The ODMH Data Entry & Reports Template

User's Guide

ODMH Outcomes Support Team
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Introduction

Welcome to the Data Entry and Reports Template User's Guide! This User's Guide is intended to provide helpful information regarding the installation and use of the Template. It is divided into several sections, starting with downloading and installing the Template and explaining how to navigate through the Template. The next section of the manual explains how to enter Outcomes data, how to search and modify existing records in the Template, how to generate reports, and how to export Outcomes files. You may refer to the different sections of this guide as needed. However, new users are encouraged to read each section in order.

Keep in mind that the Template was intended to be a basic tool--a starting point from which agencies can develop their own Outcomes databases to meet information needs specific to their local systems. As a result, agencies may find that the Template is somewhat limited in its ability to perform more advanced functions, especially with regard to tracking Outcomes administrations and generating reports from Outcomes data. We encourage local systems to modify and expand the Template to meet their needs and to share their work with other local systems across Ohio.

Template Overview

The data entry and reports "template" was developed to provide an example of how technology can be used at the agency/provider level to support Outcomes data collection, storage, reporting, and transmission. This tool, a standard Microsoft® Access 2000 application, is designed to serve three basic functions:

Data Entry and Editing: The Template allows provider agencies to enter and edit data contained in the Outcomes instruments. It has built-in data validation checks to reduce data entry errors and to help to ensure overall data quality. Data entered using the Template are automatically formatted to comply with the specifications required by ODMH.

Outcomes Data Storage and Exporting: The Template can be used to store Outcomes data in a database structured to meet the specifications required by ODMH. It also includes an export function that can be used to create a properly formatted Outcomes file that, in turn, can be submitted to a board and, ultimately, the statewide Outcomes database at ODMH. Agency/provider organizations that choose to collect Outcomes data using a method other than the Template (e.g., scanning, voice recognition) can "dump" their data into the tables of the Template, thereby making the export and reporting functionality available.

Outcomes Reporting: The Template can also be used to produce several basic, consumer-based care management reports for all Outcomes System instruments except the CAFAS and PECFAS. It extracts information from the database and prepares an individualized report of a consumer's responses to items on each instrument.

Scoring: The Data Entry and Reports Template will automatically reverse score the correct items found in the Adult Consumer instruments. If an agency is not using the Data Entry and Reports Template as their data flow technology, they need to reverse score these items. More information about which items are reverse scored can be found in the Outcomes Procedural Manual.

Downloading, Installing & Logging On

1. Minimum system requirements

Hardware

- Computer with 486 or higher processor
- 8 Megabytes of RAM (16 Megabytes recommended)
- Hard disk with at least 20 megabytes of available space
- Monitor supporting display of at least 800x600 (1024 x 768 recommended)
- CD-ROM Drive

Software

- Windows 95, 98, 2000, or ME
- Microsoft Access 2000
- A version of current zip software (WinZip or PKZip)

2. Downloading the Template

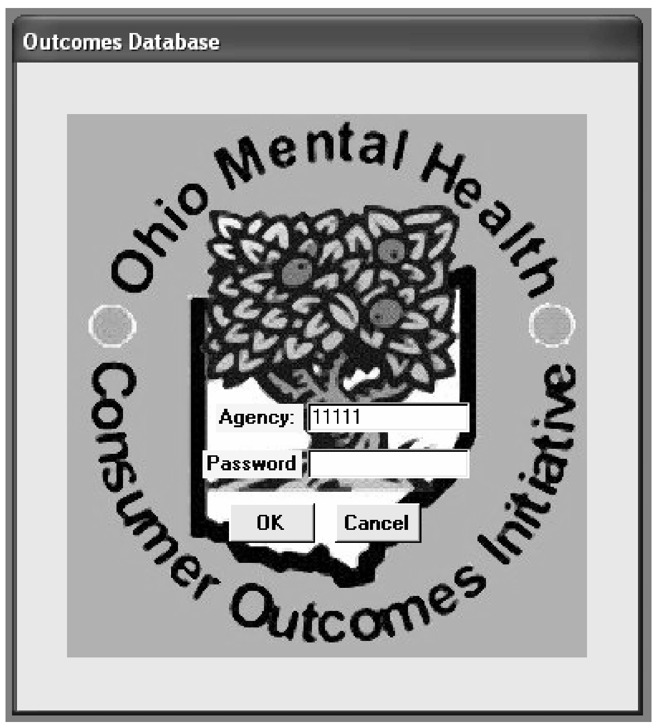
- Verify which version of Access is installed on the computer that will run the Template.
- Go to the Data Flow section of the Outcomes Web site at http://www.mh.state.oh.us/oper/outcomes/data.flow.index.html NOTE: Click the link corresponding to the version of Access (2000) installed on your computer.
- A dialog box will appear. Choose the "Save this File to Disk" option.
- You will then be asked to designate a location (file folder) where a zipped (compressed) version of the Template will be stored.
- Click "Save" and the zipped Template file will be stored in the designated location.

3. Installing the Template

- The Template must be unzipped before it can be used. A version of zip software (e.g., WinZip, PKZip) must be installed on your computer to unzip the Template.
- Double-click the Template icon to open the file and click once on the Template filename.
- Click the Extract button and designate the location (file folder) where the Template will be stored.
- Once a location has been designated, click the Extract button. A new unzipped version of the Template is now stored in the selected location. You are now ready to begin using the Template.

4. Logging on to the Template

When the Template is opened, the first screen that appears is the Logon screen. When the Template is being opened for the first time, the Agency and Password boxes will be blank. In the Agency box, enter your Agency's assigned Universal Provider ID number (UPID). The number entered must be 5 digits in length. If your assigned UPID is only 4 digits in length, add a "0" to the beginning of the number. UPIDs have been assigned to each Agency by ODADAS. If you are unsure of your Agency's UPID, you can look it up on the Outcomes Web site or contact ODADAS.



After entering the UPID, enter a password. Be sure to remember the password you create and share it with other staff who will be using the Template. You will not be able to log in the next time you open the Template if you do not enter the proper password.

When opening the Template in the future, the Agency box will be filled automatically with the previously entered UPID. Just enter the appropriate password and click "OK" to proceed to the Main Switchboard.

