# MyOutcomes®

# User Guide
## VERSION 20

The Gold Standard Outcome Tracking
& Reporting System

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# CHAPTER 1
## Privacy & Security in the Technological Age

The Electronic Age has brought with it many opportunities. Psychotherapy, especially psychotherapy that's built around feedback-informed treatment, has richly benefited from much of this new technology. Using these technological advancements, MyOutcomes® has built a large database for establishing normative data that helps therapists predict the treatment course for each of their clients and make critical adjustments to their treatment plans when needed.

Like any technology, however, computers and mobile devices with their interconnectedness may have vulnerabilities that can potentially expose us to the darker side of the technological world. Personal information, by necessity, is collected and stored on these devices. Programs and large amounts of data are stored on servers. Information is transmitted between the servers and our personal devices. Because they are points of vulnerability, storage and transmission of data are security concerns. Although most of us are honest, there are those who aren't. Given access, they will exploit these various vulnerabilities to hack into our electronic devices and steal or ransom our personal information. If that weren't sufficient, there are others, who are nothing more than vandals looking to access and damage our systems simply to show that they can.

Although these security and privacy risks exist, increased awareness, prudence and technological savvy can go a long way towards keeping the vandals and thieves from the gates. MyOutcomes® takes the protection of client private information and personal data very seriously. MyOutcomes® has worked diligently to master the security and privacy regulations in the various countries where MyOutcomes'® customers may practice. Not only is MyOutcomes® HIPAA (Health Insurance Portability and Accountability Act of 1996) compliant, but MyOutcomes® is compliant with PIPEDA (The Personal Information Protection and Electronic Documents Act), as well as the security and privacy measures of the European Union and the United Kingdom.

To continually monitor the state of compliance, MyOutcomes® has partnered with Compliance Helper, a powerful tool that helps a company keep its HIPAA policies, procedures, and other documentation up-to-date. Compliance Helper's meters allow customers to see at a glance how compliant MyOutcomes® is with its procedures, policies, forms, and regularly scheduled tasks.

But MyOutcomes® is not content with simple compliance. Good security is the key to protecting your privacy. The security strategies that MyOutcomes® uses are far more cutting edge than what is usually found in a company of comparable size. Even with this level of security, MyOutcomes® is far from content. MyOutcomes® is always looking ahead, ready to integrate the next generation of security that will protect your data. Not only is MyOutcomes® the pacesetter in offering technologically sophisticated tools and support to therapists who believe in evidence-based, feedback-informed practices, but MyOutcomes® is also at the forefront of those companies that are HIPAA compliant.

Of course, security and privacy are only as good as the MyOutcomes'® users make it. Those willing and eager to exploit these systems are not only found using the internet to do so. To protect the privacy of your clients, it is recommended that any device screen is positioned in a manner that makes it difficult for prying eyes to see. If others have access to your device(s), MyOutcomes® also recommends not storing your user id and/or password for automatic login. It is also recommended that you logout of MyOutcomes®, if you aren't using it or when you leave your desk.

**Warning: It is a good habit to logout of MyOutcomes® whenever you aren't using it. Remaining logged in can make your account vulnerable to exploitation if you should leave your device unattended.**

In an age filled with so much uncertainty, MyOutcomes'® existing customers and potential customers can be certain of two things that set MyOutcomes® apart. First, the security and privacy of your clients' personal information is as important to us as it is to you. Second, MyOutcomes® is prepared to do everything that is needed to ensure personal information remains secure and private.

# CHAPTER 2

## The Basics

### 2.0      Accessing MyOutcomes®

MyOutcomes® is accessible on any computer, laptop, tablet, or smartphone that has internet access. MyOutcomes® Version 20 supports the following browsers: Edge, Firefox (latest version), Google Chrome (latest version), Safari (latest version), iPad/iPhone, and Android.

This section provides details about how to access MyOutcomes®, as well as change and recover passwords. It also provides an overview of the Home Page once you have logged in, user types and user access.

**Note: To use our Frequently Asked Questions section, please follow this link:**

**https://www.myoutcomes.com/faq**

### 2.1      Log in:

To log in for the first time, look for two time-sensitive emails from clientcare@myoutcomes.com. The first one, "Your New MyOutcomes® Account", contains your User ID. The second, "MyOutcomes® Access", contains a link for you to create your new MyOutcomes® password.

When you click on the link in the email, you will be taken to a web page and asked to enter your User ID. You will then be asked to set a password. Passwords need to be a **minimum of seven characters** and contain at least one uppercase letter, one lowercase letter, one number, and one symbol (! @ $ % ^). Passwords that do not follow these format restrictions will not be accepted.

**Tip: Bookmark your login page, so that you can access it directly from your phone, tablet, laptop, or PC.**

### 2.2      Forgotten Passwords & User IDs:

There are two ways to recover lost passwords.

On the login page, you will find the **Forgot Password** link underneath the User ID and password entry boxes. When you click on this link, you will be brought to the Forgot Password page. Enter your User ID and the email address associated with your account. (If you don't know your username, use the **Forgot User ID** link on the login page to recover your ID). After entering your username and email address, click the send icon. A time-sensitive email will be sent to your email address with the instructions on how to reset your password.

**Alternatively**, supervisors (or administrators & owners) can assist providers (or other users) in recovering their user ID and/or password. After logging in, they will need to navigate to the user's Home Page. Click on the **Update <User>** link found in the upper-left corner of the page. On the Update <User> page, the supervisor has the option (upper-left corner) to an email with the user ID and/or a time-sensitive email with instructions on setting/resetting the password to the user. Make certain that the user's email and contact name is up-to-date before sending the emails.

