Therapist Adherence Reports Guide - Using the TAM-R Reports

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

Objectives of the Demonstration:

Today, we will go over the following -

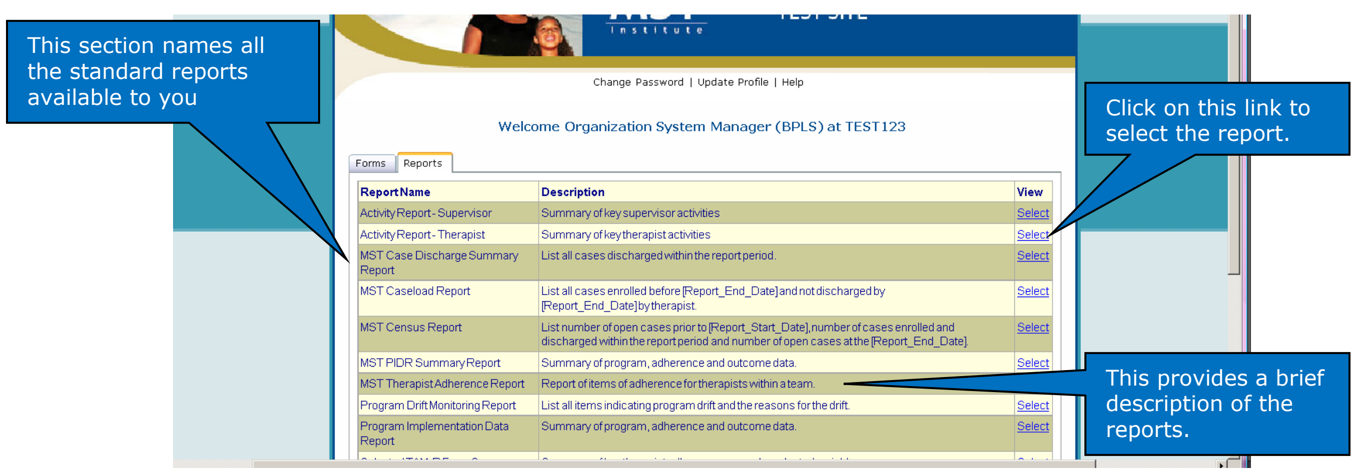
- Monitoring Therapist Adherence
  - TAM-R List Report
  - MST TAM-R Item Report
  - Selected TAM-R Form Score Summary
  - TAM-R Adherence Scores Summarized by Therapist
  - TAM-R Adherence Scores Summarized by Supervisor
  - MST Therapist Adherence Report
  - TAM-R Monitoring Report
  - TAM-R Schedule 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.

Log in as an Organization System Manager on the DEMO site:
Organization System Manager login: osm1/osmdemo1

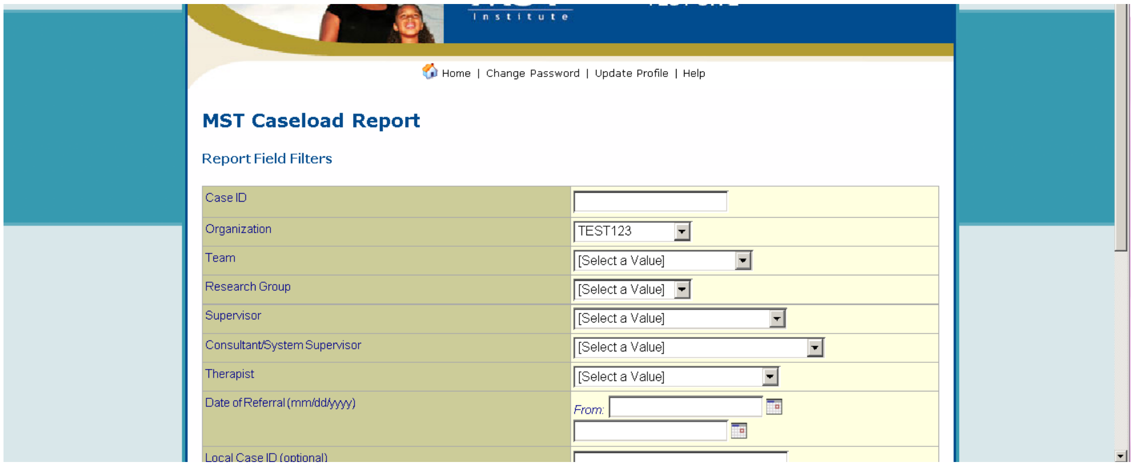
If ever prompted to change the password for this user, please change back to the same exact password as before: osmdemo1

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.

