Program Management Reports Guide

We will focus on providing you with an opportunity to ask questions and see how to navigate the reports on the website so you can explore on your own. The most important points will be covered here. It is important that you review and become familiar with the FAQs, as many procedures and questions that you may have are included there. You can find them on the MST Institute's Help page http://www.mstinstitute.org/contact/help.shtml.

Objectives of the Demonstration:

Today, we will go over the following –

- Monitoring Caseload
  - MST Census report
  - MST Caseload report
- Monitoring Outcomes
  - Case Discharge Summary Report
- Monitoring Overall Program Performance
  - Program Review Form
  - Program Drift Monitoring Report

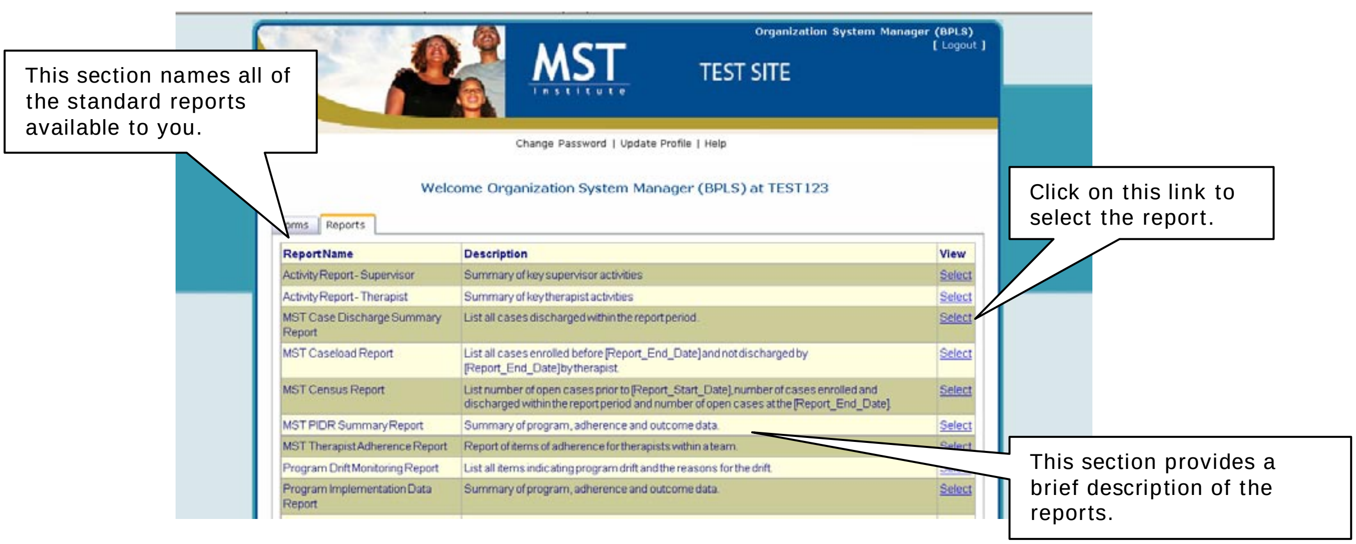
Please go to www.mstinstitute.org and click on "**Demo Web Site**". For today's training, we will log in as a System Manager and look at the menus and reports available to that user.

Log in as a Organization System Manager on the DEMO site:
https://www.msti.org/demo/Index.asp
Organization System Manager login: osm1/osm1

Please note that you can use this login information to explore the site on your own at any time.

Before we begin, please take a minute to review the standard report menu of the www.msti.org main menu page below. Standard reports are different from list reports which are summaries of raw data. Standard reports are canned/standard formats for reports providing summaries of the data of interest and are generated by choosing "Select" next to the desired item on the menu.