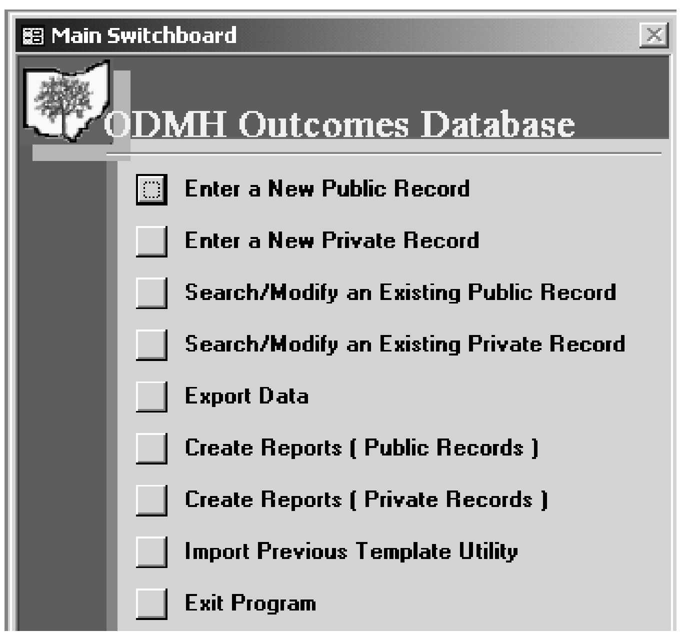
5. Export Reminder

If all existing records have been exported in previous sessions, the Export Reminder will not appear and you will proceed directly to the Main Switchboard. However, if the Template contains Outcomes data that have been entered within the past 2 weeks but have not been exported, a dialog box will appear listing the instruments containing data that need to be exported.

Please note that the export process creates a text file according to the Outcomes data specifications and stores it in the designated location so that it may be to be sent to the Board. The export process does not send Outcomes data to your Board or to ODMH automatically. For more information on how to perform exports, please refer to Section F, “Exporting Template Data.” After noting the reminder, click “OK” to proceed to the Main Switchboard.

The Main Switchboard

The Main Switchboard presents the functions available in the Template, including entering data, searching and modifying existing data, preparing data for export to the Board, creating individual-level care management reports, and importing data from a previously released version of the Template. The different options can be selected by clicking the appropriate button to the left of the text or by tabbing to the desired option and pressing the Enter key.



The first two options are both for data entry, one for public records and one for private records. Public records are Outcomes data that have been collected for clients whose mental health services are paid for in full or in part by the public mental health system. These clients have a Universal Client Identifier (UCI) in the Department’s claims system (MACSIS). Private records are Outcomes data that have been collected for clients whose mental health services are paid by private insurance or other non-public funds. These clients do not have a MACSIS UCI. Private records are NOT included in the export process and, therefore, are not sent to the Board or ODMH. Entering private records into the Template allows an Agency to track Outcomes for all clients, not just those that receive public funds. More information on entering Outcomes data is provided in Section D of this document. **NOTE: All records exported to the Board must be entered as public records and have a valid UCI.**

The third and fourth options allow Template users to search for records and to add and/or change records that were entered previously. Like data entry, there is a separate search/modify function for public and private records. Section E contains additional information about the search/modify function.

The fifth option on the Main Switchboard is the "Export Data" function. During the export process, a text file containing Outcomes data that have not been exported previously is created according to the Outcomes data specifications. The text file is stored in a designated location so that it may be to be sent to the Board. Only public records are exported; private records are stored in the Template but never exported. Additional information about exporting Template data is included in Section F of this document.

The sixth and seventh options allow Template users to generate individual-level reports for use in treatment planning with clients. Again, there is a separate reporting function for public and private records. Section G of this document contains additional information about the reporting function.

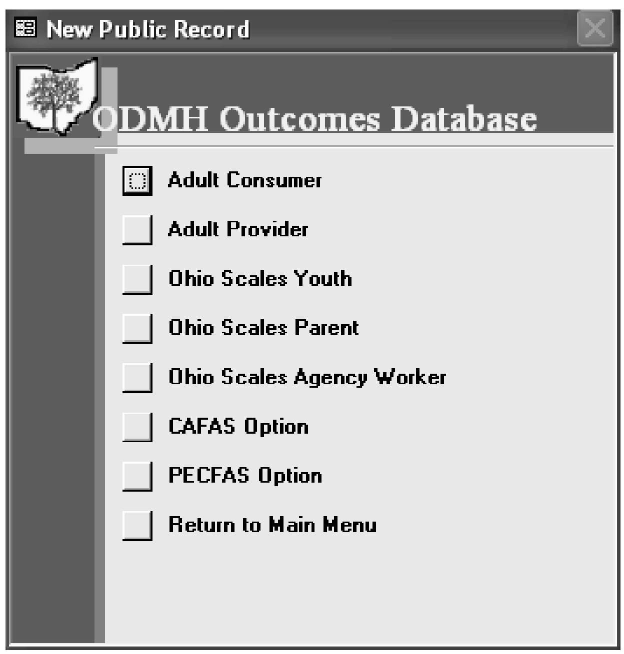
The "Import Previous Template Utility" function can be used to transfer data from a previous version of the Template to the current version. More information on how to transfer data to a new Template can be found in Section I of this document. If updating from a previous version of the ODMH Template, all Adult Consumer B records will be coded as Adult Consumer A records during the transfer.

To close and exit the Template, click the last option, "Exit Program". A dialog box will appear to confirm that you really want to exit the Template.

Entering Outcomes Data

1. The Instrument Menu

When you select one of the two data entry options on the Main Switchboard, the menu of Outcomes instruments appears. These are the instruments for which data can be entered into the Template. The title bar at the top of the menu indicates whether you have chosen to enter a public or a private record. Click the button next to the name of the instrument you would like to enter. To return to the Main Switchboard, click the "Return to Main Menu" option.



2. Types of data entry fields

There are several types of fields you will encounter when entering data. Descriptions of these different field types are provided below.

Text boxes

Text boxes allow you to manually type in values. Typically, you are restricted in the type and amount of data you can enter in these fields. For example, the UCI field allows you to only enter numbers (no letters), and you cannot enter more than 12 digits.

Example: MACSIS UCI #

Option boxes

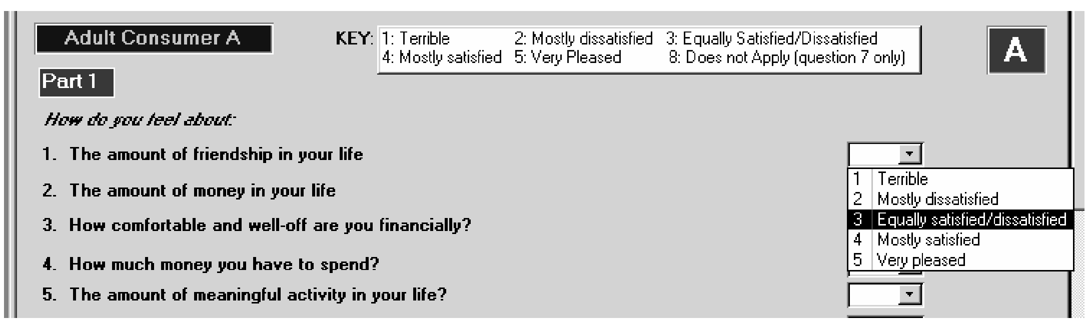
These boxes contain a set of options from which you can choose. You select only one option out of the set by clicking on the circle next to the desired option.

