reports before they finish processing.

c) **Instruments**

i. As seen below in **Figure 3.1.4**, the 'Instruments 'allow users to select the appropriate assessment type for the report.

Figure 3.1.4 Selecting the Assessment Type
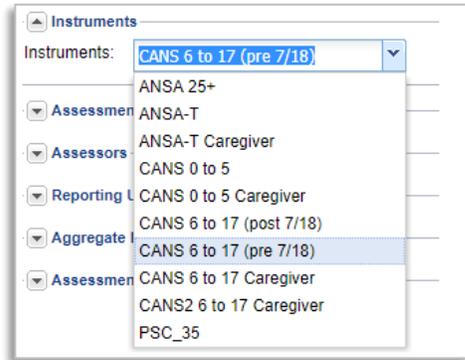
d) Assessment Item(s)

    i.   In this section, as seen in **Figure 3.1.5**, select the domains and items to be included in the report. The report will count up all selected items which were scored as a 2 or 3 on an assessment as a total number of Treatment Needs for that assessment. For example, if you select only the Caregiver Needs domain and all its items, the report will display the specific number of Treatment Needs (scored as 2 or 3) for caregivers.

    ii.   Alternatively, click 'Select All' if you would like to produce a report with all the domains as seen as seen below in **Figure 3.1.5**.

Figure 3.1.5 Assessment Items Selection
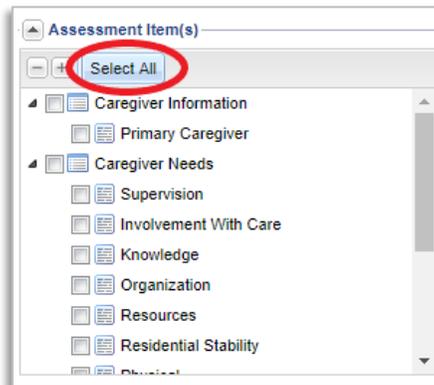
    iii.   To create a report with only a set of specific item(s), you may click the check box next to the each individual item, as desired.

Note: If no assessment items are selected, you <u>will not </u>be able to save or run a report.

e) Assessors

  i. This allows the user to limit the report to just certain assessors as shown in **Figure 3.1.6**.

Figure 3.1.6 Selecting the Assessors
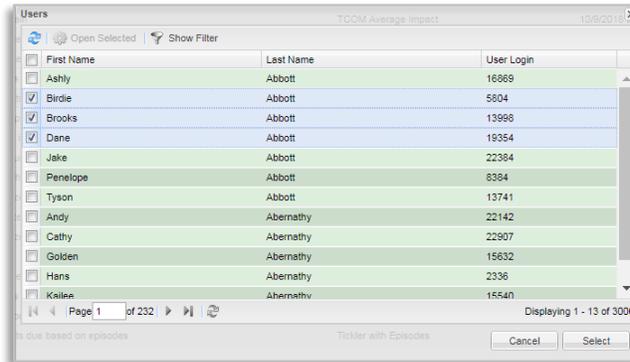
f) Reporting Units

  i. Select the appropriate reporting unit for the report, as seen in **Figure 3.1.7**.

Figure 3.1.7 Selecting the Reporting Units
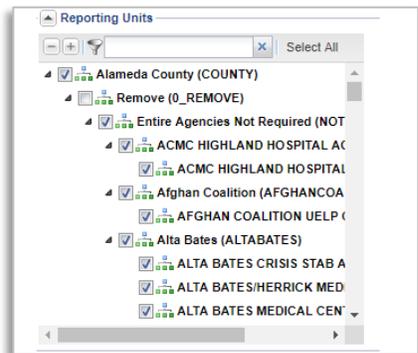
g) Aggregate RU

  iv. Click the check box in this section to merge all clients in the same caseload across Reporting Units for an Assessor. This will only affect the report if an Assessor has clients across multiple Reporting Units. If the box is not checked, the Assessor's clients will be displayed in separate sections respective to their Reporting unit, as that Assessor will be displayed in each Reporting Unit for which the Assessor has clients.

h) Assessment Status(es)

  i. As shown below in **Figure 3.1.8,** this parameter allows users to select one or more stages of assessments' status for the report. For example, the user may want to restrict the report to count treatment needs from only 'Approved' assessments.
  Figure 3.1.8 Assessment Status Selection
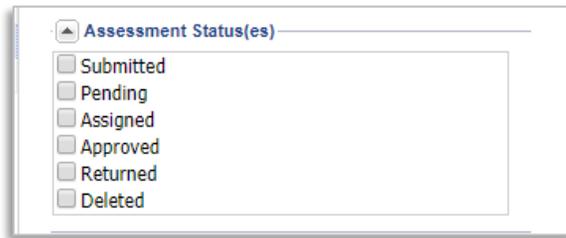
3. Click the 'Save' button at the top of the parameters box to save the changes made.

> Note: This will cause the parameters region to appear to go blank, but the changes will be saved.

After the administrator creates several templates for staff to use, the administrator should share the templates with the staff who will run the report, as described in the instructions in 1.6 Sharing Template Reports with Other Staff. Staff will then see the templates in their Shared Reports tab.

3.2 Running and Interpreting Reports

Once report templates have been set up and shared with staff, staff can quickly run each report template to review results immediately or have a pdf of the results sent to their email inbox.

To Run the Report

6. Select the record from the Reports tab and then Click on the 'Run' icon at the top of the reports list, as shown in **Figure 3.2.1**, to perform one of the following functions. A drop-down menu will appear.
    a) Click on the 'Immediate' button to have the report pop up on your internet browser's next tab.
    b) Alternatively, click on the 'Delivered' to have the report sent to your email account.

