



# Ohio Mental Health Consumer Outcomes System

## Instructions for Installing the Reports Generator Version 4.0

### (Updated January 2007)

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The Reports Generator was designed to augment the ODMH Data Entry & Reports Template. In particular, it was developed to...

- Save support staff time by allowing individual reports to be run in batch mode
- Save paper by providing brief reports (usually one page)
- Provide reports that are unavailable in the Template (aggregate reports, initial Ohio Scales Treatment Planning Report)

Updates made to version 4.0 of the Reports Generator include:

- Addition of the following Reports:
  - Achieving Recovery & Resiliency the Outcomes Way (ARROW) Report
  - Within-Subjects Adult Consumer Aggregate Scale Report
  - Within-Subjects Adult Provider Aggregate Scale Report
  - Within-Subjects Youth Aggregate Scale Report
  - Within-Subjects Parent Aggregate Scale Report
  - Within-Subjects Worker Aggregate Scale Report
- Revised and updated Tickler report based on admission data and with three-month interval for Kid's Reports.

**The Reports Generator is designed for use with Access 2000 or more recent versions only.** Staff with experience using Access 2000 should be able to follow the installation instructions. Before installing the Reports Generator, we recommend that staff make a copy of the Template. Contact the ODMH Outcomes Support Team ([outcome@mh.state.oh.us](mailto:outcome@mh.state.oh.us)) if you have any comments, questions, or problems.

#### **Important Note:**

If you do not use the medrec (adult data) and agid (kids data) fields to track clients, you cannot use the report generator. These are the key fields that are used to match up records for the reports. If you want, you can copy the UCI to the agid and medrec fields to use the report generator.

#### **Downloading the Reports Generator**

1. Download the Reports Generator (**clinadminrep4dot0.zip**) from the Outcomes Web site by clicking the Reports Generator link.
2. Click the "Save this File to Disk" option.
3. Designate the directory in which you want to store the zipped version of the Reports Generator and click "Save".

#### **Unzipping the Reports Generator**

1. The Reports Generator must be unzipped before it can be used with the Template. Go to the directory in which the Reports Generator was saved and double-click the Reports Generator icon.
2. In the window that appears, click once on the Reports Generator file (**clinadminrep4dot0.mdb**).
3. Click "Extract" and select the directory in which you want to save the unzipped version of the Reports Generator.
4. Click the Extract button. An unzipped version of the Reports Generator is now stored in the designated location.

#### **Linking the Reports Generator to the Template**

1. Double-click the Reports Generator icon (**clinadminrep4dot0.mdb**).
2. On the Tools menu, found on the top of the screen, click "Database Utilities".
3. Click the "Linked Table Manager".

4. Select both AdultForm and KidForm by clicking the boxes on the left of the Linked Table Manager window.
5. Click the “Always Prompt for New Location” box at the bottom of the Linked Table Manager Window.
6. Click “OK” and a window will appear that ask you to find the location of the Template.
7. Find and highlight the Template and select “OK”.
8. A window will appear that says, “All selected linked tables were successfully refreshed”, select OK.
9. Click “Close” on the Linked Manager Table and exit the Reports Generator.

ATTENTION: Be sure you have the most recent (Release date is December, 2006) Data Entry and Reports Template installed prior to this step. If you get a message saying something to the effect that the “reprundate” field is not found, you probably have the wrong version of the Template.

### **Report Setup for Individual Reports**

1. Select “Setup” from the main menu.
2. Choose “Select Individual Reports”. This will bring up a form that lists the available individual reports. Placing a check mark in the box next to the report selects that report. By default, reports are opened in preview mode. Placing a check mark in the second box will direct the report to print automatically.