Example: Gender

Combo boxes

The majority of the fields in the Template are combo boxes. You can either manually type in appropriate values or click the down arrow to view and select a valid value on the pull-down menu. Values placed in these fields must be listed on the pull-down menu; otherwise, an error message will appear and you will be asked to enter a new value.

Example: Parts 1 – 5 on Adult Consumer Form A



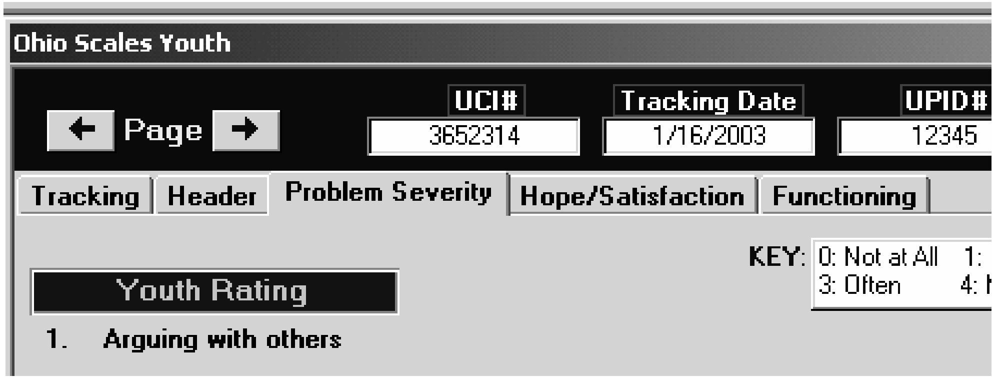
3. Navigating data entry screens

Resizing data entry screens

If you cannot see the entire screen, i.e. you need to scroll horizontally to move around the screen, you can resize the screen by moving your cursor to the lower right corner. When the cursor turns to an arrow, you can drag the arrow to the right to resize the screen. You may need to move the screen to the upper-left corner first to allow more room for this resize operation.

Moving between fields and sections

The fields on the data entry screens generally go in order, from top to bottom, left to right. Use the Tab key to advance to the next field, or press the Tab key while pressing the Shift key to go back to the previous field.

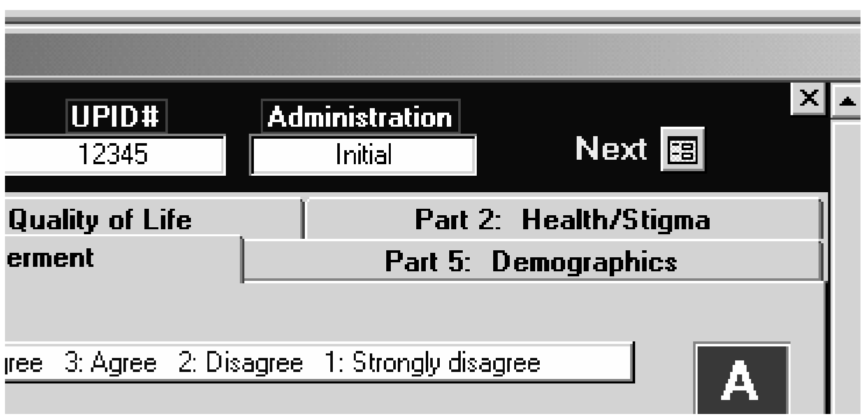


Since the instruments contain more fields than can fit on one screen, the items are divided among multiple “tabs” for each record you enter. Each tab represents a different section of the Outcomes instrument you are entering. You can move between tabs in several ways:

- Click the left and right arrow keys in the upper-left corner of the screen to move forward and back between sections.
- Click the section title tabs near the top of the screen (e.g., Tracking, Header, etc) to jump to a different section of the instrument.
- Press the Tab key after entering a value in the last field on a page. The screen automatically advances to the next section of the instrument (unless you are in the last section).

<u>Advancing to a new record</u>

There are two Next buttons on each data entry screen. One button is displayed at all times in the upper-right corner of the screen and the other button is in the lower-right corner of the last tab/section of the current instrument.



For a public record, when either of these buttons is clicked, the required fields are checked to ensure that they contain complete and valid data. If data in any of these fields are missing or invalid, a brief message about the error appears and the screen advances to the first field that needs to be corrected. Records that have incomplete or invalid data in **required fields** cannot be saved. Private records do not contain any required fields. Therefore, when either Next button is clicked, they are automatically saved.

After the record is saved, a dialog box appears asking if you want to enter another record for the same instrument. If you select “No”, the current record is saved and the Instrument Menu appears. If you select “Yes”, you are then asked whether you want to enter the same type of record, public or private. If you click “Yes”, a new blank screen appears for the same instrument and type of instrument (public or private) you just entered. If you click “No”, a new blank screen appears for the same instrument but different type of instrument (public or private) than you just entered. The change in type of instrument is noted in the title bar of the new screen that appears.

<u>Closing a data entry screen</u>

To close a data entry screen and return to the Main Switchboard, click the “X” button located in the upper-right corner of the screen. When you click this button, a dialog box will appear asking if you want to save the record you just entered or modified.

If you select “No”, the current screen (record) is cleared and you are returned to the Instrument Menu.

For a public record, if you select “Yes”, the required fields are checked to ensure that they contain complete and valid data. If data in any of these fields are missing or invalid, a brief message about the error appears and the screen advances to the first field that needs to be corrected. Records that have incomplete or invalid data in required fields cannot be saved. If all of the required fields are complete and valid, the record is saved and you are returned to the Instrument Menu.

Private records do not contain any required fields. If you select “Yes”, the record is saved and you are returned to the Instrument Menu.

4. Tracking Sheet & Header screens

The Tracking Sheet and Header screens deserve special attention because they contain fields that are critical to the successful entry and use of Outcomes data at the Agency level as well as successful transmission of public Outcomes records to the Board and ODMH. The Tracking Sheet is the first screen you see when entering a new record and is the same for every instrument. The Header screen is the second tab/section of each screen and varies slightly from instrument to instrument. Key fields (e.g., UCI, Tracking Date, UPID#, and Administration) are always located at the top of the screen above the tabs. These fields are filled in automatically once the corresponding data are entered on the Tracking Sheet. **You do not need to enter data in these fields**.

Required fields, labeled in blue in the Template, are found only on the Tracking Sheet and Header screens of public records. Private records do not contain any required fields. Required fields must contain complete and valid data. If data in any of these fields are missing or invalid, the existing record cannot be saved and the Template will not allow you to advance to a new record.