Figure 3.2.1 Running a Report
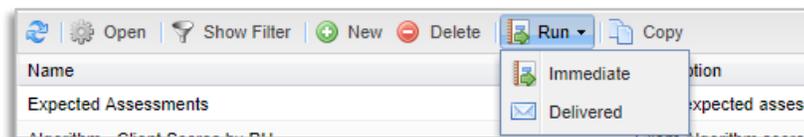
To Interpret the Report

The first pages of the report will display all of the Reporting Units which are represented by the data in the report. After that initial list of Reporting Units and as seen in **Figure 3.2.2**, the report will display sets of clients for each Assessor, as many as five clients to a page. Each assessment for a client will be stacked vertically from top (earliest) to bottom (latest) assessment. The total count of treatment needs (items scored as 2 or 3) on that assessment for the items selected for inclusion in the report are displayed as a bar.

Figure 3.2.2 Interpreting the Report

Reporting Unit — CSS ALAMEDA HIGH SCH MHS CHILD (01IC1)
Assessor — Anderson, Ewell
Clients — Last, First Name

This client had 49 treatment needs on the Initial assessment and the 1st Update but had 47 treatment needs on the 2nd Update

Assessments:
- Initial
- 1st Update
- 2nd Update
- 3rd Update
- 4th Update
- 5th Update
- 6th Update

Number of Treatment Needs
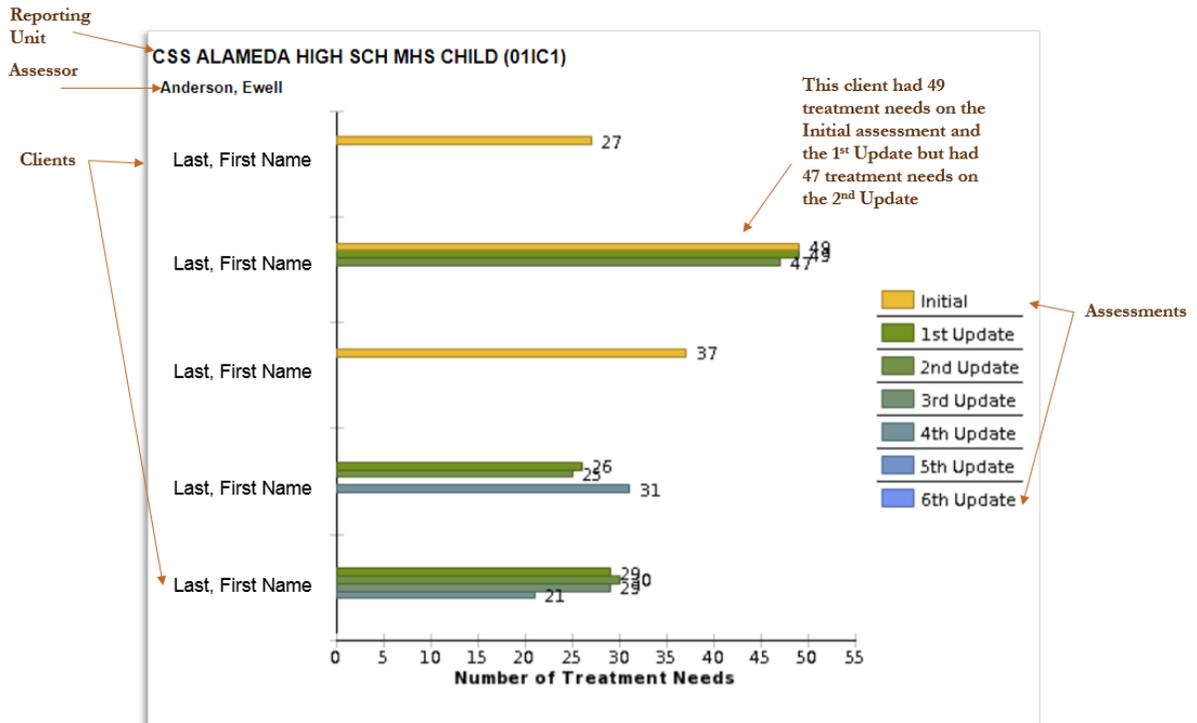
Note: It is important to note that if a client has 49 treatment needs at initial and 49 treatment needs at 1st update, as is displayed in the example in Figure 3.2.2, that this does not mean that nothing has changed. Many of the treatment needs from the initial could have been resolved, but just as many new treatment needs were discovered. For example, 10 treatment needs might have been addressed and 10 new treatment needs discovered. It is common early in an episode to discover new items as staff build trusting relationships with clients and as clients continue to share or develop their stories.

Chapter 4: Key Report 03 – Item Impact Report

As seen in Figure 4.1, the Item Impact Report – which we refer to as the Key Report 03-Item Impact Report - shows the percentage of the domain scores at the initial assessment, initial and discharge assessments, and groups the clients based on their score in the assessment.