### **Available Individual Reports**

- **Adult Consumer Report** – Summarizes scores on Adult Consumer Form over multiple administrations. This report includes records for the current episode only, not all of the records for a consumer. “Episode” is indicated by the admissdt (admission date) field. The medrec field is used to match records for this report and is called the “Medical Record Number” on the “Header” section of the data entry screens inside the ODMH Data Entry Template. *If you do not use the medrec field, you will not be able to generate this report.*
- **Adult Combined Report** - Contains all of the scale scores and many individual items from the Adult Consumer measure combined with the Functioning Assessment Scale and a summary of information about the negative events that may have happened to the consumer from the Adult Provider instrument. This report includes records for the current episode only, not all of the records for a consumer. “Episode” is indicated by the admissdt (admission date) field. The medrec field is used to match records for this report and is called the “Medical Record Number” on the “Header” section of the data entry screens inside the ODMH Data entry template. *If you do not use the medrec field, you will not be able to generate this report.*
- **ARROW (Achieving Recovery and Resiliency the Outcomes Way) Report** – This report is designed to be used in treatment planning, and suggests potential activities for consumer's treatment and/or recovery plan. The ARROW is based on Maslow's hierarchy of needs and consumer's responses to Adult Consumer instrument. The activities can reduce agency burden by calling on non-agency resources More information about the ARROW report is at: [www.MHRecovery.com](http://www.MHRecovery.com). The report is designed to be run for Initials only. The medrec field is used in this report and is called the “Medical Record Number” on the “Header” section of the data entry screens inside the ODMH Data entry template. *If you do not use the medrec field, you may not be able to generate this report.*
- **Youth, Parent, Worker Combined Report** - 3 Month Schedule – Summarizes the subscale scores on all three Ohio Scales instruments over multiple administrations. Used for reporting when data are collected every three months. This report uses the AGTEXT field as a program name to sort cases. Cases are sorted into program based on the most recent program entered. This report includes records for the current episode only, not all of the records for a consumer. “Episode” is indicated by the admissdt (admission date) field. The agid field is used to match records for this report, and is called the “Agency ID#” on the “Header” section of the data entry screens inside the ODMH Data entry template. *If you do not use the agid field, you will not be able to generate this report.*

- **Youth, Parent, Worker Combined Report** - Initial-6 Month-Annual Schedule – Summarizes the subscale scores on all three Ohio Scales instruments over multiple administrations. Used for reporting when data are collected according to Ohio Outcomes System schedule. This report includes the AGTEXT field as a program name, but does not use it for sorting. This report includes records for the current episode only, not all of the records for a consumer. “Episode” is indicated by the admisdt (admission date) field. The agid field is used to match records for this report, and is called the “Agency ID#” on the “Header” section of the data entry screens inside the ODMH Data entry template. *If you do not use the agid field, you will not be able to generate this report.*
- **Worker Treatment Planning Report**- Designed to help providers complete the initial Ohio Scales worker instrument, this reports summarizes the Youth and Parent’s initial Ohio Scales data in a report designed by Ben Ogles. Use of the report is described in detail in the “Using Youth Consumer Outcomes to Support Treatment Planning Manual”, written by Dr. Benjamin Ogles. The report is run only on initial administrations. The agid field is used to match records for this report, and is called the “Agency ID#” on the “Header” section of the data entry screens inside the ODMH Data entry template. *If you do not use the agid field, you will not be able to generate this report.*