Although MACSIS UCI # is not labeled in blue in the Template, it is also a required field for public records. Each record must have a complete and valid Universal Client Identifier (UCI) in order for the record to be submitted to the statewide Outcomes database successfully. If the UCI submitted with an Outcomes record is incomplete or does not match the client’s UCI in the Claims (MACSIS) Member System, the Outcomes record will be rejected.

Required fields in the Template include the Tracking Date, Instrument Type, Administration, MACSIS UCI #, Agency ID # (UPID), Date of admission, Date Instrument Completed, First Name, Last Name, and Date of Birth.

Tracking Date: The date that an Outcomes record is entered into the Template. This field is completed automatically and defaults to the current date.

Instrument Type: Indicates the specific instrument for which data are being entered. This field is completed automatically based on the instrument selected on the Instrument Menu and cannot be changed.

Administration: The survey administration number (Initial, 3 Month, 6 Month, 9 Month, Annual, Termination).

Agency ID # (UPID): The Universal Provider ID number (UPID) assigned to your Agency by ODADAS. The number entered must be 5 digits in length. If your assigned UPID is only 4 digits in length, add a "0" to the beginning of the number. If you are unsure of your Agency's UPID, you can look it up on the Outcomes Web site or contact ODADAS.

Date of admission: The date that the client was first admitted to your Agency.

Date Instrument Completed: The date that the instrument was completed by the respondent (client, family member, or Agency worker).

First Name: The first name of the client.

Last Name: The last name of the client.

Date of Birth: The date the client was born.

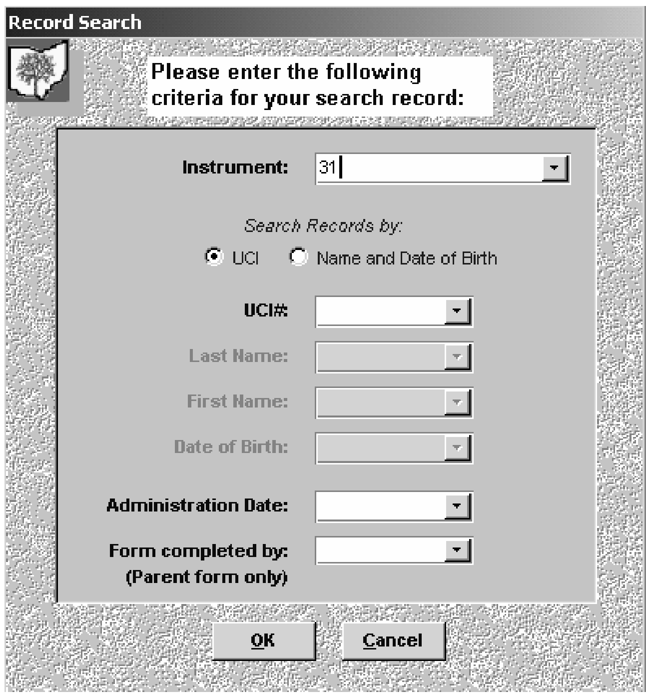
For public records, if you enter a UCI that already exists in the database, the individual's personal information (Date of Admission, Name, and Date of Birth) from the previous record is automatically filled in on the Header page. This information can be modified in your new record but should only be changed if absolutely necessary.

Searching and Modifying Outcomes Data

The third and fourth options on the Main Switchboard allow Template users to search for a particular record that was entered previously and add and/or change the record. Like data entry, there is a separate search/modify function for public and private records. The difference is that when searching for a Public record, you can search by UCI or by the client's name and date of birth. When searching for a Private record, you can only search by name and date of birth since Private records are not assigned a UCI.

When you select one of these functions, a dialog box appears asking you to enter search criteria that will be used to find the particular record for which you are searching. The search criteria vary slightly from instrument to instrument. For example, the "Form Completed by" field is visible only if the Ohio Scales Parent or Ohio Scales Worker instrument is selected.

The criteria should be entered from top to bottom since choices for each field are dependent on previously selected criteria. For example, once you have selected an instrument to find, your choices of UCIs are limited to those that have been entered previously for that particular instrument.



After setting the search criteria, click the OK button. The specified record is displayed on the appropriate data entry form. Any changes you make to any of the fields in this record will affect the original record, i.e., the changes will overwrite any old values contained in this record when the record is saved. After modifying the record, a dialog box will appear asking if you want to save the record. A second dialog box will ask if you want to mark this record for re-export. If you click "Yes," the changes you made are saved and the record will be included in the next export file that is created. If you click "No", the changes you made will still be saved but the newly revised record will not be included the next time you create an export file for that particular instrument.

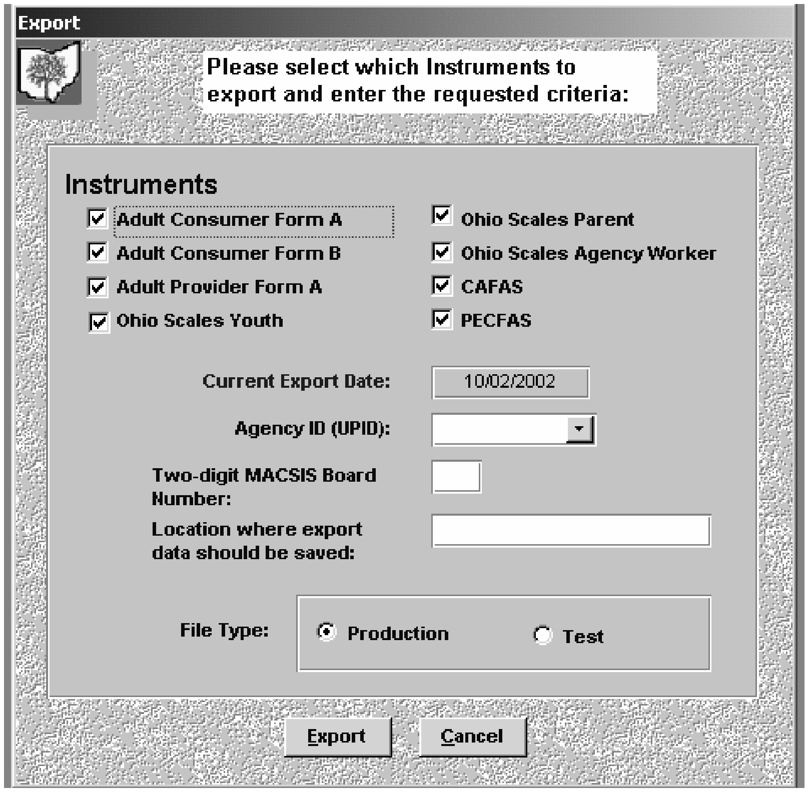
Exporting Template Data

Outcomes records entered into the Template at your Agency should be exported and sent to your designated Board on a regular basis so that the Board can then send the data to ODMH for analysis and reporting purposes. The frequency of exporting data to the Board is a local decision, but we recommend exporting data at least once a month.