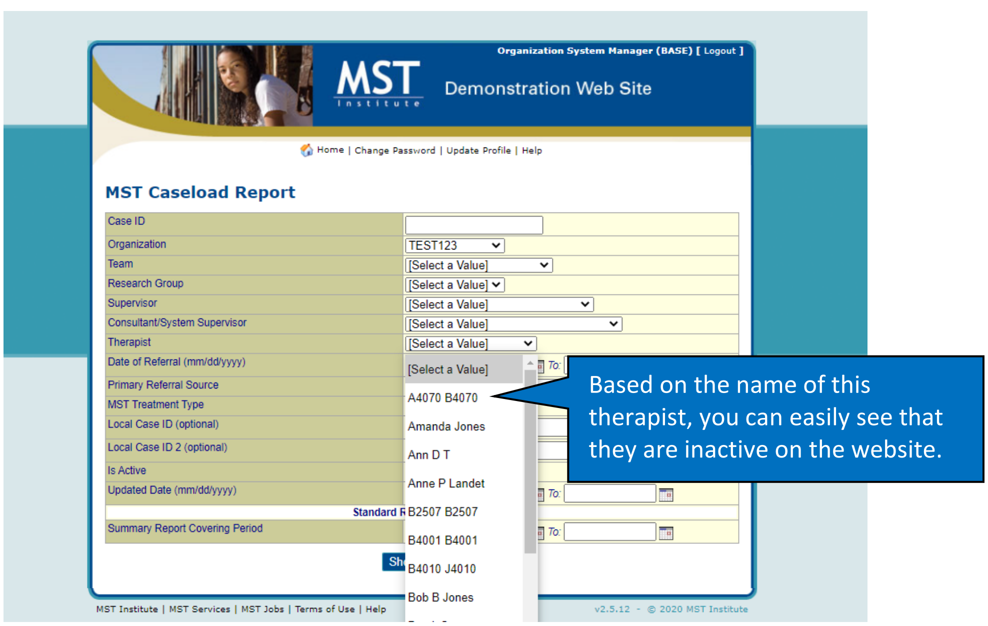


Once a report is selected from the standard report menu, the system will always take you to the **Report Field Filters** screen. The **Report Field Filters** screen allows the user to specify the form, organization, team, research group, etc. he or she wants to report on. Furthermore, the **Report Field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

Example selection screen



Notice that some of the information may be already selected on the **Report Field Filters** screen. This is based on the login code. However, if there are multiple teams, supervisors, or therapists for this organization *(see the drop-down list)* you may prefer to select one in certain fields depending on the type of report you are attempting to run. 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 specific 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 Therapist Adherence

The Therapist Adherence Measure (TAM-R) is a standardized measure that evaluates a therapist's adherence to the MST model as reported by the primary caregiver of the family. The TAM-R is based on the nine treatment principles of MST and is an indicator of therapist adherence shown in several randomized trials to predict youth outcomes.

Information about the TAM-R and how scores are generated is included in the Guidelines for TAM-R Interpretation document which can be found through the **www.msti.org** web page.

TAM-R List Report

To run this report:

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

The **TAM-R List Report,** which therapists DO NOT have access to, provides a list of each TAM-R collected for the selected team, supervisor, or therapist during the date range provided in the **Select Records** screen. This report is very helpful in monitoring the accuracy of the data (e.g., ensuring that duplicate records aren't entered). Some of the data elements included in the list include the TAM-R form ID, the case ID, the Adherence Score, number of sessions in the last week, and if there were no sessions in the last week, the date of last session. The adherence score will range from 0 to 1.00, with a score of 1.00 representing the highest level of adherence. A threshold score of .61 is displayed to indicate the minimum level at which a therapist can be considered adherent to the treatment model.

To reveal the specifics of a particular TAM-R, click on the number in the left column and the complete TAM-R form will open. The **TAM-R List Report** is useful as a way to look for patterns in the TAM-R scores, e.g., a particular family that has scores far below the threshold score (>=0.61). For example, if the first TAM-R collected for a family shows scores far below the threshold, a supervisor might consider observing a therapist's session to identify contributors to low adherence with that therapist and family.