Figure 4.1 KR03 – Item Impact Report Overview
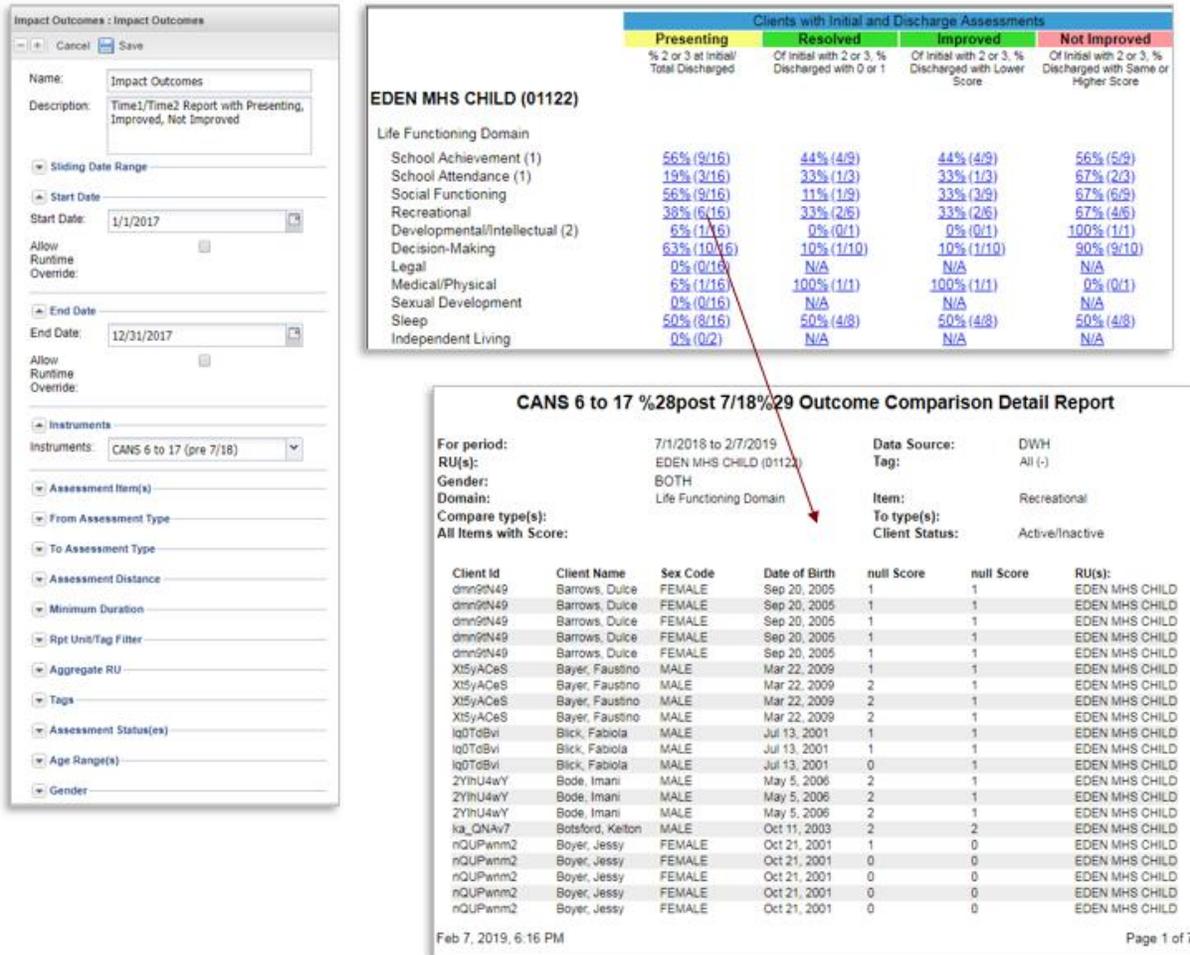
4.1 Establishing Templates of the Report

Administrators should establish a set of report templates with sets of desired parameters. For example, the administrator may want to create a report template for each reporting unit and/or for each assessment type – or for a specific set of domain items, such as for a strengths report. The report template names can be changed to reflect the specific parameter settings for that report (e.g., "KR03 Item Impact – TBS Children" and "KR03 Item Impact – FSP TAY"). Once the templates are established and shared with staff, staff can quickly run each report template to review results immediately or have a pdf of the results sent to their email inbox.

To Set Up Templates for Staff to Use:

1. Once logged into your account, navigate to the Reports section and follow the instructions in Section 1.5 to create a new report template selecting the **"Impact Outcome Report"** template; or double click on the template already established in your Personal Reports tab to modify your existing template.
   a) This will present the parameters for the selected report, as shown in **Figure 4.1.1**, in the section on the right side of your screen.
2. Set up the parameters for the report. The parameters for this template are listed in **Figure 4.1.1**.

Figure 4.1.1 List of Parameters for Report

a) **Name & Description**
   i. As seen in **Figure 4.1.1**, the name and description are displayed at the top of the list of parameters. Create a user-friendly name and description specific to the report parameters set in the template. For example, you may want to name the report "KR03 Item Impact on Risk Behaviors – Lodi TBS Program" and give it a description which states: "This report provides the proportion of children/youth presenting with risk behaviors (scored as 2 or 3) as well as the proportion of

youth who resolved, improved or worsened in scores for risk behaviors for the Lodi TBS program."

      1. Naming Convention: We suggest that you begin names of all templates for these reports as '**KR03 Item Impact on XXX –**', representing that all templates belong to the same group of reports identified as 'Key Report 03' demonstrating impact on some set of domain items (replace XXX with the specific domain items or with 'All Items').

b) **Time 1 Sliding Date Range or Start Date**

    i. The Time 1 Sliding Date Range allows users to select from various date ranges to restrict the "From Assessment Type" for the report, as shown in **Figure 4.1.2**.

      1. The Time 1 Sliding Date Range binds Time 1 of the From Assessment Type selected for the report. For example, if the user selects 'Initial' for the From Assessment Type, then the Sliding Date Range will include records which have an Initial Assessment within the sliding date range selection.

Figure 4.1.2 Selecting Time 1 for Report

    ii. Alternatively, selecting nothing in the Time 1 Sliding Range, but then entering dates in the 'Time 1 Start Date' and 'Time 1 Ending Date' will allow you to limit the Time 1 Assessments to the date range entered, as seen in **Figure 4.1.2**.

    iii. Alternatively, selecting noting in the Time 1 date fields will allow the Time 1 Assessments to be from any time period.

iv. Clicking on 'Allow Runtime Override' will provide more time for long reports to run without a server timeout which could cancel long reports before they finish processing.

c) **Time 2 Sliding Date Range or Start Date**
    i. The Time 2 Sliding Date Range allows users to select from various date ranges to restrict the "To Assessment Type" for the report, as shown in **Figure 4.1.3**.
        1. The Time 2 Sliding Date Range binds Time 2 of the From Assessment Type selected for the report. For example, if the user selects 'Planned Discharge' for the To Assessment Type, then the Sliding Date Range will include records which have a Planned Discharge Assessment within the sliding date range selection.

Figure 4.1.3 Selecting a Time 2 Date for Report

i. Alternatively, selecting nothing in the Time 2 Sliding Range, but then entering dates in the 'Time 2 Start Date' and 'Time 2 Ending Date' will allow you to limit the Time 2 Assessments to the date range entered, as seen in **Figure 4.1.3**.
ii. Alternatively, selecting noting in the Time 2 date fields will allow the Time 2 Assessments to be from any time period.
iii. Clicking on 'Allow Runtime Override' will provide more time for long reports to run without a server timeout which could cancel long reports before they finish processing.

d) **Instruments**
    i. As seen below in **Figure 4.1.4**, the 'Instruments' allows users to select the appropriate assessment type used for the report.