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**Note:** When entering user IDs, passwords and email addresses, they need to be entered exactly as seen. As it is possible to 'grab' an empty character when copying, it is recommended that user IDs, passwords and email addresses be manually entered.

**Note: The Update <User> page can be accessed via the drop-down menu in the Tree Directory as well.**

**Tip: Owners, administrators, and supervisors can reset the password and send user id to users lower in the hierarchy by navigating to the appropriate user list in the main viewing area. Left click the radio button to the left of the user ID and then select which action is desired in the drop-down menu at the bottom of the list.**

**Note:** The initial link for setting a password that is sent by the system when an account is first provisioned expires after 7 days. Later links that are sent by owners, administrators or supervisors expire after 24 hours for security purposes. If the user will not be available to set/reset their password during that time, it is recommended that the user use the Forgot Password link found on the MyOutcomes login page.

## 2.3      Additional Security Features

As part of MyOutcomes' attempt to assist customer needs to meet regulations for ever increasing security and privacy, we have added three features, one optional and two non-optional, to that end and that are becoming industry standards.

1) Non-Optional:
   a. Provider accounts will be prompted to change their passwords every six months. The new password cannot be one that was used in the last two iterations.
   b. Automatic logout following two hours of inactivity for both the web app and the mobile app.
2) Two-Factor Authentication: This security feature is turned on at the owner level. For an individual to use this feature, they will need a device that can receive the code via a text message, e.g. smart phone. Once a device is registered, there shouldn't be a need for two-factor authentication again on that device. Major OS upgrades may require re-registering the device.

## 2.4      MyOutcomes® Home Page:

Logging into MyOutcomes® lands you on your **Home Page.**

**Note: Access to FIT eLearning will be found in the Upper Navigation Menu.**

There are three main viewing areas on your home page: **Tree Directory, Main Content View Area,** and **Upper Navigation Menu.**

**Tree Directory:** The Tree Directory (on the left side of your screen) allows you to set up the application to mirror your organization's structure. It enables client administration and data analysis at different levels of your organization.

**Main Content Viewing Area (Console):** Located on the right-hand side of the screen is the **Main Content Viewing Area (MCA) or user console**, most functions that are performed in the Tree Directory can also be performed from the MCA. By default, the MCA displays the user's Home Page. Aggregate statistics, administration of patient surveys, patient data, and other reports are accessible in this area.

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**Upper Navigation Menu:** The white tabs along the top of the screen comprise the Upper Navigation Menu and provide access to additional resources and training opportunities. There are also tabs to access a contact page where you can request support or provide us with feedback, as well as a link to this guide. The tab towards the far right accesses the Dashboard. The Dashboard allows you to generate reports, including Key Performance Indicators (KPI), Case Alerts, and ORS Audit. If you have signed up for Feedback Informed Treatment (FIT) eLearning, the tab for opening that program will be found to the right.



## 2.5     Using the Tree Directory:

The Tree Directory is organized to help you find, manage, and update records. Each user has a unique directory view determined by their level of access.

The Tree Directory can be used to perform functions in MyOutcomes® or it can be hidden from view. Remember, most all functions that are performed on the Tree Directory can also be performed from the user's Home Page or the Client Console in the MCA.

Note: A user's view of the Tree Directory is determined by their level of access.

## 2.6     Expanding and Collapsing the Tree Directory:

The user's name appears at the top of the Tree Directory upon logging in. Clicking on the triangle symbols by the usernames will expand and collapse the Tree Directory.

## 2.7     Hiding the Tree Directory:

The Tree Directory can be hidden so that only the Main Content Viewing Area and the Upper Navigation menu are visible. This is useful when using a smartphone or tablet to maximize the size of

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the viewing screen. It is also recommended when administering the ORS & SRS to clients, so that they cannot view a provider's caseload information.

Hide the Tree Directory by clicking on the red circle with an "x" symbol located at the upper left of the Tree Directory. Show the Tree Directory again by clicking on the green circle with the "+" symbol at the upper left of the user console.

## 2.8    Displaying Inactive Clients or Closed Treatment Episodes:

Active clients are displayed as the default view. Check the Show Inactive/Closed box on the upper left of the Tree Directory to view inactive clients and previous client episodes of care. On the tree, the font for inactive and closed episodes of care is light grey and italicized so they can be easily distinguished from active clients.

## 2.9    Drop-down Menu on the Tree Directory:

Right click on the user ID in the tree to produce a drop-down menu from which several actions can be initiated. Depending on the user access level, available actionable items include **Find Client, Update <user>**, as well as **Create New <user>, Deactivating/Reactivating, Transferring** and **Deleting** functions. To use any of these, click on the desired menu item and follow the prompts that appear in the main viewing screen to complete the action. Remember, most all actions can also be accessed from the console.

## 2.10    User Types

**Owner** is the name of the default Owner account. The owner account is automatically set up and cannot be changed by account holders. Logging into MyOutcomes® as the owner gives access to all of the other user levels.
**Note: If the owner of the account needs to be changed, please contact Customer Support by filling out a customer support ticket found at: http://www.myoutcomes.com/contact-us. Owner change requests need to originate with either the current account owner or the current Billing Contact.**

**Administrator** refers to those who oversee supervisors and providers. Logging in as the administrator provides access to all user levels below that particular administrator's level. While there has to be at least one administrator, multiple administrators can be added without affecting the subscription fee. In the case of multiple administrators, one administrator cannot access another administrator's information or the information of the supervisors and providers that another administrator manages.

**Supervisor** refers to those who oversee and supervise providers. There can be an unlimited number of supervisors above the required minimum of one. Supervisors have access to their own information and the information of the providers under their supervision, but cannot see another supervisor's providers or clients.

**Providers** refers to those working directly with clients. Providers have access to their own statistics and their own client files. They cannot see another user's statistics or clients.

