

Program Performance 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 MST Institute's Help page <http://www.mstinstitute.org/contact/help.shtml>.

Objectives of the Demonstration:

Today, we will go over the following –

- Monitoring Overall Program Performance
 - Program Implementation Data Report
 - MST PIDR Summary Report
 - MST Dashboard 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:

ReportName	Description	View
Activity Report- Supervisor	Summary of key supervisor activities	Select
Activity Report- Therapist	Summary of key therapist activities	Select
MST Case Discharge Summary Report	List all cases discharged within the report period	Select
MST Caseload Report	List all cases enrolled before [Report_End_Date] and not discharged by [Report_End_Date] by therapist	Select
MST Census Report	List number of open cases prior to [Report_Start_Date], number of cases enrolled and discharged within the report period and number of open cases at the [Report_End_Date]	Select
MST PIDR Summary Report	Summary of program, adherence and outcome data	Select
MST Therapist Adherence Report	Report of items of adherence for therapists within a team	Select
Program Drift Monitoring Report	List all items indicating program drift and the reasons for the drift	Select
Program Implementation Data Report	Summary of program, adherence and outcome data	Select

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

The screenshot shows the 'MST Caseload Report' form. It contains several filter fields, each with a '[Filters]' dropdown and a 'Load' button. A callout box points to the 'Load' button for the 'Organization' field, stating: 'Select 'Load', to load the filter selection list for a specific field. Then make your selection.' Another callout box points to the calendar icons next to the 'From' and 'To' date fields for 'Date of Referral', stating: 'All date fields provide a calendar selection pop-up. To utilize, click the calendar icon, next to the date field you are using.' Below the filter fields is a section titled 'Standard Report Parameters' with a 'Summary Report Covering Period' field, also featuring 'From' and 'To' date fields with calendar icons. A 'Show Report' button is located at the bottom of the form.

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 Overall Program Adherence

The reports used to monitor overall program adherence and performance combine information that is available separately in a variety of other forms and reports. Therefore, it might be helpful to first review the reports described in the [Program Management Reports Guide](#) before using the reports included here. The reports reviewed here are based on data collected via the Case Forms, the Therapist and Supervisor Adherence Measures, and the Program Review Form.

Run Program Implementation Data Report:

To run this report:

- Click "Select" for the **Program Implementation Data Report** in the Report Menu
- On the **Report Field Filters** screen, select the filters of interest, e.g., team, supervisor, or therapist
- At the bottom of the **Report Field Filters** screen, enter the dates of interest in the Summary Report Covering Period fields
- Click "Show Report"
- Click on "Display Program Review" to see data from the Program Review Form
- Click on "Display Program Data" to see the data summary table

Required program practices and characteristics	# Teams Met
1. MST Therapists are full-time employees assigned to the MST program solely. • test: jhfkfkkyhcv	2 of 3
2. MST Therapists do not have any non-MST program responsibilities in the agency, do not carry any additional non-MST cases, and do not have other part-time jobs outside of the agency. • Team 2 CSSD: blaa	1 of 3
3. MST staff are allowed to work a flexible schedule as needed to meet the needs of the families they are serving. • test: gfythuyyvj	2 of 3
4. MST staff are allowed to use their personal vehicles to transport clients. • Team 2 CSSD: blaa	2 of 3
5. MST staff have use of either cellular phones or pagers so that clients can contact them.	3 of 3

The **Program Implementation Data Report (PIDR)** summaries key information about program practices (e.g. length of treatment, caseload size,) therapist adherence, and discharge information about the program in a data table. This report is critical in identifying areas of strength and struggle (e.g., challenges in the referral process, low adherence, etc) for the program. If data have been routinely monitored for accuracy, then this report should provide a valid "picture" of the program and should be reviewed with Consultant /System Supervisor around the time of each booster. In addition, the Program Implementation Review (PIR) uses this report to identify issues to target for continuous improvement of the MST program. The report exported to Excel can easily be copied and pasted into a Word document with 1" margins.