Figure 4.1.4 Selecting the Assessment Type
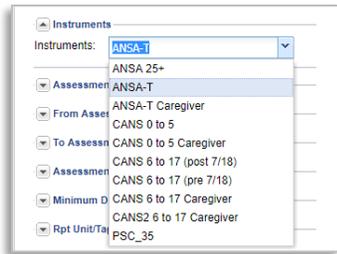
e) **Assessments Item(s)**

    i. In this section, as seen in **Figure 4.1.5**, select the domains and items to be included in the report. The report will include a count of all clients assessed as well as a count of those presenting with a score of 2 or 3.

    ii. Alternatively, click 'Select All' if you would like to produce a report with all the domains as seen as seen below in **Figure 4.1.5**.

Figure 4.1.5 Assessment Items Selection
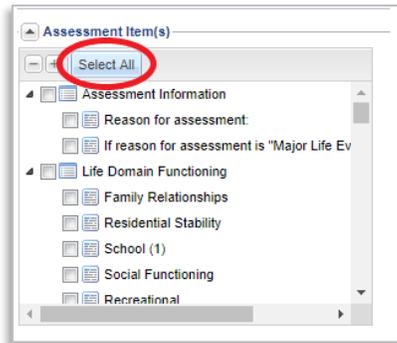
iii. To create a report with a specific domain(s) you may click the check box next to the domain(s) desired.

Note: If an assessment item is not selected, you <u>will not </u>be able to save or run a report.

---

f) **From Assessment Type**

i. As seen in **Figure 4.1.6**., this parameter sets the primary boundary for the *Assessment Time 1* from when the initial assessment was taken. Different options will appear depending on the Instrument selected.

Figure 4.1.6 Selecting Assessment Type Primary Boundary

Note: Failing to select a parameter in this option <u>will prevent </u>the report to be saved or run.

---

g) **To Assessment Type**

i. As seen in **Figure 4.1.7**, this parameter identifies the types of Assessments for Time 2. If multiple options are selected, it will take the last assessment of the qualifying assessment for each client.

Figure 4.1.7 Assessment Type Secondary Boundary
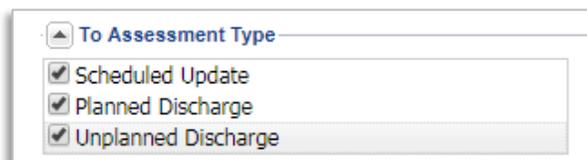
Note: After running the report, the 'To Assessment Type' parameter will be displayed as 'Discharge' in the results, but it may include only Scheduled Updates if it is the only option selected.

h) **Assessment Distance**

    i. This allows users to input a minimum number of months in between the *Assessment Time 1 Date* and the *Assessment Time 2 Date* for the clients, as shown in **Figure 4.1.8**.

    Figure 4.1.8 Assessment Distance
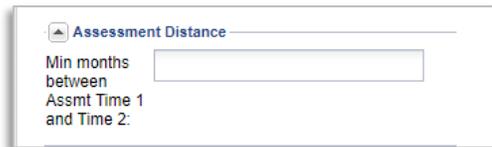
i) **Minimum Duration**

    i. This allows users to input a minimum number of months in between the *Episode Start Date* and the *Assessment Time 2 Date* for the clients, as shown in **Figure 4.1.9**. The Assessment Start Date is usually before the Assessment Time 1 Date, and therefore allows for a slightly different time restriction criteria as compared to the Assessment Distance criterion.

    Figure 4.1.9 Minimum Duration

j) **RPT Unit/Tag Filter**

    i. With the **Reporting Units** toggle selected, select the appropriate reporting unit for the report, as seen in **Figure 4.1.10**.
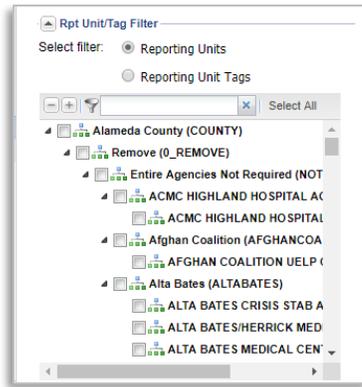
Figure 4.1.10

ii. Alternatively, switch the toggle to the **Reporting Unit Tags** option and select a tag which would be associated with a group of reporting units, such as TBS, for example.

Figure 4.1.11
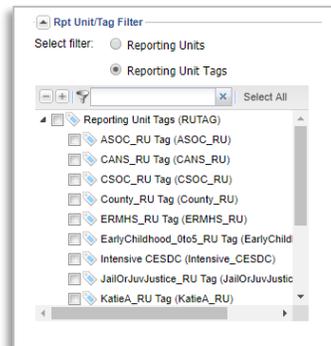
Note: A selection must be made from either the Reporting Units or the Reporting Unit Tags options for the report to run. Switching between the toggles clears the selections. Selections can only be made on one of the options.

k) Aggregate RU

    i. Click the check box in this section to merge data across all reporting units selected for the report. This will show the results in one final table containing all reporting units combined.

l) Tags

    i. This parameter allows users to identify any client demographics (e.g. ethnicity, language, etc.) they wish to filter into the report, as shown in **Figure 4.1.12.**

Figure 4.1.12 Client Tags
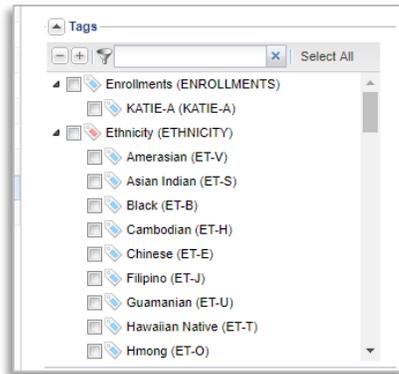
m) **Assessment Status(es)**

    i. As shown in **Figure 4.1.13**, this parameter allows users to select one or multiple stages of the assessment's status for the report. By default, **Submitted** and **Approved** assessments are selected for inclusion in the report.