It is important to note that the "Export Data" function does not automatically send Outcomes data to your Board or ODMH. During the export process, a text file containing Outcomes records that have not been exported previously is created according to the Outcomes data specifications and is stored in a designated location on your computer. Only public records are exported; private records are stored in the Template but never exported.

1. Specifying export criteria

To begin the exporting process, click “Export Data” on the Main Switchboard. A dialog box will appear allowing you to designate the data to export. The default is set so that all of the instruments are marked for export.



You can leave all boxes checked if you want to export records contained in all instruments. However, if you only want to export records for a particular instrument or instruments, click on the checkbox to remove particular instrument(s) from the export process. Next, select the 5-digit UPID for which you want to export records from the drop-down box.

If this is the first time you have ever exported records, you must enter your two-digit MACSIS Board Number and the location where export data should be saved. The default location is C:\Export\. When exporting records on subsequent occasions, the 2-digit MACSIS Board Number and the location where export data should be saved will be filled automatically after an Agency UPID is selected. Finally, click the type of file that is being exported (production or test).

After entering your export criteria, click the “Export” button. At this time, you may see a message telling you that the C:\Export\ folder does not exist and that one will be created for you. If this is the folder in which you want exported files to be saved, just close the dialog box and the folder C:\Export will be created. If you want to save exported files in a different location, enter the location in the text box labeled, “Location where export data should be saved”. A fixed-width text file (or files) containing records you have entered is now stored in the designated location. When the export process is completed, a message will appear telling you the name of the file that was just created. **NOTE: You should record the filename in order to locate it in your designated location later, when you are ready to send the file to the Board.**

The Template will cycle through each of the instruments you selected and will create a separate export file for each instrument type. If there are no new or revised records to export for one of the instruments you selected, a message will appear stating that there are no new records to export and that the export process has finished.

2. Naming exported files

Files must be named according to the guidelines specified by the ODMH Outcomes Team in the Outcomes Data Flow Guide (see below) or they will be rejected. The Template automatically names exported files according to the required ODMH naming conventions. Therefore, you do not need to change the filenames of exported files. **EXCEPTION: Previously rejected production files that are being resubmitted for production processing should be given different filenames than the those used for previous submissions. Specifically, the Julian**

calendar date in the filename should be changed from the previous export date to the current Julian calendar date. Julian calendar dates are simply a continuous count of days in a year. For example, if the date on your normal calendar is February 2 then the Julian Calendar date would be 33, since February 2 is the 33rd day of the year. There are various free tools on the Internet that convert calendars to Julian dates (see http://www.fs.fed.us/raws/book/julian.shtml).

It is important to note that you cannot change a filename in order to resubmit a previously rejected file within the Template. Instead, you should open Windows Explorer and go to the location where the file is stored (the default is C:\Export). Locate the file that you want to rename and select it. Click on the File menu and select the "Rename" option. You can now change the name of the file. Again, a file should only be renamed if it was previously rejected and is being resubmitted for production processing. **For additional information on how to re-export files, see section H.3. Re-exporting records.**

Although the Template automatically creates correct filenames for exported files, Template users should have a basic understanding of the different parts of the naming convention required by ODMH. A table containing this information is provided below. Basically, the naming convention differs for each file depending on whether the file is being submitted in test or production, whether it is an individual or batch file, and whether the file is being submitted for the first time or is being resubmitted.

Most of the Outcomes files submitted to ODMH contain records for a particular instrument from one Provider. However, some Boards combine the records from different Providers into one file before submitting them to ODMH. This is called a *batch file*. The test and production systems at ODMH are both designed to process individual or batch files, so the decision to batch is left to a Board's discretion. It is important to note, however, that individual and batch files require different naming conventions. Also, if a Board chooses to submit a batch file, a batch production report will be returned to the Board, that is, a report containing information about records submitted by different Providers. It is the Board's responsibility to separate the results by Provider and to give feedback to each Provider included in the batch.

Please note that **all filenames must be in lowercase letters or your file will be rejected**.

The Outcomes Template exports files using the following naming convention:

Name	Length	Position	Description
File Type	1	1	"t" for test file or "h" for production file
Instrument Type	2	2-3	10=Adult Consumer Form 11=Adult Provider Form 30=Ohio Scales - Youth Version 31=Ohio Scales - Parent Version 32=Ohio Scales - Worker Version 33=CAFAS 34=PECFAS
Board Number	2	4-5	MACSIS Assigned Board Number
UPID	5	6-10	MACSIS Assigned UPI
Year	2	11-12	Year of File Creation
Julian Date	3	13-15	Date of File Creation
Submission Number	2	16-17	Number of submissions on a given day 01=first submission, 02=second submission, etc.
Separator	1	18	**.** (period)
File Extension	3	19-21	txt
EXAMPLE: Ohio Scales-Youth test file submitted on 1/31/02 by the Ashland Co. MH Board. t3003101550203101.txt t | 30 | 03 | 10155 | 02 | 031 | 01 | . | txt			

Generating Reports

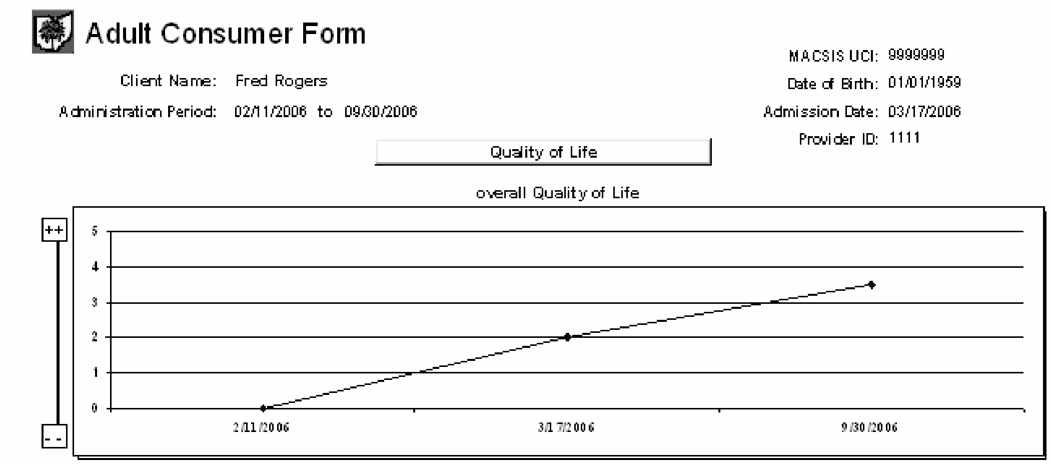
There are two “Create Reports” options on the Main Switchboard, one for public records and one for private records. These options allow Template users to generate individual-level reports for use with clients.