**Clients** are added to a **Client Group** that is managed by the provider. Each client can belong to only one Client Group (see Chapter 5) in MyOutcomes®. Therefore, if a client receives multiple services or sees multiple providers, a decision will need to be made as to which provider and Client Group to list the client under.

## 2.11   User Access

Each user's tree view will look different depending on their role assignment. For example, the account "Owner" can view their Administrator, Supervisor, Provider, and Client information from their tree view, whereas "Administrators" can only view information pertaining to their Supervisor(s), Provider(s), and Client(s). "Supervisors" can view Provider and Client information, while "Providers" are restricted to viewing their "Client" information.

As with the Tree View, a user can only navigate through those organizational levels below their role. The **Up to <User> Home** link in the upper-right corner can be used to return the user to their home screen.

### Owner:

The owner has the highest level of access. Owners can view and update information at the Owner, Administrator, Supervisor, Provider, or Client level. The owner can also add, transfer, or delete Administrators, Supervisors, Providers, Client Groups, and Clients, both active and inactive/closed. Owners have the ability to select from a range of options for termination of service.

### Administrator:

Administrators can view and update information at the Administrator, Supervisor, Provider, or Client level. The administrator can add, delete, or transfer Supervisors, Providers, Client Groups, and Clients, both active and inactive/closed.

Administrators only have access to the data for the Supervisors and Providers that they oversee.

### Supervisor:

The supervisor can add or delete providers, client groups and clients, as well as transfer client groups and clients, both active and inactive/closed to other providers that they supervise.

Supervisors only have access to data and reports for the providers and their clients that are under their supervision.

### Provider:

The provider can add or delete client groups and clients, as well as change the survey language and suppress feedback messages.

Providers only have access to data and reports for their own clients.

### Clients:

Clients can score the Outcome Rating Scale (ORS), Child Outcome Rating Scale (CORS), Session Rating Scale (SRS), Child Session Rating Scale (CSRS) and/or Group Session Rating Scale (GSRS), electronically or enter paper and pencil scores manually.

Clients can view a graph of their progress and, if their provider chooses, the Feedback Signals resulting from their ORS and SRS scores. They can also compare ORS and SRS scores for various sessions, as well as view a summary of their progress.

## 2.12     Logging Out:

When leaving the website, make sure you sign out by clicking the logout button on the upper right hand of the web page.

# CHAPTER 3

## Owner's Tools

### 3.0      Owner's Tools

The owner is able to access and review information and data of all administrators, supervisors, providers, and clients. Information can be accessed individually or in an aggregated format.

The owner can also add, transfer, or delete administrators, supervisors, providers, client groups, and clients, both active and inactive/closed.

### 3.1      Adding or Updating Users:

The owner cannot add a new owner, but does have permission to edit owner information, including changing passwords, changing company name, adding/changing a phone number (for two-factor authentication), e-mail addresses, setting default language for surveys, setting default to display or not display feedback messages and setting default date format.

These functions can be accessed via the drop-down menu on the tree or on the Owner Home by using the Update Owner link.

Updating and adding new administrator accounts is performed at the owner level.

### 3.2      To Update User Information:

Right click on the user name on the Tree Directory or navigate to the user name via the MCA and click on it.

Select **Update <User>** (owner, administrator, provider, client group, client) from the drop-down menu.
On the Home Page, the **Update <User>** link is found in the upper-left corner of the console.

Make changes in the form that appears in the MCA and click the Update <User> button at the bottom of the page. Access to updating the email address and username is gained by clicking the link in the top left of the console page.

Once the action is completed, a message box will appear advising you that the user information was successfully updated.

If you decide not to make any changes, clicking the **Return To <User> Home** in the upper-right corner will return you to the user's page.

### 3.3      To Add Users:

Users can only add users with a lower level of access than themselves.

Right click on the user ID in the tree or click on the ID in the console.
Select **Create New <User>** (administrator, supervisor, provider) from the drop-down menu or click on the **Create <User>** link on the right of the Console.

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Fill in the form that appears in the MCA. The User ID and email address are required. Click on the Create <User> button at the bottom of the page.

Once the action is completed, a message box will appear advising you that the user was successfully created.

Clicking on the **Return to <User> Home** in upper-right corner of page at any time before creating a new user will exit the create page, without creating a new user, and return you to the user's page.

## 3.4    Transferring Users:

The ability to transfer users depends on the user's level of access. Owners can transfer supervisors to another administrator, providers to another supervisor, and clients to any provider in the account. Both active and inactive/closed clients can be transferred.

Tip: The higher the level of transfer, the more inclusive the amount of data transferred will be. For example, transferring a client transfers the client data. Transferring a Client Group will transfer all clients, active and inactive. Transferring a provider transfers all Client Groups. Transferring supervisors will transfer all of their providers accounts.

## 3.5    To Transfer Users:

In the Tree Directory or on the console, navigate to the appropriate list of administrators, supervisors, or providers. To transfer clients, navigate to the relevant Client Group. Right-click the appropriate user ID in the tree or left click the radio button in the Select column on the same row as the user's ID.

From the drop-down menu on the Tree Directory, select **Transfer <user>** or from the primary user's Home Page select Transfer in the Select Action drop-down menu located at the bottom of user ID list.

In the Transfer User dialogue box, select which administrator, supervisor, provider or Client Group you wish to transfer the user to.

Confirm your selection to complete the transfer.

## 3.6    Deactivating Users

The owner can access functionality for deactivating their providers (see section 4.7). Likewise, they can deactivate client accounts (see section 5.12).

## 3.7    Deleting Users:

The owner is able to delete administrators, supervisors, and providers. Clients also can be deleted, however, when a client is deleted, the client and all of their data is deleted from the system.