Figure 4.1.13 Selecting Assessment Status
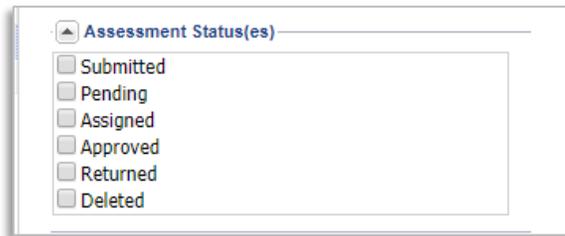
n) **Age Range(s)**

    i. Users may select a specific age range for their report, as seen in **Figure 4.1.14.**

Figure 4.1.14 Selecting an Age Range

Note: If an age range is not selected, the software will run all the ages in the report by default.

o) **Gender**

    i. Optionally, select a gender to limit the report to a Males or Females.

Figure 4.1.14 Selecting an Age Range
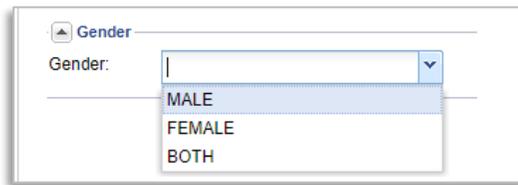
> Note: If a gender is not selected, the software will run both genders in the report by default.

3. Click the 'Save' button at the top of the parameters box to save the changes made.

> Note: This will cause the parameters region to appear to go blank, but the changes will be saved.

After the administrator creates several templates for staff to use, the administrator should share the templates with the staff who will run the report, as described in the instructions in 1.6 Sharing Template Reports with Other Staff. Staff will then see the templates in their Shared Reports tab.

4.2 Running and Interpreting Reports

Once report templates have been set up and shared with staff, staff can quickly run each report template to review results immediately or have a pdf of the results sent to their email inbox.

To Run the Report

1. Select the record from the Reports tab and then Click on the 'Run' icon at the top of the reports list, as shown in **Figure 4.2.1**, to perform one of the following functions. A drop-down menu will appear.
   c) Click on the 'Immediate' button to have the report pop up on your internet browser's next tab.
   d) Alternatively, click on the 'Delivered' to have the report sent to your email account.

Figure 4.2.1 Running a Report
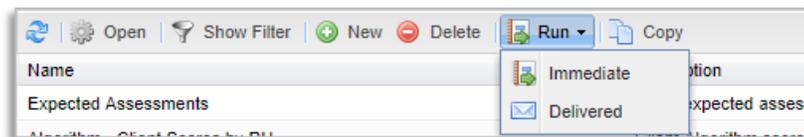
To Interpret the Report

1. The first pages of the report will display all of the Reporting Units which are represented by the data in the report. After that initial list of Reporting Units and the report will display the resulting tables for each reporting unit or for all reporting units combined if the Aggregate RU

option was selected, as in the example in **Figure 4.2.2.** Some of the report parameters (Discharge Reasons, Assessment Statuses and Items) appear prior to the first table.

2. Clicking on any of the hyperlink values in the table of the report will open a sub report of the clients represented by the denominator of the hyperlinked value, as seen in **Figure 4.2.3**.

Figure 4.2.2 Interpreting the Report

Presenting column shows the proportion of clients who had a 2 or 3 of those who scored the item.

The number of clients counted in each row may fluctuate as clients are excluded if they did not answer or answered "N/A" on items.

Clicking on any value will generate another report in a new tab which will show all assessments for these clients.

Items included in the report are listed and organized by domain. This report includes **Life Functioning Domain** Items

Resolved column shows the proportion of client who had an actionable presenting item which was resolved to a score of 0 or 1 by Time 2, which is often discharge, but could be latest schedule update if selected as the To Assessment.

Improved column represents the proportion of clients who had an actionable presenting item which improved in any way at Time 2. This includes all those in the Resolved column plus any items which presented as a score of 3 and improved to a score of 2.

Not Improved column represents the proportion of clients who had an actionable presenting item which stayed the same or increased from 2 to 3 by Time 2.

	Clients with Initial and Discharge Assessments			
	Presenting % 2 or 3 at Initial/ Total Discharged	**Resolved** Of Initial with 2 or 3, % Discharged with 0 or 1	**Improved** Of Initial with 2 or 3, % Discharged with Lower Score	**Not Improved** Of Initial with 2 or 3, % Discharged with Same or Higher Score
EDEN MHS CHILD (01122)				
Life Functioning Domain				
School Achievement (1)	56% (9/16)	44% (4/9)	44% (4/9)	56% (5/9)
School Attendance (1)	19% (3/16)	33% (1/3)	33% (1/3)	67% (2/3)
Social Functioning	56% (9/16)	11% (1/9)	33% (3/9)	67% (6/9)
Recreational	38% (6/16)	33% (2/6)	33% (2/6)	67% (4/6)
Developmental/Intellectual (2)	6% (1/16)	0% (0/1)	0% (0/1)	100% (1/1)
Decision-Making	63% (10/16)	10% (1/10)	10% (1/10)	90% (9/10)
Legal	0% (0/16)	N/A	N/A	N/A
Medical/Physical	6% (1/16)	100% (1/1)	100% (1/1)	0% (0/1)
Sexual Development	0% (0/16)	N/A	N/A	N/A
Sleep	50% (8/16)	50% (4/8)	50% (4/8)	50% (4/8)
Independent Living	0% (0/2)	N/A	N/A	N/A

Social Functioning Not Improved – for the nine clients who presented with a score of 2 or 3, six (66%) had the same or an increased score at Time 2.

Social Functioning Presenting – for the Social Functioning Item, nine (56%) clients scored a 2 or 3 out of 16 clients scored for this item.

Social Functioning Resolved – for the nine clients who presented with a score of 2 or 3, one (11%) had a score of 0 or 1 at Time 2

Social Functioning Improved – for the nine clients who presented with a score of 2 or 3, three (33%) had an improvement in score at Time 2.