With the results from 12-18 administrations of the TAM-R across families for an individual therapist, the MST supervisor will be able to detect trends in adherence to the treatment model. Patterns of results indicating low or high adherence on particular items can be used to formulate objectives to improve a therapist's performance in these areas.

At boosters, the MST expert and MST supervisor will review TAM-R list and/or **TAM-R Summary Reports** (below). At the MST expert's and supervisor's discretion, results may be shared and discussed with clinicians at the booster or at another time. This process should permit discussion of the therapist's strengths and struggles and contribute to the development of a plan for targeting areas for improvement in the coming months (with specific goals and timeframes attached). The therapist's progress in overcoming struggles would be assessed by future administrations of the TAM-R.

MST TAM-R Item Report

To run this report:

- On the TAM-R List Report you will see a row for each TAM-R collected that meets the criteria selected, in the far-right column click on the "View" link for the individual TAM-R administration of interest.

The **MST TAM-R Item Report** provides a report on an individual TAM-R interview and includes the Adherence Score for this interview, the Threshold Score (>=.61), and lists each item (arranged by level of difficulty) and whether each item is adherent. A single adherence score is generated for each interview. The adherence score will range from 0 to 1.00, with a score of 1.00 representing the highest level of adherence with a threshold score of .61. An item is considered adherent if it is scored as a 5 (i.e., the response of "very much"). This report should be reviewed for those TAM-R interviews in question, by the consultant/system supervisor and MST supervisor at boosters, or with greater frequency.

There are five summary reports that can be used to generate aggregate TAM-R scores. Reports generated at the organization or team level are appropriate for reporting to stakeholders while therapist level reports are useful in development planning. The **TAM-R Form Score Summary Report** allows the user to select a specific set of TAM-R interviews on which to calculate the relevant adherence indicators. For example, a score can be generated for a single therapist for a specific time period.

The other five TAM-R Summary Reports allow the user to display multiple adherence indicators in a single report as indicated below:

- **TAM-R Adherence Scores Summarized By Case ID:** This report will display the average adherence score for each case within the selected variables. Since this report is useful to researchers who may link these results to other data, the Local Case ID is also provided. Unlike the other TAM-R Adherence Score Summary reports listed below, this one includes <u>only</u> cases that have been discharged during the Report Summary Period.
- **TAM-R Adherence Scores Summarized By Organization**: Can generate scores for multiple organizations that the user has access to. For example, an MST expert may have teams in several organizations and has a need to look at the adherence indicators summarized within each organization.
- **TAM-R Adherence Scores Summarized By Team**: This report will display the adherence indicators for all teams within a Network (for network users), within an MST experts workload (for expert users), within a selected Organization, or within a supervisor.
- **TAM-R Adherence Scores Summarized By Supervisor**: Similar to the summary by team, this report will display the adherence indicators for all supervisors within the selected variables.
- **TAM-R Adherence Scores Summarized By Therapist:** Similar to the other reports, this report will display the adherence indicators for all therapists within the selected variables.

Selected TAM-R Form Score Summary

To run this report:

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

The **Selected TAM-R Form Score Summary** lists the Threshold Score, Overall Average Adherence Score, Lowest Adherence Score, Highest Adherence Score, and Percent of Families Reporting Adherence for selected TAM-Rs within the report period. The overall average adherence score is calculated by first averaging all ratings for a particular youth and then averaging the youth scores to obtain an overall mean score. The column "N Complete TAM-R" displays the number of records selected and the column "N Youth" displays the number of youth average scores used to calculate the overall average adherence score. Percent of families reporting adherence is the percent of youth with an average adherence score above threshold. This score provides a measure of consistency of therapist adherence across different cases. This report is helpful in evaluating overall TAM-R scores for a specific team, supervisor, or therapist and can be run for specific periods of time in order to assess change over time.

Run the TAM-R Adherence Scores Summarized by Organization, Team, Supervisor or Therapist Reports

To run these reports:

- Click "Select" for the **desired TAM-R Adherence Scores Summarized report** in the Report Menu
- 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 same adherence indicators will be displayed as they are in the TAM-R Form Score Summary. It will be important for the user to become familiar with each of the reports so he/she will know which one will be able to provide the desired information in the most efficient way.