### Aggregate Adult Reporting Options

- **Adult Consumer and Provider for Agency** – Summarizes Adult Consumer Form and Adult Provider Form A subscale scores for all adult clients in the database over multiple administrations. Cross-sectional.
- **Adult Consumer and Provider By Program** – Summarizes Adult Consumer Form and Adult Provider Form subscale scores for all adult clients in the database over multiple administrations by program, where ‘agtext’ is treated as the ‘program’ field. Cross-sectional.
- **Diagnosis By Staff Adult Consumer and Provider Aggregate** - Compares average scores on the Adult A Consumer and Provider A reports by diagnosis and by staff member. It shows how different staff members are doing in treating consumers with different diagnoses. *Caveat: these are not risk adjusted scores, and many factors weigh in on how an clinician will do with their caseload, including caseload size, severity of caseload, other client characteristics, to mention a few. If you do see differences between staff, it’s a starting place.* This is cross-sectional across clients.
- **Diagnosis Adult Consumer and Provider Aggregate**– This is a companion to the Diagnosis By Staff Adult A Consumer and Provider Aggregate report, but can be used alone to compare how people with different primary diagnoses are doing on average over time. This is a cross-sectional report.
- **Adult Consumer B for Agency** - Aggregate Report for Agency Adult B Consumers – Summarizes Adult Consumer Form B and Provider B subscale scores for all adult clients in the database over multiple administrations. Cross-sectional.
- **Adult Consumer Longitudinal Report** – reports the mean scores on the Adult Consumer instrument scales at two user-selected time points, as well as calculating the number and percentage of cases reliably improved, staying the same, and reliably deteriorating. The user needs to select the starting (e.g. “Initial”) and ending (e.g. “Termination” or “Six months”) time periods, as well as start and end dates. All starting administrations are selected for the report that have a date between the start and end dates. These parameters are set under the “Set Longitudinal Options” under the “Adult Aggregate Reports” menu.
- **Adult Provider Longitudinal Report** – reports the mean scores on the Adult Provider Community Functioning scale at two user-selected time points, as well as calculating the number and percentage of cases reliably improved, staying the same, and reliably deteriorating. The user needs to select the starting (e.g. “Initial”) and ending (e.g. “Termination” or “Six months”) time periods, as well as start and end dates. All starting administrations are selected for the report that have a date between the start and end dates. These parameters are set under the “Set Longitudinal Options” under the “Adult Aggregate Reports” menu.

## Aggregate Youth Reports

- **Ohio Scales Agency** - Agency-Wide Aggregate Report for Youth, Parent, and Worker forms - Summarizes the subscale scores for all three Ohio Scales instruments for all youth clients in the database. Groups all youth by administration period. Cross-sectional.
- **Ohio Scales by Program** – Program-Wide Aggregate Report for Agency Youth, Parent, and Worker forms - Summarizes the subscale scores for all three Ohio Scales instruments for all youth clients in the database. Groups all youth by administration period and the Agency Defined Text Field (agtext), which is treated as the 'program' field. Cross-sectional.
- **Ohio Scales By Diagnosis By Staff** – Compares average scores on the Ohio Scales by diagnosis and by staff member. It shows how different staff members are doing in treating consumers with different diagnoses. *Caveat: these are not risk adjusted scores, and many factors weigh in on how an clinician will do with their caseload, including caseload size, severity of caseload, other client characteristics, to mention a few. If you do see differences between staff, it's a starting place.* This is cross-sectional across clients.
- **Ohio Scales By Diagnosis** – This is a companion to Ohio Scales By Diagnosis By Staff report, but can be used alone to compare how people with different primary diagnoses are doing on average over time. This is a cross-sectional report.
- **Cost of Out of Home Placements (ROLES) Restrictiveness Of Living Environment Scale** -This report multiplies the days spent in each residential setting by a Per Diem rate to show how total placement cost changes. The Per Diem cost table comes from a recent review of costs in Ohio conducted by staff of the Center for Innovative Practices. This should be updated periodically. This is a cross-sectional report.
- **Youth Ohio Scales Longitudinal Report** – reports the mean scores on the Youth Ohio Scales at two user-selected time points, as well as calculating the number and percentage of cases reliably improved, staying the same, and reliably deteriorating. Additionally, the number of Youth who are at Clinical Level at the starting period and number of Youth that experience Reliable and Significant change are also reported. The user needs to select the starting (e.g. "Initial") and ending (e.g. "Termination" or "Six months") time periods, as well as start and end dates. All starting administrations are selected for the report that have a date between the start and end dates. These parameters are set under the "Set Longitudinal Options" under the "Youth Aggregate Reports" menu.
- **Parent Ohio Scales Longitudinal Report** – reports the mean scores on the Parent Ohio Scales at two user-selected time points, as well as calculating the number and percentage of cases reliably improved, staying the same, and reliably deteriorating. Additionally, the number of Parents who are at Clinical Level at the starting period and number of Parents that experience Reliable and Significant change are also reported. The user needs to select the starting (e.g. "Initial") and ending (e.g. "Termination" or "Six months") time periods, as well as start and end dates. All starting administrations are selected for the report that have a date between the start and end dates. These parameters are set under the "Set Longitudinal Options" under the "Youth Aggregate Reports" menu.
- **Worker Ohio Scales Longitudinal Report** – reports the mean scores on the Worker Ohio Scales at two user-selected time points, as well as calculating the number and percentage of cases reliably improved, staying the same, and reliably deteriorating. Additionally, the number of Workers who are at Clinical Level at the starting period and number of Workers that experience Reliable and Significant change are also reported. The user needs to select the starting (e.g. "Initial") and ending (e.g. "Termination" or "Six months") time periods, as well as start and end dates. All starting administrations are selected for the report that have a date between the start and end dates. These parameters are set under the "Set Longitudinal Options" under the "Youth Aggregate Reports" menu.