Figure 4.2.3 Item Impact Report Hyperlinked Sub Report

CANS 6 to 17 %28post 7/18%29 Outcome Comparison Detail Report

For period:	7/1/2018 to 2/7/2019		Data Source:	DWH	
RU(s):	EDEN MHS CHILD (01122)		Tag:	All (-)	
Gender:	BOTH				
Domain:	Life Functioning Domain		Item:	Recreational	
Compare type(s):			To type(s):		
All Items with Score:			Client Status:	Active/Inactive	

Client Id	Client Name	Sex Code	Date of Birth	null Score	null Score	RU(s):
dmn9tN49	Barrows, Dulce	FEMALE	Sep 20, 2005	1	1	EDEN MHS CHILD
dmn9tN49	Barrows, Dulce	FEMALE	Sep 20, 2005	1	1	EDEN MHS CHILD
dmn9tN49	Barrows, Dulce	FEMALE	Sep 20, 2005	1	1	EDEN MHS CHILD
dmn9tN49	Barrows, Dulce	FEMALE	Sep 20, 2005	1	1	EDEN MHS CHILD
dmn9tN49	Barrows, Dulce	FEMALE	Sep 20, 2005	1	1	EDEN MHS CHILD
Xt5yACeS	Bayer, Faustino	MALE	Mar 22, 2009	1	1	EDEN MHS CHILD
Xt5yACeS	Bayer, Faustino	MALE	Mar 22, 2009	2	1	EDEN MHS CHILD
Xt5yACeS	Bayer, Faustino	MALE	Mar 22, 2009	2	1	EDEN MHS CHILD
Xt5yACeS	Bayer, Faustino	MALE	Mar 22, 2009	2	1	EDEN MHS CHILD
lq0TdBvi	Blick, Fabiola	MALE	Jul 13, 2001	1	1	EDEN MHS CHILD
lq0TdBvi	Blick, Fabiola	MALE	Jul 13, 2001	1	1	EDEN MHS CHILD
lq0TdBvi	Blick, Fabiola	MALE	Jul 13, 2001	0	1	EDEN MHS CHILD
2YIhU4wY	Bode, Imani	MALE	May 5, 2006	2	1	EDEN MHS CHILD
2YIhU4wY	Bode, Imani	MALE	May 5, 2006	2	1	EDEN MHS CHILD
2YIhU4wY	Bode, Imani	MALE	May 5, 2006	2	1	EDEN MHS CHILD
ka_QNAv7	Botsford, Kelton	MALE	Oct 11, 2003	2	2	EDEN MHS CHILD
nQUPwnm2	Boyer, Jessy	FEMALE	Oct 21, 2001	1	0	EDEN MHS CHILD
nQUPwnm2	Boyer, Jessy	FEMALE	Oct 21, 2001	0	0	EDEN MHS CHILD
nQUPwnm2	Boyer, Jessy	FEMALE	Oct 21, 2001	0	0	EDEN MHS CHILD
nQUPwnm2	Boyer, Jessy	FEMALE	Oct 21, 2001	0	0	EDEN MHS CHILD
nQUPwnm2	Boyer, Jessy	FEMALE	Oct 21, 2001	0	0	EDEN MHS CHILD

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Chapter 5: Key Report 04 - Domain Impact Report

The Domain Impact report shows actionable item progress by domain. User can compare time 1 average number of actionable treatment needs to time 2 average number of actionable treatment needs by domain to identify overall improvements in actionable items by domain.

Figure 5.1 KR04 – Domain Impact Report Overview
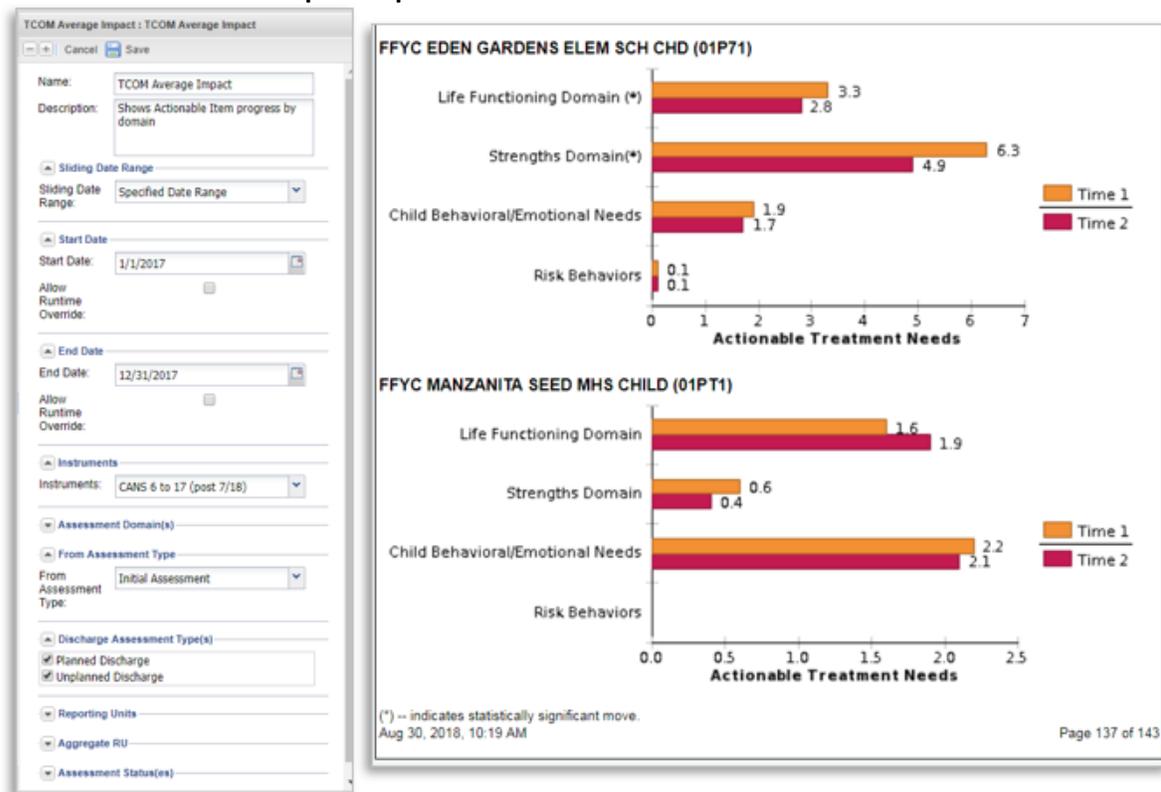
5.1 Establishing Templates of the Report