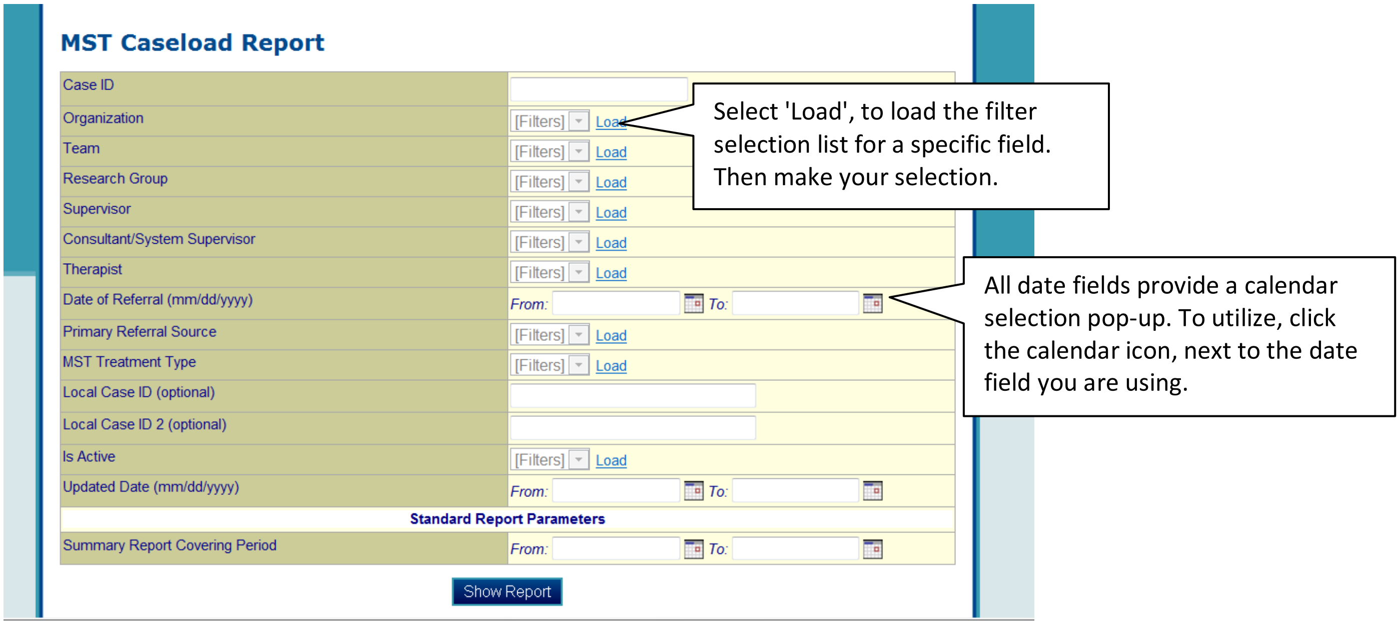
Screenshot #1:



Once a report is selected from the standard report menu, the system will always take you to the **Report Field Filters** screen. The **Report Field Filters** screen allows the user to specify the form, organization, team, research group, etc. he or she wants to report on.

Furthermore, the **Report Field Filters** screen enables the user to run a report on a certain period of time.

Screenshot #2



If there are multiple teams, supervisors, or therapists for this organization, you will need to select 'Load', in order to load the filter selection list for the specific field you want to filter by. Some of the drop down menus may only allow one or certain selections. This would reflect that there is only information in the database for these selections.

The Research Group drop down can be left with the default value of “Select a Value” unless your organization wants to be able to run a report on a certain group that has been pre-selected. Then you would select the letter from the drop down that symbolizes the particular group you want to run a report on. The Summary Report Covering Period date range at the bottom of the **Report Field Filters** screen is required to customize a report.

Monitoring Caseloads

Run the MST Census Report

To run this report:

- Click “Select” for the **MST Census Report** in the Report Menu
- On the **Report Field Filters** screen, enter the TAM-R for ID number or select the team, supervisor, or therapist of interest
- At the bottom of the **Report Field Filters** screen, enter the dates of interest in the Summary Report Covering Period fields (e.g., last consult for the begin date and date of current consult as the end date)
- Click “Show Report”

MST Census Report is useful in monitoring total program census per team according to the time period selected in the Summary Report Covering Period fields. The Census Report lists the number of open cases prior to start date given, number of cases enrolled and discharged within the report period and number of open cases at the end date given.

The most common use for this report is to provide program administrators an easy way to report program utilization to their stakeholders. They can select the report period needed to generate reports of annual (or quarterly) service utilization per team.

Run the MST Caseload Report

To run this report:

- Click on **MST Caseload Report** in the Standard Report Menu
- On the **Select Records** screen, select the team or supervisor of interest
- At the bottom of the **Select Records** screen, enter the dates of interest in the Summary Report Covering Period fields
- Click “Continue”

The **MST Caseload Report** lists the current cases assigned to each therapist with date of referral, first visit date, length of treatment, and whether or not a case is Active. It is suggested that the report period selected should be the past week up to the current date as this report is helpful in monitoring current caseloads and in anticipating upcoming case openings as cases move towards their upper end of target treatment duration. This report includes only the youth who are currently enrolled and not yet discharged at the end of the designated reporting period. Clicking on the Case ID will bring up the enrollment form.

The **MST Caseload Report** should be run as frequently as needed for monitoring although it is recommended that this report be reviewed with the teams’ weekly paperwork. If the data have been entered accurately, there should be a case on the report that corresponds to each weekly summary. Questions to ask include:

- Does list include all current open cases?
- Are therapist assignments accurate?
- Are there cases that need to start planning for closure?
- Are there cases already closed that need a discharge form completed?

By monitoring this report weekly, teams will begin to develop the habit of keeping case information up to date. Other case information that can quickly be monitored is the caseload size for each therapist and how long each case has been in treatment.

If there is initial paperwork on a case that does not appear on the report, the team should enter the case enrollment form for that case. If a case appears on the report that was already closed, then the case discharge form has not been completed. Sometimes, a case will be made "inactive" but someone forget to complete the discharge form. Also printed on the report are the names of the team and therapist associated with each case. If these are incorrect, the Case Enrollment form should be edited.