A new element to this report in the EW2 revision is that this new PIDR version is one report that includes all data needed and properly formatted for the PIR. Items that MSTI considers to be a lower priority are at the end of the report to allow MST Experts to delete rows 30 – 44 for the PIR if not needed for stakeholders. Furthermore, there is a new Program Practices section, three new SAM indicators have been added and some non-essential rows have been removed.

The new Program Practices and Characteristics section displays information on the most recent Program Review Form for each team that has a “covered period end date” within the reporting period. For each of the following categories of items a count of teams is displayed:

- Status of each required program practice and characteristic
- Additional recommended program practices of note that are not met
- Factors identified as potential indicators of future or on-going challenges to program adherence and successful implementation that are present

The Program Data Table is divided into sections as follows;

➤ ***Program Data***

The first 5 items of the PIDR summarizes information about program operations. The “Total FTE for active therapists” figure is based on the summary of the full time equivalent for each MST staff instead of a count of the actual persons. This allows for a more accurate calculation of open cases per therapist (item #3) when staff are carrying less than a full caseload (e.g., supervisors who carry cases). Supervisors can edit the Therapist FTE if there are changes in status, for example, a therapist is new and only has one case assigned during the report period. The therapist FTE can be changed to 1/5 (20) to more accurately reflect capacity. The calculation only includes therapists with at least one open case during the report period.

The “Current Census (open case)” figure calculates those cases with a Date of First Visit before the end of the report period who are not discharged. The “Average number of open cases per therapist” figure is calculated by first counting the number of treatment days per case during the report period, then creating a total number of treatment days, this is then divided by the total number of days in the report period (i.e., creating an estimate of number of cases served at any point in time during the report period). This proportional estimate of cases served is then divided by the total FTE in #1.

The “Cases served during the report period” figure reflects the total count of cases served with a date of first visit within the report period. Each case is counted even if they were only open a few days in the report period. The “Estimated annual service capacity” is calculated by taking the “Current Census” figure, multiplying it by 365 (days) and dividing it by the average length of stay in days for closed cases (item #26.)

➤ ***Therapist and Supervisor Adherence Scores***

The Therapist and Supervisor Adherence Scores section (items 6 - 14) on the PIDR provides information related to the collection of therapist and supervisor measures and key indicators of therapist adherence. Items 6 – 8 give the user the total number of TAM-R forms collected, the total number of incomplete TAM-R forms collected in the report period, and the percent TAM-R due that were completed for

the selected organization or team. This latter item should be consistent with the "Percent completions" reported in the TAM-R Monitor Report for the same report period using the same data filters.

The key therapist adherence indicators include the "Percent of youth with at least one TAM-R interview" (#9), the "Overall Average Adherence Score" (#10) and the "Percent of youth with average therapist adherence score above threshold" (#11) in the report period for the selected organization or team. It is important to note that #9 is calculated by dividing the number of youth with a TAM-R by the number of cases served, while #11 is based on the number of youth with a TAM-R.

The new Supervisor Adherence Scores items include the total number of SAM forms collected, the average number of SAMs collected per therapist, and the percent of SAM factor scores in high average range.

➤ ***Case Progress Review***

The Case Progress Review section (items 15 - 24) on the PIDR gives the user a summary of the discharge data collected in the report period. This section gives the total number of cases discharged excluding those cases without a date of first visit and also gives the number of referrals closed without services which are those cases closed without a date of first visit (#16). The "Percent of cases completing treatment" (#17) is calculated by taking the percentage of those cases closed by mutual agreement (#18) out of those cases where the team had the opportunity to provide a full course of treatment (Case Progress Review categories #18, #19, and #20). The remaining Case Progress Review categories (i.e., client moved or was withdrawn by the referral source for reasons outside the control of the team) allow the team to track potential problems in the referral process. This section (items 18 - 24) describes the reason each case was closed.