1. Types of Reports

Several individual-level reports can be generated using the Template. A description and example of each report is included below. At this time, the Template does not have a built-in aggregate reporting function. However, an add-on tool has been created by a local system to augment the Template’s functionality. This tool, designed for use with Access 2000 only, allows Template users to generate Agency aggregate reports as well as shorter individual client reports. More information about this tool is available in Section H.

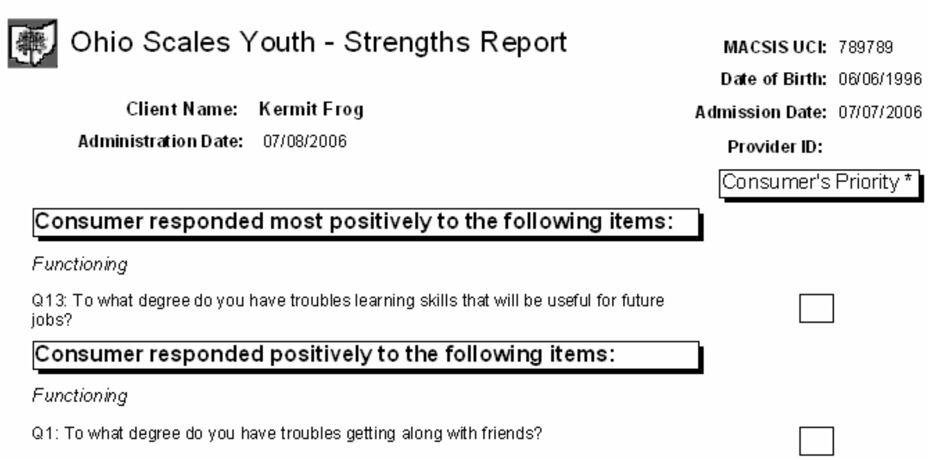
Change Over Time Report

This report consists of a series of line graphs, each representing an individual’s scores on a particular subscale across administration periods. The report is available for the following instruments: Adult Consumer Form A, Adult Consumer Form B, Ohio Scales-Youth Form, Parent Form and Worker Form. See the example below.



Red Flag and Strengths Reports

These reports list items that an individual responded to negatively or positively for a particular administration. On the Red Flag Report, the results are grouped by “most negative” and “negative” responses while results on the Strengths Report are grouped by “most positive” and “positive” responses. The results on each report are also grouped by the section of the instrument in which they appear (e.g. Quality of Life, Symptom Distress, etc.). Both reports are available for Adult Consumer Form A, Adult Provider Form A, Adult Consumer Form B, and the Ohio Scales-Youth, Parent and Worker forms. Both reports also include a “Consumer’s Priority” column in which priority items can be identified by the client and clinician working together in a treatment session.



Ohio Scales Youth - Strengths Report

MACSIS UCI: 789789
Date of Birth: 06/06/1996
Client Name: Kermit Frog
Admission Date: 07/07/2006
Administration Date: 07/08/2006
Provider ID:

Consumer's Priority *

Consumer responded most positively to the following items:

Functioning

Q13: To what degree do you have troubles learning skills that will be useful for future jobs?

Consumer responded positively to the following items:

Functioning

Q1: To what degree do you have troubles getting along with friends?

Ohio Scales Youth - Red Flag Report

MACSIS UCI: 789789
Date of Birth: 06/06/1996
Client Name: Kermit Frog
Admission Date: 07/07/2006
Administration Date: 07/08/2006
Provider ID:

Consumer's Priority *

Consumer responded most negatively to the following items:

Problem Severity

Q15: To what degree have you experienced the following problem in the past 30 days: Feeling lonely or having no friends? ☐

Consumer responded negatively to the following items:

Functioning

Q10: To what degree do you have troubles participating in recreational activities (sports, swimming, bike riding)? ☐

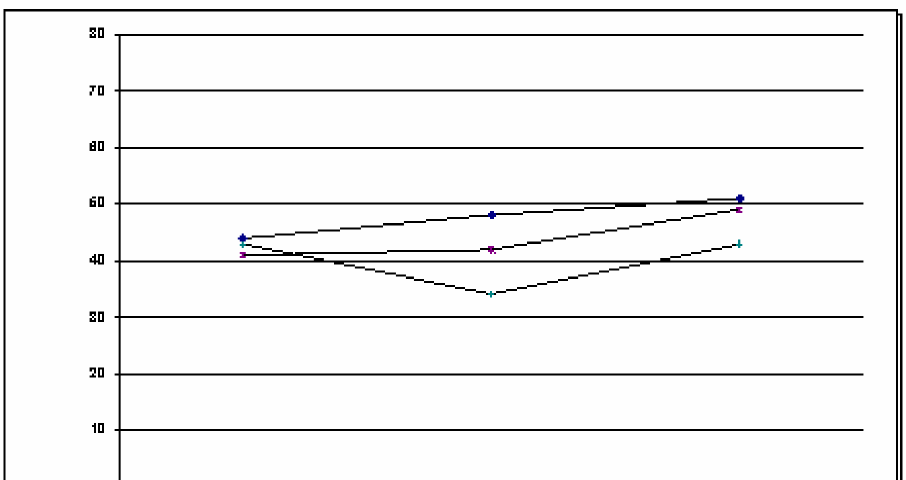
<u>Ohio Scales Version Comparison Report</u>

This report consists of line graphs that compare Youth, Parent, and Worker responses on the Functioning and Problem Severity subscales across three previous administrations. A table containing the actual subscale scores for each respondent is located at the bottom of each graph.

Ohio Scales Version Comparison

MACSIS UCI: 8888888
Client Name: Kermit Frog
Date of Birth: 10/07/1990
Administration Period: 11/15/1999 to 11/15/2000
Admission Date: 11/11/1999
Provider ID: 54321

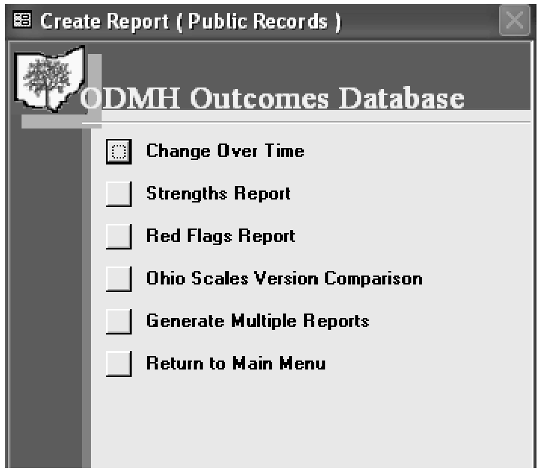
Functioning



	11/16/1999	6/16/2000	11/16/2000
Y	44	48	61
Pm			
Pf			
Pcm			
Pcf	41	42	49
Po			
W	43	34	43

2. The Reports Menu

When you select one of the two reporting options on the Main Switchboard, a menu of possible reports appears. The title bar at the top of the menu indicates whether you have chosen to generate a public or a private client report. Click the button next to the name of the report you would like to generate. If you would like to generate more than one report for a particular client, click the "Generate Multiple Reports" option. To return to the Main Switchboard, click the "Return to Main Menu" option.