**Warning:** Because all their data will be deleted, clients should not be deleted from MyOutcomes® unless they were entered in error. Likewise, deleting any individual without transferring the data below them will result in loss of all that data, e.g. if you wish to delete an administrator, transfer supervisors, providers, Client Groups and clients, active and inactive, beforehand or their data will be lost.

## 3.8    Service Termination Options:

Owners have the ability to select from a range of options for termination of service. To select reasons for termination, click the <Option> link located at the top of the owner's page. Click <Save> to commit the selection.

**Tip: The owner is able to add additional reasons at any time. Owners are also able to remove reasons provided they haven't been used for deactivated clients.**

## 3.9        Tags:

For agencies with different areas of specialization, the Owner can also create Tags to help separate clients based upon predetermined characteristics for analysis and filtering in reports. Click on the **<Tag List>** link at the top of the Owner Home Page and then click on the **Create New** link to enter and save names for the Tags.

Tags can be entered when creating a client account. They can also be used to update clients that are active or inactive.

Tags are by default alphabetically listed. Organizations that have more than a handful of tags may want to be able to sort the tags so that the most commonly used are at the top of the list, while the least commonly used are at the bottom. This can ease the process of adding tags to client accounts and selecting tags for reporting. To list the tags in a manner that accommodates the needs of the organization, when creating or editing a tag, enter the numeric position that you want the tag to appear in. For example, if you wish the tag *Affective Disorder* to appear 8th in a list of eleven, type an 8 in the **Sort Order** box.

**Note: Owners are able to update an information for an inactive/closed client account. Administrators, supervisors, and providers are only able to make adjustments to the Tags for inactive/closed client accounts.**

Tags can be used in the Aggregate Stats and the Dashboard to view or compare information for specific subpopulations, whose data have been determined to be of interest for tracking.

## 3.10       Customize your Aggregate Stats Report:

Owners have access to aggregate data for the whole organization, access to individual client results and everything in between. Some metrics are optional for the Aggregate Stats report. Selection of these metrics is accomplished on the owner's Home Page by selecting the **<Options>** link found at the top of the page.

The owner can customize the Aggregate Statistics reports in two ways.

1. The owner can select which specific recovery metrics, e.g. Total Sessions, Relative Effect Size, % of Clients Reaching Service Targets, etc., to include for customized Aggregate Statistics reports. To select metrics, click on the <Option>. Select the boxes of all the metrics to be included and then click <Save> to commit the selection.

2. For those whose progress and/or reporting terminology differs from that of MyOutcomes® default language, the owner has the option of editing the language used in the reports.

**Options**

| ID | Enable | Item | Value (when applicable) |
|----|--------|------|-------------------------|
| 1 | ☐ | Overall Change | |
| 2 | ☐ | Change vs. Session Targets | |
| 3 | ☐ | Change vs. Service Targets | |
| 4 | ☑ | Sessions | |
| 5 | ☑ | Time and Treatment | |
| 6 | ☐ | Recovery | |
| 7 | ☑ | Clients | |
| 8 | ☑ | Discharged | |
| 9 | ☐ | Change Index | 6 ⌃⌄ |
| 10 | ☑ | Validity Indicators | |
| 11 | ☐ | Lock ORS/SRS after [In Days] | 28 ⌃⌄ |
| 12 | ☑ | Demographics | |
| 13 | ☐ | Hide Session Notes | |
| 14 | ☐ | Hide SRS | |
| 15 | ☑ | Check Names on Create | |
| 16 | ☐ | Custom ORS Feedback | |
| 17 | ☐ | Don't retain client email addresses | |
| 19 | ☐ | Lock Deactivation after [in days] | 5 ⌃⌄ |
| 22 | ☐ | Enable Two Factor Authentication | |
| 23 | ☐ | Alternate terminology for "therapist" | |
| 24 | ☑ | Enable Client Single Sign On | |

Note: If you have demographics enabled with data entered, if you later disable demographics the extra demographic data can be lost.

In-line editing enables you to change the terms used for describing program metrics, making them more relatable to your audience. To maintain consistency across your reports, the edit feature will only be accessible from the MyOutcomes' owner level Aggregate Stats page (Click **Owner/Agency Stats** link). To maintain data integrity, the roll-over definitions of the statistical terms are standardized for consistent reporting across all MyOutcomes' user levels.

To edit terms, right click term on the Aggregate Stats page. An edit function will appear. Make alterations and then click the check mark to save.

**Note: MyOutcomes® calculations/algorithms are not altered.**

## 3.11      Company Name

The owner can enter the company name in the account.

Click on the **Update Owner** link at the top of the Home Page. Enter the company name into the box and click the Update Owner link at the bottom of the page.

## 3.12      Demographics Option

It is possible to enter more demographic information about the client than the essential information needed by MyOutcomes®. The decision to enter more demographic information is made at the owner level. To activate this function, click on the **Options** link at the top of the Home Page. Check the

Demographics option box. When a client account is created, more information may now be entered. There will also be available a section for including relevant notes.

**Warning:** If you have enabled Demographics and then later disable it, any demographic information that was originally entered may be lost if the Demographics function is activated again.

## 3.13    Limiting Changes to ORS/SRS data

If it is decided to limit how long post-session that survey scores can be changed, this can be accomplished at the owner level.

Click on the **Option** link found at the top of the Home Page. Check the box for **Lock ORS/SRS after (in Days)** option. Then select the number of days in the **Option Value** column. The ORS/SRS scores will be locked, i.e. unalterable, after the number of days selected have passed.

## 3.14    Session Notes

It is possible to add and export encrypted lecture notes.

This feature can be turned on or off in Options.