Administrators should establish a set of report templates with sets of desired parameters. For example, the administrator may want to create a report template for each reporting unit and/or for each assessment type – or for a specific domain, such as for a strengths report. The report template names can be changed to reflect the specific parameter settings for that report (e.g., "KR04 Domain Impact – TBS Children" and "KR03 Domain Impact – FSP TAY"). Once the templates are established and shared with staff, staff can quickly run each report template to review results immediately or have a pdf of the results sent to their email inbox.

To Set Up Templates for Staff to Use

1. Once logged into your account, navigate to the Reports section and follow the instructions in Section 1.5 to create a new report template selecting the **"TCOM Average Impact"** template; or

double click on the template report already established in your Personal Reports tab to modify your existing template.

   a) This will present the parameters for the selected report, as shown in **Figure 5.1.1**, in the section on the right side of your screen.
2. Set up the parameters for the report. The parameters for this template are listed in **Figure 5.1.1**.

Figure 5.1.1 List of Parameters for the Report

   a) **Name & Description**
       ii. As seen in **Figure 5.1.1**, the name and description are displayed at the top of the list of parameters. Create a user-friendly name and description specific to the report parameters set in the template. For example, you may want to name the report "KR04 Domain Impact on Core+Suicide at Planned Discharge – Lodi TBS" and give it a description which states: "This report provides the average number of treatment needs per child for each of the core domains plus the Suicide Risk module – comparing initial to planned discharge."
           1. Naming Convention: We suggest that you begin names of all templates for these reports as '**KR04 Domain Impact on XXX –**', representing that all templates belong to the same group of reports identified as 'Key Report 04' demonstrating impact on some set of domains (replace XXX with the specific domains).
   b) **Sliding Date Range or Specified Date Range**
       iii. The Sliding Date Range allows users to select from various date ranges for the report, as shown in **Figure 5.1.2**.

Figure 5.1.2 Selecting Date Ranges for the Report
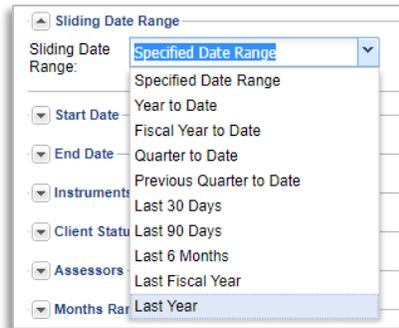
i. Alternatively, selecting 'Specified Date Range' in the Sliding Date Range parameter will allow you to adjust the 'Start Date' and 'End Date', as seen in **Figure 5.1.3**.

ii. The report will return all clients who were discharged in the time frame.

Figure 5.1.3 Selecting Specific Start and End Dates
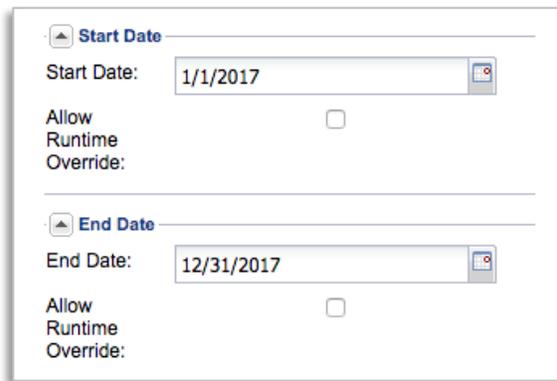
iii. Clicking on 'Allow Runtime Override' will provide more time for long reports to run without a server timeout which could cancel long reports before they finish processing.

b) Instruments

i. As shown below in **Figure 5.1.4**, the 'Instruments' allow users to select the appropriate assessment type used for the report.

Figure 5.1.4 Selecting Assessment Type

c) **Assessments Domain(s)**
  i. These are the domains of the assessment selected to produce the report on. The domains displayed will vary in each report depending on the assessment you selected in the previous parameters.
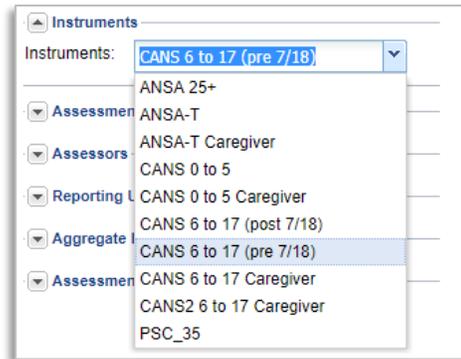 ii. Click 'Select All' if you would like to produce a report with all the domains, as seen in **Figure 5.1.5** (not recommended).
  iii. To create a report with a specific domain(s) you may click the check box next to the domain(s) desired (recommended).

Note: It is recommended that the user limit the report to 5-6 domains or fewer. More domains will cause the report to be difficult to read as the chart labels will overlap. A separate template can be created for sets of 5-6 domains.

