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 https://msti.org/mstinstitute/contact/help.html.

Objectives of the Demonstration:

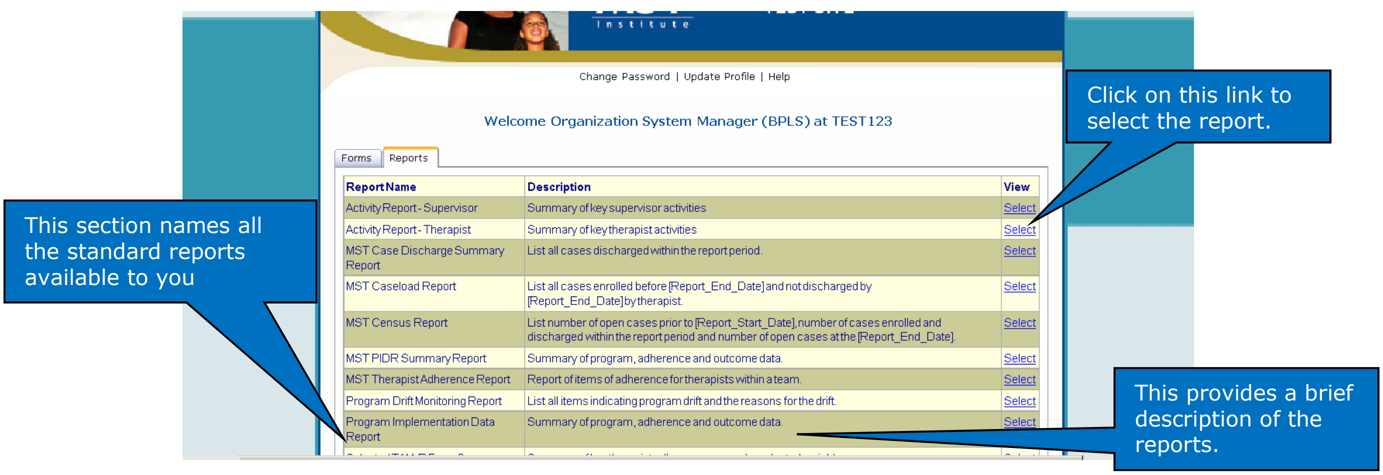
Today, we will go over the following –

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

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

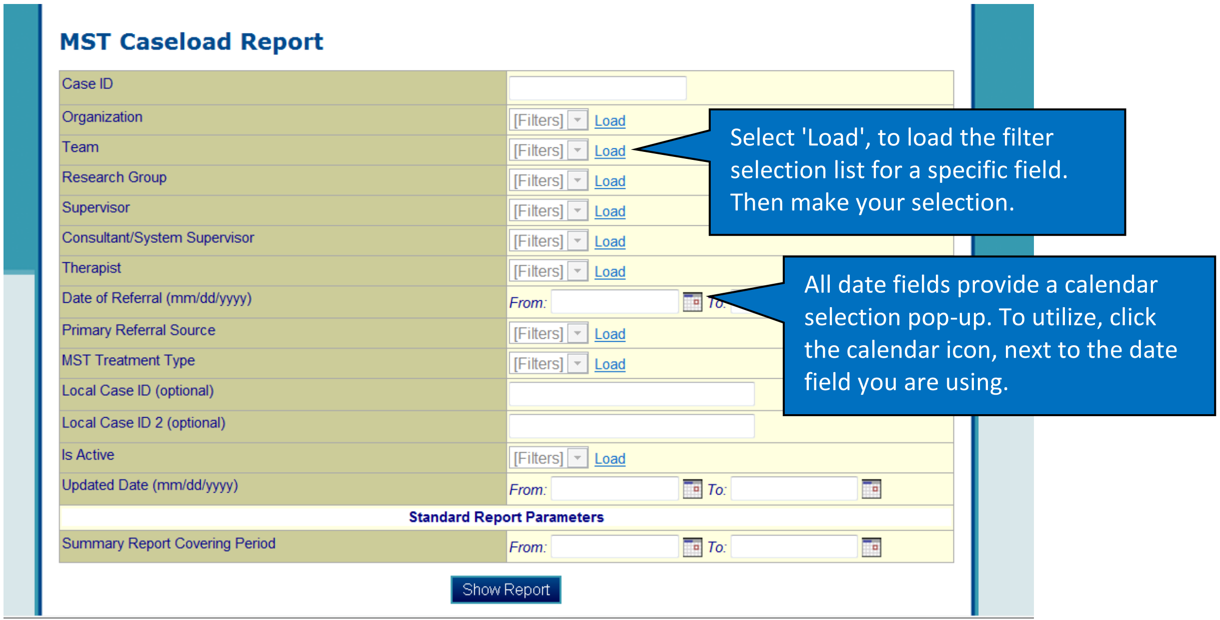
Select DEMO Site and use a System Manager login*:* osm1/osmdemo1
If ever prompted to change the password for this user, please change back to the <u>same exact password</u> as before: osmdemo1

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.