## 3.15    Check Name function

The check name function is to be used when creating clients-as a check to see if the client is already in the agency. It is a tool to reduce duplicate client records in the system. Login as Owner and go to Options. Enable the Check Names On Create option.

## 3.16    Hide "Remember Email" on Give Access

To hide the Give Access option to remember clients email, login as Owner; on the Owner Home Page, click on Options. Enable Hide Remember Email on Give Access.

## 3.17    Reactivating Clients Standardization

A question that may arise is when to reactivate a client as a continuation of a prior episode and when to reactivate as a new episode of care. Each agency will need to make that clinical decision based upon their requirements. To assist agencies in standardizing the decision, owners can activate **Lock Deactivation after (in days)** under Options and then select a time period.

## 3.18    Two-Factor Authentication

As an additional layer of security, the owner can have **Two-Factor Authentication** enabled in Options. Two-Factor Authentication will require users to enter a security code the first time that they log into their MyOutcomes on a specific device. The security code is randomly generated by the system and will be sent via a text message to the phone number that has been entered into the user profile.

**Note:** Extensive updates of a devices operating system may treat a previously used device as being new, so a new security code will need to be entered.

**Note:** Older accounts will need to update their user accounts with the user's mobile phone number in order to take advantage of this feature.

## 3.19 FIT eLearning

You can now manage your FIT eLearning subscriptions in a similar manner as you now manage the provider licenses. Either while provisioning or updating a provider account, you will see the option for giving them FIT eLearning. After checking the box, the provider will see the additional FIT eLearning tab at the top of their page after they have logged into the provider account. Clicking that tab will take them into the learning environment.

On the Owner Home page, at the top of the console, there is a link titled **FIT eLearn Dashboard**. On the page that opens after clicking on this link, there will be a list of all of your staff that has access to FIT eLearning as well as a report of their progress towards completion of the 12 lessons.

When you have used all of the subscriptions that you have purchased, you will receive a message if attempting to give FIT eLearning access to additional staff.

## 3.20 SRS Script Customization

Currently, the word 'therapist' is used in the SRS script. For those accounts that prefer to use a different term, e.g. provider, they can make this alteration by logging in as the owner and entering **Options**. Select **Alternate Terminology for "therapist"**. A text box will open. Enter the term that is preferred and save. That term will appear now replacing 'therapist' in the SRS script for all users in your agency.

# CHAPTER 4

## Administrator & Supervisor Tools

Owners and administrators can often be the same individual. If you are an owner administrator, use Chapter Three instead of this one.

### 4.0 Administrator:



The administrator can edit their information and can add, update, or delete, supervisors and providers, as well as transfer providers, client groups, and clients, both active and inactive/closed. These functions can be accessed via the drop-down menu on the tree or on their Home Page.

Administrators only have access to the data for the supervisors and providers that they oversee. As such, they can generate reports that include the data of all supervisors or of individual supervisors and/or providers.

### 4.1 Supervisor:
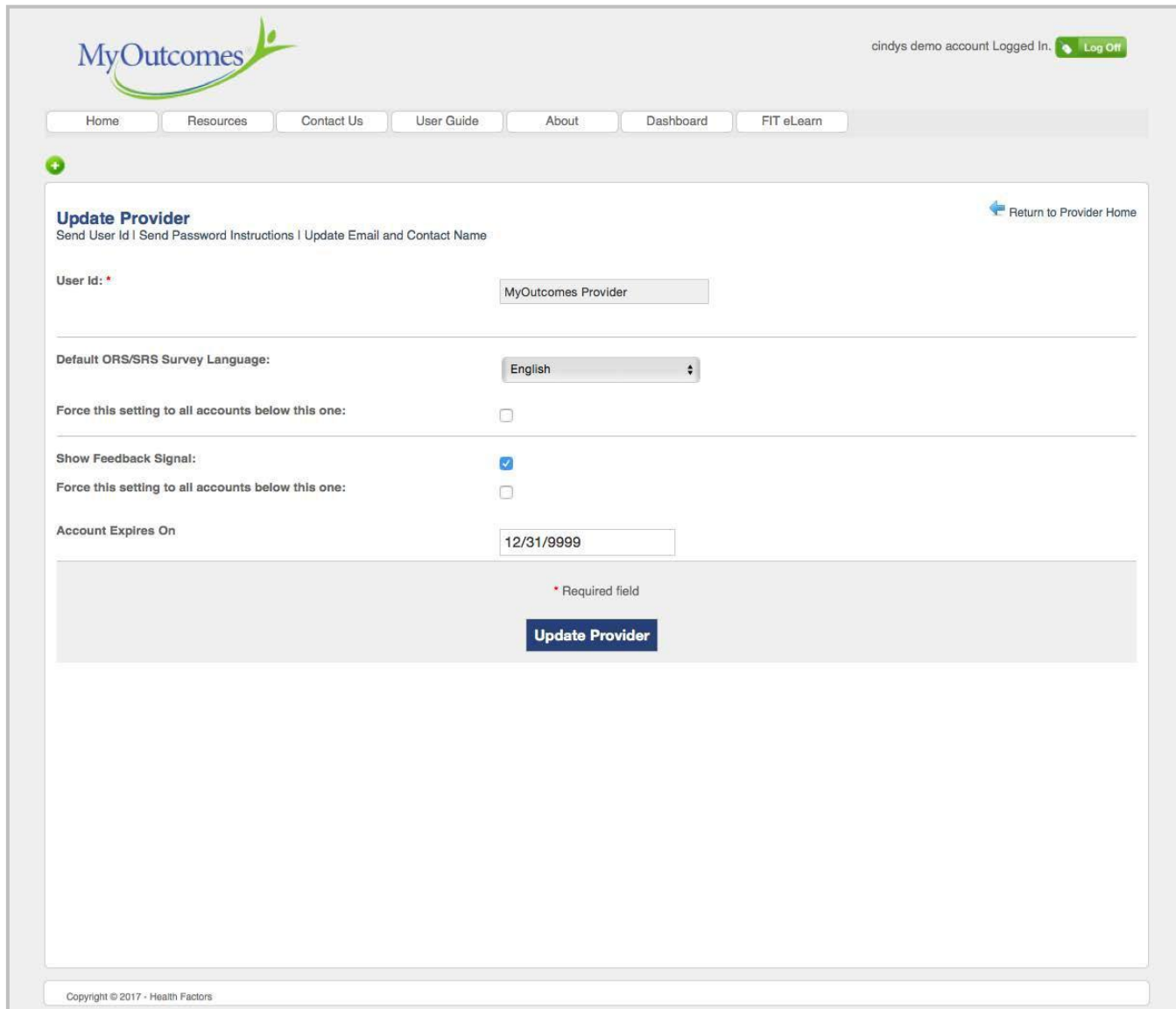
The supervisor can edit their information and can add, update, or delete providers, as well as transfer Client Groups and clients, both active and inactive/closed, to other providers they supervise. These functions can be accessed via the drop-down menu on the tree or on the Home Page.