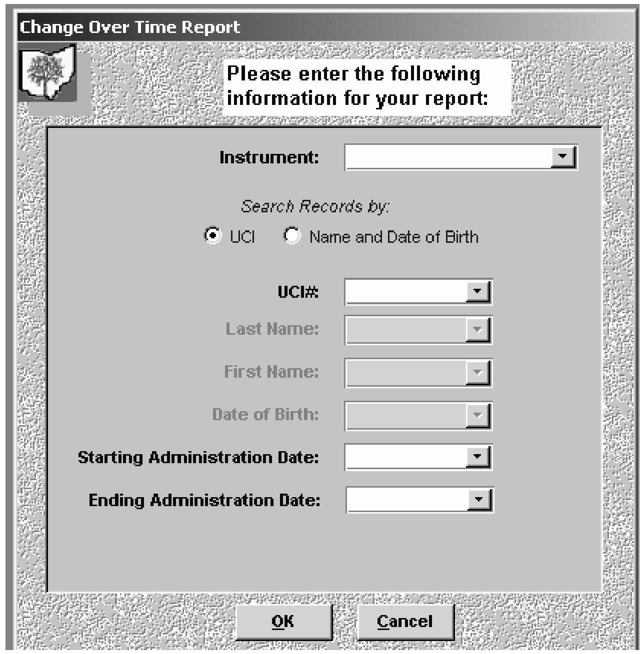


3. Report Criteria Menus

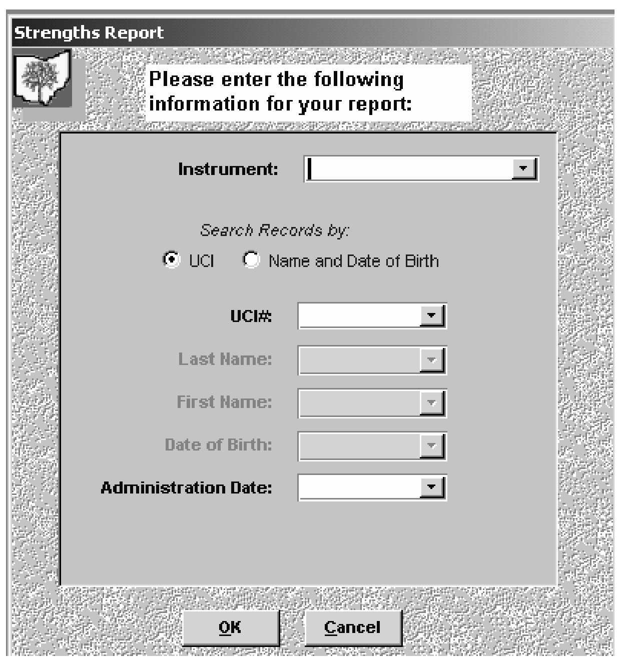
After you select a report option, a Report Criteria Menu will appear. Each Report Criteria Menu differs based on the type of report you want to generate and how you want the Template to search for report data, by UCI or by Name and Date of Birth. Since private records do not contain a UCI, Name and Date of Birth criteria must be specified to generate a report based on these records.

Because the selection criteria fields are all combo boxes, you can avoid typing errors by choosing from the pull-down menu for each field. The fields are updated in order from top to bottom. For example, after you select an instrument, the UCI combo box displays UCIs in the database for that particular instrument. After a UCI is selected, only that client's administration dates are listed in the administration date combo box. Examples of the different Report Criteria Menus are shown below.

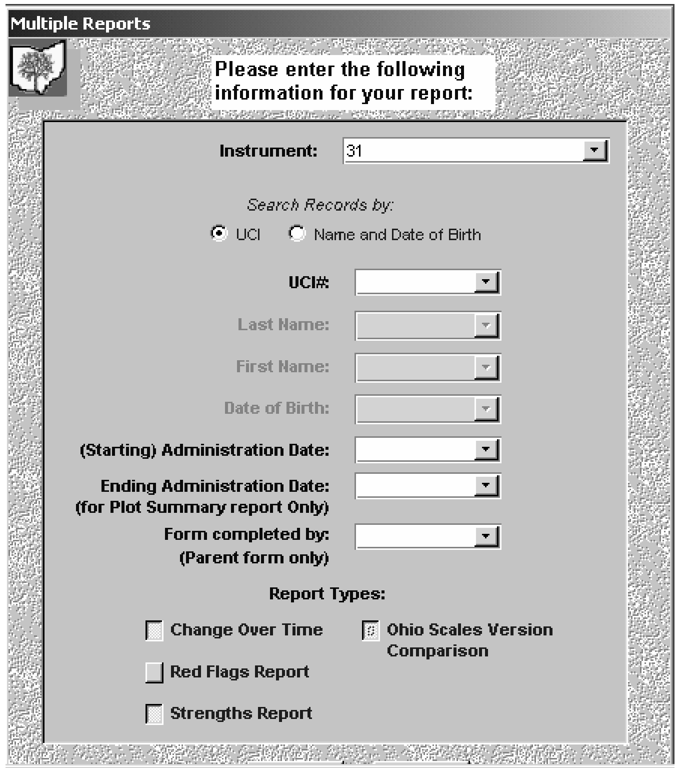
Report Criteria Menu for Change Over Time and Ohio Scales Version Comparisons Report



Report Criteria Menu for Strengths and Red Flags Reports



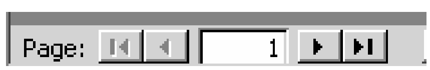
Report Criteria Menu for Generating Multiple Reports



4. Navigating report display screens

If only one report option is selected, the requested report will appear in a full-screen display. If multiple report options are selected, the resulting reports will be generated and displayed as different tiles on your screen rather than appearing in a full-screen display like single reports.

To navigate between different pages of a report , use the arrows located in the lower-left corner of the report screen. These arrows will allow you to move to the first page, the previous page, the next page, or the last page of the report.



You can highlight the different report tiles to make a certain report active. When active, a report can be printed or its zoom level can be changed for viewing. To adjust the zoom level of a report, click the magnifying glass icon on the report menu bar in the upper-left corner of the screen and then click on the report. You can also adjust the appearance of the report for viewing by adjusting the zoom percentage. Reports can be printed by clicking the printer icon on the report menu bar or by selecting the Print option from the File menu also located in the upper-left corner of the screen.

When you are finished viewing and/or printing your reports, you can close the report by clicking the “X” in the upper-right corner of the report or by clicking the “Close” button on the report menu bar.