## Tracking Report for all Consumers

- **Tracking Report** – This report can be used to see which consumers have an upcoming administration between the start date and end date entered in the parameter field.

### Notes on All Aggregate Cross-Sectional Reports

- All aggregate reports are cross-sectional rather than within subject.
- The administration time period used in the reports is calculated by subtracting the admission date from the administration date.
- Aggregate reports use all applicable data in the database regardless of time.
- The number of consumers, parents, or providers that are listed are for records included, not specific to individual fields, so the N for some fields may be lower.

### Report Generator Notes

The wording on some of the reports may not print correctly. If the text on the report wraps or truncates, the report will need to be modified. The report can be modified several ways. One way to adjust the reports is to:

1. Open the report in Design View.
2. Select the text to be modified.
3. Adjust the text or font size until the entire variable label can be read on the report.
4. The page set up may need to be reset to Landscape and .5 inch margins on all sides.

### Running reports on Private Consumers

This capacity is not built into the Reports Generator. However, there is a way to run reports for private pay consumers

- 1: make a copy of the reports generator
- 2: rename it (call it RepgenPriv)
- 3: open the RepGenPriv database and go to the Table view
- 4: be sure the tables are linked properly
- 5: delete the Adultform and Kidform linked tables
- 6: rename the AdultformV and KidformV linked tables to Adultform and Kidform respectively

That's it. All of the queries and reports are built off the Adultform and Kidform tables, so its pretty easy to trick the system to treat the private tables as public tables. You just have to remember that the links are to the private tables any time you need to relink the tables.

### Running Reports that Include Both Public and Private Data

If you want both private and public tables in the same aggregate report, then:

0: Do the steps under "Running reports on Private Consumers"

- 1: create ANOTHER copy of the reports generator
- 2: rename it (lets call this one RepGenAgg)
- 3: link to the data tables in your two separate databases; after you link to the tables you need to rename them to anything but Adultform and Kidform; I suggest AdultformPub and KidformPub for the public tables, and AdultformPriv and KidformPriv for the private tables

The point of these next steps is to create two tables with all of the private and public data in them that are named Adultform and Kidform

- 4: go to the query tab and start a new query in design; let's start with AdultformPub data; select AdultFormPub from the table selection box and close it.
- 5: double-click on the asterisk (\*) at the top of the "adultformPubd" table icon; done properly, this selects all of the fields,
- 6: from the query menu, select Make Table Query; enter Adultform as the table name
- 7: save the table with some clever name; run it (this will create a new table), close it
- 8: create another query, select AdultformPriv, add all of the fields to the query
- 9: select Append Query from the Query menu; select Adultform (the table you just created) from the pulldown menu
- 10: repeat 4-9 for the kids tables