Supervisors only have access to data and reports for the providers and their clients that are under the supervisor's supervision.

## 4.2     Read-only access for Administrators and Supervisors

Read-only can create AND update any user at any level beneath them. They cannot delete anything beneath them. They cannot perform any ORS/SRS or skip any sessions or update any past sessions.

## 4.3     To Update User Information:



Left click on the user name in the Tree Directory or navigate to the user name via the MCA and click on it.

Select **Update <User>** (supervisor, provider, Client Group, client) from the drop-down menu (right-click). On the Home Page, the **Update <User>** link is found in the upper-left corner of the console. For Client Groups, select the **Manage Groups** found in the center of the page.

Make changes in the form that appears in the MCA and click the Update <User> button at the bottom of the page. You can update the email address and username by clicking the links in the top left of the console page.

Once the action is completed, a message box will appear advising you that the user information was successfully updated.

If you decide not to make any changes, clicking the **Up to <User> Home** in the upper-right corner will return you to the user page.

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## 4.4    To Add Users:

Users can only add users with a lower level of access than themselves.

To add a user, navigate to the user level just above the level you wish to add a user. For example, if you are the administrator and you wish to add a provider, you need to first navigate to the supervisor who will oversee the provider's work. (If you are the supervisor, of course, you will be able to add a provider from your Home Page.) Right click on the user name in the tree or click on the name in the console.

Select **Create New <User>** (administrator, supervisor, provider) from the drop-down menu or click on the **Create <User>** link on the right of the MCA.

Fill in the form that appears in the MCA. The User ID and email address are required. Click on the Create <User> button at the bottom of the page.

Once the action is completed, a message box will appear advising you that the user was successfully created.

Clicking on the Return to <User> Home in upper-right corner of page at any time before creating a new user will exit the create page, without creating a new user, and return you to the user page.

## 4.5    Transferring Users:

The ability to transfer a particular user depends on the user's level of access. Administrators can transfer providers to other supervisors, as well as transfer Client Groups and clients to providers listed under any of the supervisors that they oversee. Supervisors can transfer Client Groups and clients to any of the providers that they supervise. Both active and inactive/closed clients can be transferred.

**Tip: The level you transfer determines the amount of data that will be transferred. In other words, if you transfer a client, only the client data is transferred. If you transfer a Client Group, all clients in that group, active and inactive, will be transferred. Transferring a provider will transfer all of the Client Groups as well.**

## 4.6    To Transfer Clients:

**Transfer Client**

**You are transferring Client: Joine**

Administrator:    Select...

Supervisor:

Provider:

Client Group:

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In the Tree Directory or on the Home Page, navigate to the appropriate list of supervisors or providers. To transfer clients, navigate to the relevant Client Group. Highlight the appropriate user ID in the tree or left click the radio button in the Select column on the same row as the user ID.

From the drop-down menu on the Tree Directory (right-click), select **Transfer <user>** or from the primary user's Home Page select **Transfer** in the Select Action drop-down menu located at the bottom of user ID list.

In the Transfer User dialogue box, select which supervisor, provider, or Client Group you wish to transfer the user to.

Confirm your selection to complete the transfer.

If you wish to transfer an account for a client that has been deactivated, but can't see it, you will need to check the box for Show Inactive/Closed at the top of the tree view. Inactive and closed client cases will appear in light grey, italicized font.

**Tip: When transferring individuals or groups, all data below that level will be transferred. For example, transferring a Client Group will also transfer all clients, active and inactive, in the group.**

## 4.7      Deactivating Providers

Like clients, you can deactivate provider accounts. Deactivating provider accounts frees one of your provider licenses, while retaining the client data in the provider account.

You can transfer Client Groups and client accounts before or after a provider account has been deactivated.

Deactivating a provider account will not deactivate any client accounts. If there are active client accounts, you may wish to transfer them to another provider.

To deactivate a provider account, right-click the provider's user ID in the tree view. From the drop-down menu, select **Deactivate Provider**. Complete the form.

If the provider returns, you can reactivate the provider account.

## 4.8      Deleting Clients:

Administrators are able to delete supervisors, providers, Client Groups and clients. Supervisors are able to delete providers, Client Groups and clients. When a client is deleted, the client and all of their data are deleted from the system.

**Warning:** Because all their data will be deleted, clients should not be deleted from MyOutcomes® unless they were entered in error.