Template Design Details

1. Template tables

Template users who have experience using MS Access may want to make adjustments to the tables that store the data in the background of the Template. Before making any adjustments staff are encouraged to make a copy of the Template in case unintended changes occur to data in the tables.

To access the Template tables, hold down the **Shift** key while double-clicking the Template icon. Once the Access program begins to open, release the shift key. The screen that appears contains an Objects menu on the left and a listing of Template objects on the right side. Click the **Tables** tab on the Objects menu to see a list of all of the tables in the Template.
Important tables:

Table Name	Table contents
AdultForm	**Public** Adult Consumer A, Adult Provider A, and Adult Consumer B records.
AdultFormV	**Private** Adult Consumer A, Adult Provider A, and Adult Consumer B records.
KidForm	**Public** Ohio Scales Youth, Parent, and Worker records.
KidFormV	**Private** Ohio Scales Youth, Parent, and Worker records.
lg	Agency name and password used in the Logon Screen.
ExportTracking	Information about all export files created, including file location, date of export, and type of file (test or production).

2. Changing your password or UPID

1. Enter the background of the ODMH Template by holding down the Shift key while opening the Template.
2. Click on the **Tables** tab, which can be found on the left side of the table.
3. Double click on "**lg"** to open the table.
4. The **Agency** column shows the field that is automatically filled on the Logon Screen. The **pw** column is the password for your copy of the ODMH Template.
5. Highlight and type over the number or word you want to change (either the Agency or password) and exit the table by clicking the "x" in the corner of the **lg** table.
6. A dialog box will ask if you want to save the changes, click "yes".

3. Re-exporting records

For advanced Access users with query experience, revising **expdate** in order to re-export records can be simplified using a query similar to the one shown below.

```
UPDATE AdultForm SET AdultForm.expdate = Null
WHERE (((AdultForm.expdate)=#12/2/2002#) AND ((AdultForm.instrum)=10));
```

Non-advanced users should follow these steps.

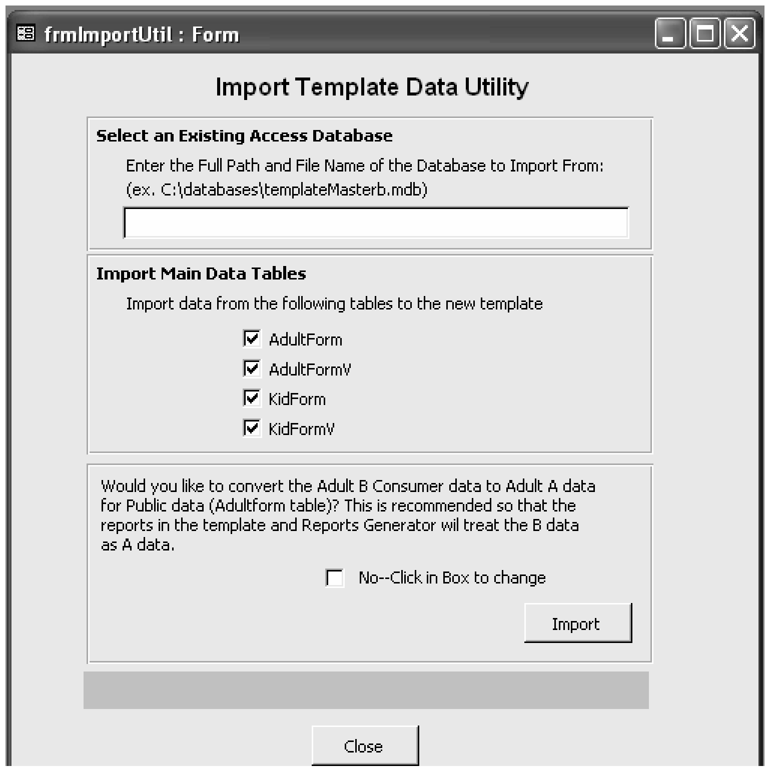
1. Enter the background of the ODMH Template by holding down the **Shift** key while opening the Template.
2. Click on the **Tables** tab, which can be found on the left side of the.
3. Double click on either the **AdultForm** or **KidForm** table depending on which type of records you want to re-export.
4. Locate the **expdate** column (three columns from the far right side of the table).
5. The date in the **expdate** table is the date that the record was exported. Delete dates from the **expdate** column for records that you want to re-export.
6. Close the table by clicking "x".
7. A dialog box will ask if you want to save the changes, click "yes".

Template Tools

Import Previous Template Utility

The “Import Previous Template Utility” function on the Main Switchboard can be used to transfer data from a previous version of the Template to the current version. Before importing data from a previous version of the Template, we strongly advise you to save a backup copy of the Template in a separate location.

After clicking the “Import Previous Template Utility” button, a dialog box will appear asking you to enter the location and title of the previous version of the Template (e.g., C:\Outcomes Template\template021601a.mdb). You should make sure you are using the exact title and location of the previous version of the Template. If there is any difference between the Template title and location entered, and the path name of the previous Template, the import utility will not work.



After entering the correct title and location, select the table(s) from which you want to import data. Check “AdultForm” to import public Adult Consumer A, Adult Provider A, and Adult Consumer B records. Check “AdultFormV” to import private Adult Consumer A, Adult Provider A, and Adult Consumer B records. Similarly, check “KidForm” to import public Ohio Scales-Youth, Ohio Scales-Parent, Ohio Scales-Worker, CAFAS, and PECFAS records and check “KidFormV” to import private Ohio Scales-Youth, Ohio Scales-Parent, Ohio Scales-Worker, CAFAS, and PECFAS records. The default option is to import data from all instruments.In order for data to be imported from a previous version of the Template, the AdultForm, AdultFormV, KidForm and KidFormV tables must be empty in the new Template. This eliminates the potential for importing the same data more than once and avoids creating duplicate data.

Adult Consumer B records can be converted to Adult A Public data the check box at the bottom of the screen can be clicked. This will ensure that the auto fill capabilities of the Template will continue to work when subsequent administrations are completed for these consumers.

NOTE: Users cannot import data between Access 97 and Access 2000 databases. When importing data, the database versions must be the same: Access 97 to Access 97 or Access 2000 to Access 2000.

Template Reports Generator

The Reports Generator was designed by a local system 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 MS Access 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) if you have any 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.

<u>Downloading the Report Generator</u>

1. Download the Reports Generator (**clinadminrep.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". A Reports Generator icon will appear on your desktop.

<u>Unzipping the Report Generator</u>

1. The Reports Generator must be unzipped before it can be used with the Template. Double-click the Reports Generator icon on your desktop.
2. In the window that appears, click once on the Reports Generator file (**clinadminrep.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 (**clinadminrep.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 asking 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 Template.

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 now 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 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 now 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. 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 now 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 now 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.*

- **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