MST Therapist Adherence Report

To run this report:

- Click "Select" for the **MST Therapist Adherence Report** in the Report Menu.
- On the next screen, select the team of interest
- Check or uncheck those Therapists you want to include in the report.
- 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 **MST Therapist Adherence Report** provides information on the TAM-R for a specific team, specific therapists, and specific periods of time. Included in the report are the number of TAM-Rs, the number of youth with at least one TAM-R, the average Adherence Score, the lowest Adherence Score, the highest Adherence Score, and the percent of youth with average therapist adherence score above threshold for each therapist selected within the report period. Also, all items of the TAM-R are listed according to level of difficulty with the average level of adherence reported (which ranges from "never" to "always") for each of those items per therapist. This report provides a measure of consistency of therapist adherence for each therapist on the team.

Definition of level of adherence reported: The percentage indicates the percent of interviews where the item was rated adherent.

Never = 0%	Sometimes = >25 to 50%	Almost Always = >75 to <100%
Rarely = >0 to 25%	Most of the Time = >50 to 75%	Always = 100%

TAM-R Monitoring Report

To run this report:

- Click "Select" for the **TAM-R Monitoring Report Summary** in the Report Menu
- On the **Report Field Filters** screen, select the team, supervisor, or therapist of interest
- At the bottom of the **Report Field Filters** screen, enter the dates of interest in the Summary Report Covering Period fields. These dates must be from the past for the report to work correctly.
- Click "Show Report"

The **TAM-R Monitoring Report** is designed to look back and monitor past TAM-R data. This means that the date range used should be in the past and the user could run the report through the current date but should not be running it for dates in the future. To look at TAM-Rs due in the future, users should use the TAM-R Schedule report.

The report first displays a table with the total number of due, completed, and eligible TAM-Rs collected per case within the specified date range. Users can view the call windows and TAM-R forms included in the counts of TAM-Rs due and collected by clicking on the "Display call windows" and "Display TAM-r Forms" under each record. Following the team list, a team summary is provided that includes the percentage of completed forms versus the number of forms due and the percentage of eligible forms versus the number of forms due. Finally, the data is summarized for the organization or Network.

<u>All cases must meet the following criteria to be included in the report:</u>

1. The Date of First Visit must be entered on the Case Enrollment Form.
2. The Discharge Date must be ON or AFTER the Report's Start Date.
3. The Case Enrollment Form must NOT be deleted.

<u>"Due" TAM-Rs are calculated when ALL of the following criteria is satisfied/met/ matched:</u>

1. The form's collection window **ends** ON or AFTER the Report's Start Date AND there is no TAM-R completed between call window start date and the Report's Start Date.
2. The form's collection window **starts** ON or BEFORE the Report's End Date AND there is a TAM-R completed between the call window start date and the Report's End Date.
3. The entire call window is within the Report's Start and End Date.

<u>"Completed" TAM-Rs are calculated when ALL of the following criteria is satisfied/ met/matched:</u>

1. The form has NOT been deleted.
2. The form was completed within the Report's Start and End Dates.

<u>"Collected in Window" TAM-Rs are calculated when ALL of the following criteria is satisfied/ met/matched:</u>

1. The form has NOT been deleted.
2. The form was completed within a collection window.
3. The form was completed within the reporting period.
4. The form is the first form completed within a collection window where multiple forms have been submitted for a collection window.

This report helps TAM-R administrators and supervisors track ongoing TAM-R collection and identify families with no or few TAM-Rs completed and can be used by MST experts to assess how often TAM-Rs are being collected for past and current cases. The TAM-R Monitoring Report lists the cases along with the name and phone number of the caregiver and the assigned therapist.

If this report provides evidence that TAM-Rs have not been collected regularly for a particular case, the MST expert and Supervisor should investigate why this is the case. If TAM-Rs have been collected infrequently (for most or all cases belonging to a particular therapist), the MST expert and Supervisor should review the challenges in collecting TAM-Rs for this therapist's families and develop strategies to address the issue. If TAM-Rs have not been collected on a consistent basis for an entire team, the MST expert should work with the Supervisor to develop strategies to address the challenges identified through an analysis of fit.