**Tip: When deleting individuals or groups, all data below that level will be deleted. For example, deleting a Client Group will also delete all clients, active and inactive, in the group. Before deleting supervisors or client groups, transfer clients, active and inactive, first. Provider accounts can be deactivated, leaving available all data in the account.**

# CHAPTER 5

## Provider's Tools

### 5.0    Provider 's View



The provider has two mechanisms to view their Client Groups and clients. In the tree view, clicking on the triangle will open a list of Client Groups. Clicking on the triangle for any Client Group will open a list of clients in that group. Alternatively, the provider can use their Home Page to view their Client Groups and clients. Aside from a number of actionable items, the console provides a brief review of each client: client type (individual, couple, or group), client ID, Client Group, date of last session, next survey type, and, at the end of each row, the client's current status.

At the bottom of the list, the provider has an option of choosing how many clients are displayed on each page. The default is 10, however, the provider is able to customize their view by selecting a larger number if they desire. The provider's selection will be maintained until the provider changes it.

Note: Customizing the number of clients per page uses cookies. This means that customization is retained only on the computer it was created on. Other devices will display the default.

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## 5.1      Adding or Updating Users:

The provider can edit their information, create/update Client Groups, and update or add clients.

These functions can be accessed via the drop-down menu on the tree or on the Home Page.

## 5.2      To Update User Information:

Providers can update their information by clicking on the update link found in the upper-left corner of the console. Alternatively, they can right click on their ID in the tree.

To update Client Groups from the console, click on Manage Groups link and then select which group is to be updated.

To update clients, left click on the client ID in the Tree Directory or navigate to the client's ID in the main console and click on it to go to the client's console.

Select **Update <User>** (Client Group, client) from the drop-down menu. On the console, the **Update <User>** link is found in the upper-left corner of the console.

Make changes in the form that appears in the MCA and click the Update <User> button of the page. Access to updating the email address (provider) and username is gained by clicking the link in the top left of the Console page.

Once the action is completed, a message box will appear advising you that the user information was successfully updated.

If you decide not to make any changes, clicking the **Up to <User> Home** in the upper-right corner will return you to the user's page.

**Note:** If you need to update multiple clients with the same tag, rather than updating them one at a time, you can update them simultaneously. To do so, check the boxes under the Select column on your client list. Navigate to bottom of the client list and from the Select Action drop-down menu, choose **Assign Tags**. On the page that opens, select all of the tags that apply.

## 5.3      To Update Inactive/Closed Cases

If there is a change in the use of Tags, this change can be easily extended to Inactive/Closed cases. Navigate to the console of the inactive or closed client case. Click on the **View Client** (on console) or **Update Client** (Tree drop-down menu) link found. Make changes to Tags as needed and click the **Update Client** icon at the bottom of the page.

## 5.4      Client Groups:

Client Group identifies a caseload or set of clients and is used to organize clients within a caseload. Each provider must have at least one Client Group in their directory (caseload) and can add as many Client Groups as needed to reflect their caseload population. For example, they may have a group for one-on-one clients, a group for clients receiving group therapy, and a group for clients receiving couple and family therapy. Separating a caseload into Client Groups allows provider data to be pulled from different client populations when reviewing data in the Dashboard.

Providers must create at least one Client Group in order to add clients to their caseload.

## 5.5    Create a Client Group:



Right click the provider's name in the Tree Directory or navigate to the provider's Home Page via the console.

On the drop-down menu (Tree Directory) select **Create New Client Group** or click on the Manage Groups link on the provider's home screen. Click the **Create Client Group** link found on the Manage Groups page.

Fill out the form that appears in the MCA. If clients in this group will be receiving group therapy, click the box labeled "**Is this a GSRS Group?**" to ensure members in this group will receive the Group SRS.

Click the **Create Client Group** button. The Client Group should now appear on the tree view.

**Note: A triangle will appear in the Tree Directory next to the Client Group name when the provider begins to enter clients. Clicking on the triangle will expand the list of clients in that group.**

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## 5.6    To Add Clients:

Once a Client Group has been set up, you can add clients.

Right click on the Client Group and select **Create New Client** from the drop-down menu or click on the **Create Client** link on the provider's Home Page.

Complete the form that loads. Include the client's name and/or user ID (required field), the Client Group you want the client listed under, and their gender. If you are an agency, you can select as many Tags as apply.

**Tip: Tags are another mechanism for organizing information for analysis in the Aggregate Stats.**

Enter the client's date of birth (required field). **Note: This information is critical because their age determines which default survey type, clinical cut-off, and normative data will be used.**

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Using the appropriate radio button (Adult/Adolescents, Group, or Children), select the survey type to be used, if it differs from the default. If the client is to receive group treatment, select Group so that they will receive the **Group Session Rating Scale (GSRS).**

Choose the survey language and whether feedback messages should be displayed, if these differ from the default.

If **Demographics** has been activated in the owner level **Options**, you can enter demographic information. There will also be an area to enter additional notes about the client.

**Warning**: If Demographics is deactivated and then reactivated at a later time, any demographic information and notes that has been entered previously may be lost.
Click on the **Create Client** button.

After you get a message indicating that the client was successfully created, close the message box and the client's ID will appear in the Tree Directory.

At any time, you can leave the Create Client page by clicking the Up to Provider Home link in the upper right corner.

**Note: The Client Group and survey type need to match if the client is to receive the GSRS. In other words, you will only be allowed to select the Group survey type for a client who is in a Client Group that has been designated to receive the GSRS.**

**Tip: To ensure a client receiving individual counseling isn't mistakenly listed as receiving group therapy, or a child is listed as an adult, or vice versa, MyOutcomes® has a failsafe mechanism, which, during the creation of a client's file or updating a client's file, notifies and prevents the provider from continuing if the client is being assigned to the wrong Client Group type. If it is important to track progress in two or more different programs the client is participating in, then add a notation to the end of the client's ID, to create unique Client IDs.**

**Warning:** The use of underscores is not allowed when creating or modifying client names.

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## 5.7      Add a Couple:



Couples are also added to Client Groups.