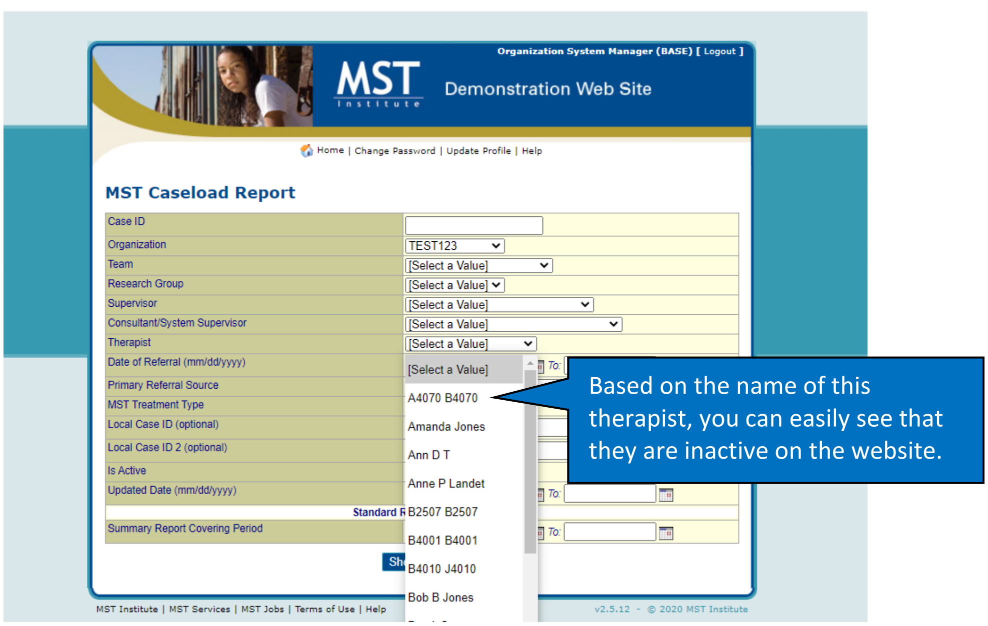


Once a report is selected from the standard report menu, the system will always take you to the **Report Field Filters** screen. The **Report Field Filters** screen allows the user to specify the form, organization, team, research group, etc. he or she wants to report on. Furthermore, the **Report Field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

Example selection screen



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. When loading the information for supervisor or therapist, you will also see names listed that do not appear as names. When a user is made inactive on the website, the system automatically deletes the person’s name. The name of the user is then stored with the first initial of the first and last name, and their MSTI ID number. Therefore, when running reports, you will see these de-identified user’s names along with the full names of the active staff in the filter dropdowns. Please see screenshot below for an example of what this looks like. You can remove these de-identified names from the reports themselves by filtering by active staff, when that option is available.



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.