TAM-R Schedule Report

To run this report:

- Click "Select" for the **TAM-R Schedule Report** in the Report Menu
- On the **Report Field Filters** screen, select the team, supervisor, or therapist of interest
- At the bottom of the **Report Field Filters** screen enter the dates of interest in the Summary Report Covering Period fields. Enter a range for which TAM-Rs are due in the future (It is recommended that a short time period be used to focus just on the families that need to be scheduled soon, e.g., enter today's date for the begin date and 15 days following today's date as the end date)
- Click "Show Report"

The **TAM-R Schedule Report** lists the TAM-R call window beginning and end collection dates, the number of the TAM-R due during the report period (e.g., 1=1st TAM-R due, 2=2nd TAM-R due, etc.), when the last TAM-R was completed and the number of TAM-Rs collected to date. The TAM-R schedule is set according to "The Date of First Visit". The first TAM-R is due two weeks after the first visit date and then is set for every month after that. If the "Date of First Visit" field is left blank in the case enrollment form, the case will not be included in the report. This report also provides enrollment notes for each case to help those collecting TAM-Rs by supplying details such as when the family is most available. This report helps TAM-R administrators plan TAM-R collection and also helps the supervisor track ongoing TAM-R collection and identify families with no or few TAM-Rs completed. To improve TAM-R data collection, supervisors should make sure that therapists inform the family about the purpose of the TAM-R and how they will be collected. More guidance on can be found in the Guidelines for TAM-R Administration document on the MST Institute web site.

The **TAM-R Schedule Report** is based on all cases open on the MSTI Website with a date of first visit and an open call window (includes cases with either a begin or end date that falls in report period regardless of the number of days the window will be open). For example, if the case's End Collection Date is the same day as the Report Begin Date the case will appear on the report even though there is actually only one day left in the call window. Also, a single case might be listed twice if it has two call windows due in the report period. It is suggested that the TAM-R Schedule Report be run every two weeks using the current date as the start date. This will allow for newer cases added to the website after the report is run to be accounted for and for the most up-to-date information to be provided to the organization.

This report is used to:

- Verify that all cases have at least one TAM-R. If a case had a 0 in the last column and there are more than 1 TAM-R due (see line 6 in following example), extra efforts should be made to get at least one TAM-R during the treatment episode.
- Flag cases where there may be an engagement problem (see line 2 in the example report at the end of this document where 4 TAM-Rs are due but only 1 collected
- Determine if a TAM-R needs to be collected for a particular call window by checking to see if there is a completed TAM-R with date completed in the call window (all cases in following example need a new TAM-R since all the dates for last completed TAM-R are before the current window).

Other Report Options

Reports that are helpful in monitoring caseloads, outcomes, and program performance (such as the **Program Implementation Data Report** and the **Program Drift Monitoring Report**) will be covered in another online training, **Program Management and Performance Reports.**

For teams required to follow GDPR standards, this column will be blank as caregiver name is no longer a required field.

Multisystemic Therapy Institute

TAM-R Schedule Report

Report Period: 7/25/2012 - 8/8/2012

Filters: 'Organization' = 'MST'; 'Team' = 'MST Team 1'

Case ID	Local Case ID	Child Name	Caregiver Name	Caregiver Relation-ship	Phone Number	Language	Therapist Name	First Visit Date	Begin Collection	End Collection	Discharge Date	TAM Due	Last TAMR Date Completed	Completed TAMRs
Organization: MST							**Team** [illegible]							
1		Kevin	Jenny	Mother (include adoptive)	999-999-9999	English	[illegible]	[illegible]	012	8/9/2012		6	7/17/2012	5
Case 1) Enrollment Note:														
2		David	Myrtle	Mother (include adoptive)	999-999-9999	English	Jane	[illegible]	012	7/30/2012		4	5/2/2012	1
Case (2) Enrollment Note:														
4		Paige	Douglas	Father (include adoptive)	999-999-9999	English	Kevin M	4/25/2012	8/7/2012	8/21/2012		4	6/13/2012	2
Case (4) Enrollment Note:														
5		Jacob	Julie	Mother (include adoptive)	999-999-9999	English	Jane M	5/9/2012	7/22/2012	8/5/2012		3	7/6/2012	2
Case (5) Enrollment Note:														
6		Michaela	Paula	Mother (include adoptive)	999-999-9999	English	Kevin M	6/15/2012	7/29/2012	8/12/2012		2		0
Case (6) Enrollment Note:														
7		Leah	Melvena	Grandmother	999-999-9999	English	Jane M	7/23/2012	8/6/2012	8/20/2012		1		0
Case (7) Enrollment Note:														

For teams required to follow GDPR standards, this column will be blank as phone number is no longer a required field.