Figure 5.1.5 Assessment Domains Selection
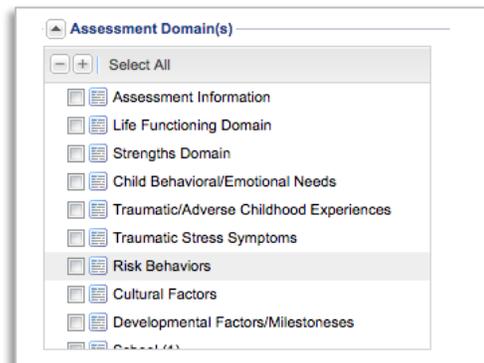
d) **From Assessment Type**
  iv. As seen in **Figure 5.1.6**., this parameter sets the primary boundary for the *Assessment Time 1* from which the report will extract information from. Different options will appear depending on the Instrument selected. Select the 'Initial Assessment' for this option.
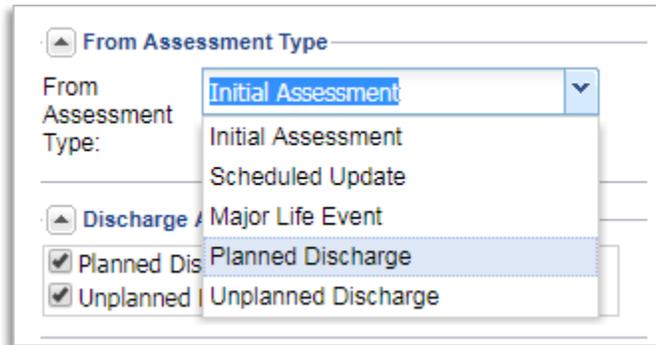
Figure 5.1.6 Selecting Assessment Type Primary Boundary

Note: When available, failing to select a parameter in this option <u>will prevent </u>the report to be saved or run. Also, if there are several scheduled updates or major life events per youth, then each youth may contribute more than one data point, sometimes and often unequally. It is recommended that these options are not selected. Also, it would not make sense to select a discharge option to compare to a discharge option. **It is recommended that the user only select the Initial Assessment here.**

e) **Discharge Assessment Type(s)**

   v. As seen in **Figure 5.1.7**, this parameter sets the secondary boundary for the *Assessment Time 2* from which the report will extract information from.

Figure 5.1.7 Discharge Assessment Type(s)
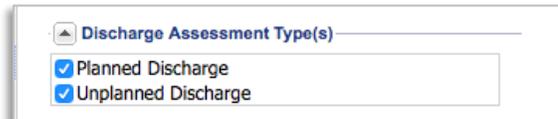
Note: After running the report, the 'To Assessment Type' parameter will be displayed as 'Discharge Reasons' in the results.

f) **Reporting Units**

   i. Select the appropriate reporting unit for the report.

Figure 5.1.9 Selecting the Reporting Units

g) **Aggregate RU**

    i. Click the check box in this section to merge data across all reporting units selected for the report. This will show the results in one final table containing all reporting units combined.
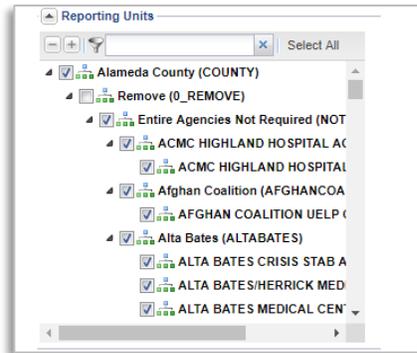
h) **Assessment Status(es)**

    i. As shown below in **Figure 5.1.7,** this parameter allows users to select one or multiple stages of assessments' status for the report. For example, the user may want to restrict the report to count treatment needs from only 'Approved' assessments.

Figure 5.1.7 Assessment Status Selection

4. Click the 'Save' button at the top of the parameters box to save the changes made.

Note: This will cause the parameters region to appear to go blank, but the changes will be saved.

5.2 Running and Interpreting Reports

Once report templates have been set up and shared with staff, staff can quickly run each report template to review results immediately or have a pdf of the results sent to their email inbox.

To Run the Report

1. Select the record from the Reports tab and then Click on the 'Run' icon at the top of the reports list, as shown in **Figure 5.2.1**, to perform one of the following functions. A drop-down menu will appear.

    a) Click on the 'Immediate' button to have the report pop up on your internet browser's next tab.

    b) Alternatively, click on the 'Delivered' to have the report sent to your email account.

Figure 5.2.1 Running a Report
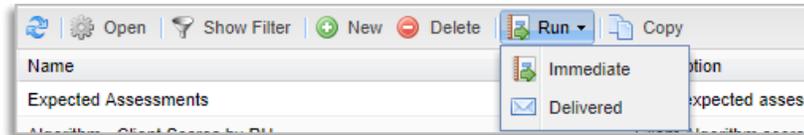
To Interpret the Report

1. The first pages of the report will display all of the Reporting Units which are represented by the data in the report. After that initial list of Reporting Units and the report will display the resulting tables for each reporting unit or for all reporting units combined if the Aggregate RU option was selected, as in the example in **Figure 5.2.2.** Some of the report parameters (Period, Instrument, Assessment Reasons, Assessment Statuses and Domains) appear prior to the first table.

Note:	It is important to note that if a set of clients had an average of 2.7 treatment needs at initial and 2.9 treatment needs at discharged, as is displayed for Life Functioning Domain under Reporting Unit #2 in the **Figure 5.2.2**, that this does not mean that all youth got worse. Some of the treatment needs from the initial could have been resolved but this report shows that more treatment needs were discovered than were resolved. For example, 10 treatment needs might have been addressed and 15 new treatment needs discovered. It is common early in an episode to discover new items as staff build trusting relationships with clients and as clients continue to share or develop their stories. It is impossible to tell from this report how many treatment needs were resolved versus how many were discovered.

Figure 5.2.2 Interpreting the Report

Life Functioning had 2.6 actionable items per youth on average at Initial and 2.2 average actionable items at discharge, for a decrease of <1 item on average per youth. This was not a statistically significant change.

Each reporting unit displays in its own table, unless "Aggregate RUs" was selected

Reporting Unit #1

Time 1 should have been selected as the Initial Assessment

Time 2 could be Planned Discharge, Unplanned Discharge or both.

The average actionable items per youth for Child Behavioral/Emotional Needs decreased from 1.7 at initial to 1.2 at discharge, and this was a statistically significant decrease (*).

Reporting Unit #2

The average actionable items per youth for the Suicide Risk Module increased from 0.3 at initial to 1.1 at discharge, and this was a statistically significant increase (*).

(*) -- indicates statistically significant move.