➤ ***Ultimate and Instrumental Outcomes***

The outcome information reported in the first 2 sections is for the cases that had the opportunity to have a full course of treatment. Cases closed for non-clinical reasons (lines 21 - 24) are omitted from the counts.

The first section reports the total number of cases with opportunity for full course of treatment during the report period and the average length of stay in days (days between first visit date and discharge date) for youth. In addition, the percent of youth who are doing well in three areas of primary interest to stakeholders is provided. These areas include:

- Is the youth living at home?
- Is the youth in school/working?
- Is the youth with no new arrests?

The next section (items 30- 35) of the report contains the percent of cases closed in the report period that are evaluated at discharge as having sufficient changes in the key factors associated with problem behaviors to indicate that changes are likely to be maintained post discharge.

The final two sections (items 36 - 44) of the report include the same Ultimate and Instrumental outcome information but the percentages are based on all cases closed during the report period, regardless of the reason for case closure.

Finally, there is also now the ability to export reports to Adobe, and/or Excel. Users can print from the exported file. In addition, to include this report in a Word document, first

open a blank Word document and ensure that it is in portrait orientation with 1" margins all around. Then export the report to Excel and copy/paste it into the Word document.

MST PIDR Summary Report

To run this report:

- Click "Select" for the **MST PIDR Summary Report** in the Report Menu
- On the **Report Field Filters** screen, select up to five different teams 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" and the screen below will appear
- Click on the display links to view the data tables

The report allows the user to select up to five different teams to query, so as to compare the adherence of those five teams using those same items found on the **Program Implementation Data Report** (PIDR). Furthermore, the report displays the averages or totals of the five teams selected for each of those items. This report will include all records for a team since there are no filters for supervisor or MST Expert.

MST PIDR Summary Report

Report Period: 1/1/2006 - 1/1/2009

Filters: TEST123 - Jan2
TEST123 - Dashboard Test
TEST123 - Team 1 BASE test

No Program Reviews were found within the current report period.

No.	Item	Target	Team Avg	TEST123 - Jan2	TEST123 - Dashboard Test	TEST123 - Team 1 BASE test
Program Data						
1	Total FTE for active therapists*	2.4	0.3	0.00	1.00	0.00
2	Current Census (open case) at the end of the report period		1.3	0	4	0
3	Average number of cases per therapist	4-6	0.7	0.00	2.06	0.00
4	Cases served during the report period		1.3	0	4	0
5	Estimated annual service capacity (#3x#1)x365/#25)		0.0	0.00	0.00	0.00
<small>*Note: Calculated by summing FTE for any therapist who has at least one case with a First Visit Date no later than the report end date and not discharged before the report end date / 100.</small>						

Run Dashboard Report:

To run this report:

- Click "Select" for the **Dashboard Report** in the Report Menu
- On the **Report Field Filters** screen, select the filters of interest, e.g., team, supervisor, or therapist
- 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 report can be restricted to standard MST or to MST adaptations. Additional filters can be added or removed as needed.

The new MST Dashboard Report allows the monitoring of overall performance "at a glance". Color alerts let users know what needs to be paid attention to and monitored closely. The Dashboard Report can be run by Organization or Network only. The top section displays key performance indicators by team for the report period. Only teams with data during the report period will be displayed. These selections for the MST Dashboard Report are limited to a few key variables where MSTI has established empirical support for the ranges used to identify scores in the green (within target), yellow (potential concern) or red (identified need area) ranges.

By clicking "Display Summary", performance over previous time periods of same duration can be displayed. Data will be summarized for any team with data during the period, therefore, the time period might include different sets of teams. Users should be aware that it is critical to only pay attention to percentages based on a minimum of 15 records. Clicking on the indicator in summary table will produce a color chart in a new window. The ranges for red and green are defined with yellow being between the colored lines.