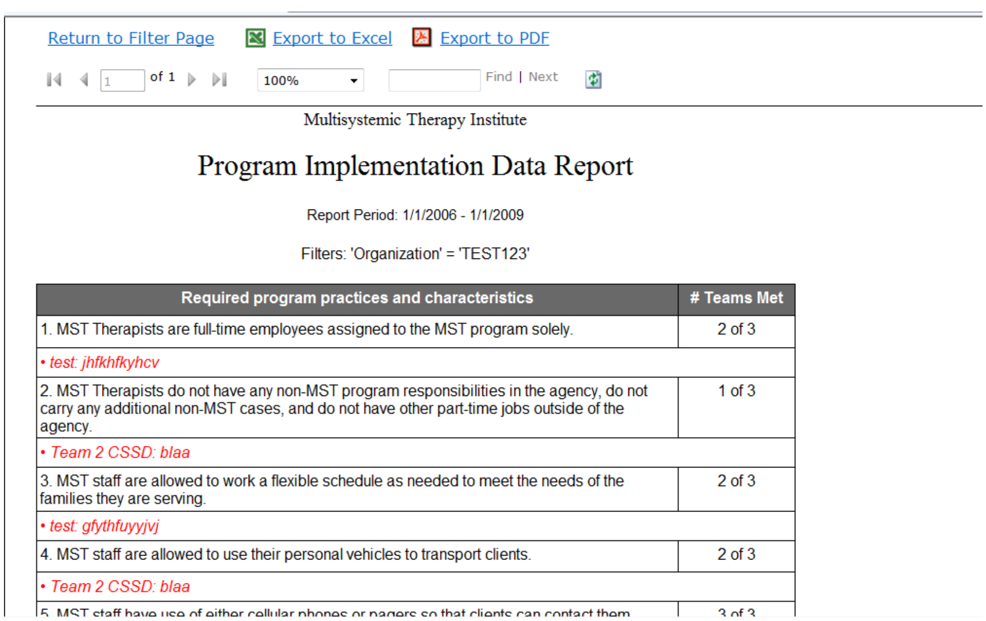
Monitoring Overall Program Adherence

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.

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"



Return to Filter Page | Export to Excel | Export to PDF

1 of 1 | 100% | Find | Next

Multisystemic Therapy Institute

Program Implementation Data Report

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

Filters: 'Organization' = 'TEST123'

Required program practices and characteristics	# Teams Met
1. MST Therapists are full-time employees assigned to the MST program solely.	2 of 3
• *test: jhfkhfkyhcv*	
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.	1 of 3
• *Team 2 CSSD: blaa*	
3. MST staff are allowed to work a flexible schedule as needed to meet the needs of the families they are serving.	2 of 3
• *test: gfythfuyyjvj*	
4. MST staff are allowed to use their personal vehicles to transport clients.	2 of 3
• *Team 2 CSSD: blaa*	
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.

The Program Practices and Characteristics section displays information from the most recent Program Review Form for each team that has a "covered period end date" within the reporting period. If there isn't data from a form completed during the selected period, the following message will appear at the beginning of the report, "No Program Reviews were found within the current report 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 Review Form items 9, 21, 30, 31,32, 34, 35, 38 have been demonstrated through analysis of MSTI data as critical items that have potential to provide meaningful information to the Expert and the Program Leadership about potential risks to the team, as well as strengths to leverage for sustainability. The Program Review Form has been modified so that these items will be displayed in bold font on the PIDR reports. The report will only display items 19 and higher if they are identified as potential problems. Running the report against old data that included the response, "Don't know", will display items answered "Don't know" as well as potential problems.

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 - 13) 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 open for more than 30 days, while #11 is based on the number of youth with a TAM-R.

  The Supervisor Adherence Scores items include the total number of SAM forms collected, the average number of SAMs collected per therapist.

- ***Case Progress Review***

  The Case Progress Review section (items 14 - 23) 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 (#14) and also gives the number of referrals closed without services, i.e., cases closed without a date of first visit (#15). **Cases without a date of first visit will be excluded from calculations of all the remaining items**. The "Percent of cases completing treatment" (#16) is calculated by taking the percentage of those cases closed by mutual agreement (#17) out of those cases where the team had the opportunity to provide a full course of treatment (Case Progress Review categories #17, #18, and #19). 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 17 - 23) 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 20 – 23) 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 29- 34) 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 35 - 43) 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.

- ***Team Performance Over Time***

The final page of the report includes **Team Performance Over Time** to show how performance has changed from previous time periods equivalent to the selected time period. If the report includes data from multiple teams within an organization, it will be the average of those teams on the key performance indicators which is also color coded to indicate how close the performance is to the targets established by MST Services.

The data for the current period should be the same as that displayed in the Program Data Table on page 2 (or page 1 if there is no Program Review data) for all identical indicators, except for items "Overall Average Adherence Score" and "Percent of youth with average therapist adherence score above threshold". These items will often not have the same result as the same item in the Program Data Table, as the calculation for that item is slightly different. The difference in methodology is as follows:

- The Program Data Table calculates these scores using *all open cases*.
- The Team Performance Over Time limits the calculation to *discharged cases*.

Finally, users can 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

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

*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.

MST 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 **MST Dashboard Report** allows the monitoring of the key performance indicators "at a glance" for Organizations or Networks. The first section displays key performance indicators by team within the Organization or Network 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. The color alerts let users know what needs to be paid attention to and monitored closely.

The second page displays performance over previous time periods of same duration. These calculations are based on same methods at the Team Performance Over Time section of the PIDR. 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.