Duplicate cases can be identified when a case appears more than once on the report (one name would have been spelled differently). In this case, the team will need to identify which case is correct and email the webmaster at msti@mstinstitute.org to have the duplicate case removed.

Monitoring Outcomes

Run the MST Case Discharge Summary Report

To run this report:

- Click "Select" for the **MST Case Discharge Summary** in the Report Menu
- On the **Report Field Filters** screen, enter the TAM-R for ID number or select the team, supervisor, or therapist of interest
- At the bottom of the **Report Field Filters** screen, enter the dates of interest in the Summary Report Covering Period fields
- Click "Show Report"

The **Case Discharge Summary Report** lists all the data from the discharge form for all cases discharged within the report period including relevant dates, length of treatment, case progress review, instrumental outcomes, and ultimate outcomes. It provides an overview of outcome data across families, sorted by therapist. Teams should verify accurate data entry by running this report monthly and comparing it to hard copies of the discharge form. A discharge form can be easily accessed for editing by clicking on the number in left column.

It is critical that the information on the case discharge form reflect a consensus decision between the therapist, supervisor and the MST expert. Therefore, procedures should be established and followed routinely. Each case is evaluated at discharge in three areas:

- Did the youth and family complete treatment and, if not, why not (Case progress review)?
- Were there sufficient changes in the key factors associated with problem behaviors to indicate that changes are likely to be maintained post discharge (Instrumental Outcomes)?
- How was the youth doing in three areas of primary interest to most stakeholders (Ultimate Outcomes)?

The Ultimate Outcome items provide basic information about how the youth is functioning at the time of discharge. The meaning of the terms (e.g., 'arrests') may vary from county to county, state to state, and country to country; therefore, it is difficult for the MST Institute to establish a "one-size-fits-all" definition. The operational definition of each of the Ultimate Outcomes should be made clear for each MST program and documented in the Goals and Guidelines document.

Monitoring Overall Program Adherence

Add a Program Review Form

To add this form:

- Click on “Add” for **Program Review Form**
- Select a team in the **Select a Team** drop down menu for the team that you want to add the form to and click “Select”.

The **Program Review Form** is used for entering, editing, and listing of program practices and characteristics. It includes potential factors that indicate drift or risk to program sustainability. The compilation of these forms inform the **Program Drift Monitoring Report** and the **Program Implementation Data Report.** The **Program Review Form** should be completed following every booster, either by the MST Supervisor or the MST expert. The answers should be reviewed by both and revised if necessary. While it is recommended that the status of the program be reviewed quarterly using the program review form, the “need” areas indicated on this form are still only addressed twice a year in the standard Program Implementation Report (PIR). This written report is prepared by the MST Supervisor and the MST expert to provide guidance to local stakeholders on recommended next steps to increase adherence. Typically, the Consultant / System Supervisor conducts a “fit” of the identified struggles and challenges and Intermediary Goals / Interventions will be developed to address the primary drivers. Progress on these Goals will be assessed at the time of the next PIR.

The Program Review Form has separate sections for strongly recommended/required program practices and characteristics (items 1- 18), additional recommended program practices and characteristics (items 19 - 26), and factors that have been identified as potential indicators of future or on-going challenges to program adherence and successful implementation (items 27- 38). For each item where a practice is not met or a potential challenge is identified, users are given an opportunity to insert the reason in the blank field provided.

To view a list of all of the **Program Review Forms** for an entire organization or a particular team, run a list report.

List Program Review Forms

To run this report:

- Click “View/Edit” for **Program Review Form**
- Click on the column header that you wish to sort by.
- Click on "Add a Filter" if you wish to filter your results by a certain field

For a copy of all the responses to items on the **Program Review Form**, run a list report then click on the number in the left column of the form of interest. However, to have a report that highlights only those areas that may require intervention, run a **Program Drift Monitoring Report**.

Run Program Drift Monitoring Report:

To run this report:

- Click “Select” for the **Program Drift Monitoring Report** in the Report Menu
- On the **Report Field Filters** screen, select the team of interest
- At the bottom of the **Report Field Filters** screen, enter the dates of interest in the Summary Report Covering Period fields
- Click “Show Report”

The **Program Drift Monitoring Report** is based on the **Program Review Form** that lists the same required and recommended program practices and characteristics that have been identified through the clinical trails and implementation of MST. Ongoing research and experience with dissemination efforts in a wide range of communities have suggested that these items can serve as an “early warning signal.” To have a report that highlights only those areas that may require intervention, run the **Program Drift Monitoring Report**. This report will summarize areas of “drift” that appear on any Program Review Form completed during the Summary Report Covering Period.

Other Report Options

Additional reports are available to monitor a program’s overall performance, a description of these reports is provided in the <u>Program Performance Reports Guide</u> available at http://www.mstinstitute.org/services/training.shtml.