Right click on a Client Group and select **Create New Couple** from the drop-down menu. Alternatively, click the **Create Couple** link found on the provider's Home Page.

When the Create Couple form loads, complete the text boxes on the form in the MCA for the couple and for each partner. The Couple ID, the ID for each couple member, and their birthdates are required fields.

Select the Client Group.

Choose the relevant Tags for the couple.

Choose the survey language for each couple member and whether feedback messages should be displayed, if these differ from the default.

Click on the Create Couple button.

After you get a message saying the user was successfully created, close this message box. The couple's name will appear on the Tree Directory and in the list on the Home Page.

Both partners are listed under one user name on the Tree Directory. To view each individual partner, click on the triangle beside the couple user ID or name to expand the tree or click on the couple user ID in the list on the provider's Home Page.

At any time, you can leave the Create Couple page by clicking the Return to Provider Home link in the upper right corner.

## 5.8        New Couple Functions

With the New Couple Functions, you can now separate the couple and do individual counselling. These functions also allow you to deactivate individual couple members. To deactivate individual couple members, right click a couple member and click Deactivate Couple Member. This will redirect you to the standard Deactivate Client Screen. In addition, there is a Deactivate Client link on an active Couple Member client console.

To reactivate a couple member who were previously deactivated, right-click on an inactive couple member and click Reactivate Couple Member. You will be presented with the reactivation screen. If reactivation reason selected is Continuation of Prior Episode, the couple member will simply be reactivated. If New Episode of Care is selected for a couple member, it will create a new stand-alone client, separate from the original couple member but with episode 2; the original couple member will be closed.

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## 5.9    Feedback Source:



**Create Feedback Source for: Joine**

⬅ Return to Joine Feedback Sources

Feedback Source ID: [                    ]

Tags [                                ]

Feedback Source Type: [ Select Type... ▲▼ ]

Survey Type:

"Children Survey Type" uses simpler language and is appropriate for children.

🔘 Adults/Adolescents (13+)
⚪ Group
⚪ Children (6 - 12)

Default ORS/SRS Survey Language: [ English ▲▼ ]

Display CSR?: [ No ◆ ] What's this?

[ **Create Feedback Source** ]

Adding a Feedback Sources (Collateral Rater, such as parents, probation officers, etc. can be added to a Client Group).

Feedback Sources are people associated with a client. A Feedback Source may be included in sessions and asked to complete the session surveys. This can provide opportunities to explore the differences and similarities between the client's and the Feedback Source's experiences. For example, the client may perceive their self as doing very well, whereas a family member may have a different experience. It is possible to add one or several Feedback Sources to a client's account or case.

## 5.10    Adding Feedback Sources:

Right click on the client name in the Tree Directory or navigate to the Client Console from the provider's Home Page.

Select **Add Feedback Source** from the client's drop-down menu in the tree. Alternatively, on the Client Console, click on **Feedback Sources** link. After the Feedback Sources page loads, click on the **Create Feedback Source** link located on the right side of the Client Console. Either method will take you to the **Create Feedback Source for: <client ID>** page.

Enter the Feedback Source's name, select type (i.e. spouse/partner, parent/caretaker, sibling, school, other), and applicable Tag(s), Select appropriate language and survey for the Feedback Source.

You have the option of displaying the CSR for the Feedback Source or not. Choosing not to display the CSR provides you the option of adding a Feedback Source, whose scores match the client's session dates even though the Feedback Source may not start at the first session. If you choose to display the

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CSR, a score for the initial session will be required. After this initial session, you will have the option of skipping any sessions the Feedback Source does not participate in.

**Note: Select display Client Status Report - CSR for the Feedback Source if you want to track their ORS scores in a similar manner as that of the client.**

Click on the **Create Feedback Source** button at the bottom of the page.

When the action is completed, a message indicating that the Feedback Source was successfully created will appear in a message box. Close the box.

To view the Feedback Source on the Tree Directory, click on the triangle symbol by the client's name to expand the Tree Directory.

At any time, you can leave the Create Feedback Source page by clicking the **Return to <client ID> Feedback Sources** link in the upper right corner.

## 5.11    Locating Clients:

There are two methods of finding clients. The first option is to locate the client in the tree view or in the console.

Navigate to provider name on the tree view or navigate to the provider's Home Page.

Click on the triangle symbol by the user name to expand the Client Groups, if using the tree.

Select the correct Client Group and click on the triangle symbol to expand the group.

Select the client from the group.

Click on the client's username in the tree or in the client list on the provider's Home Page to navigate to the Client Console.

The second option is to do a client search. To find a client using the Client search:

Right click on the user's name in the Tree Directory and select Find Client on the drop-down menu or click on the Find Client link on the user's Home Page.

In the Find Client screen, type the client's user ID or user name in the search field.

Click on the search icon.

Click on the client's username in the tree or in the client list on the provider's Home Page to navigate to the Client Console.

## 5.12    Deactivation of Clients and Couples:

Deactivating a client will also deactivate Feedback Sources attached to the client. Deactivating a Couple will deactivate both couple members.

## 5.13    To Deactivate Clients and Couples:

Right click on the client or couple user name or ID on the Tree Directory and select **Deactivate Client.**

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Alternatively, clients can be deactivated by clicking the **Deactivate Client** link at the top of the Client's Console.

Complete all fields on the deactivation screen.

**Note: Reasons for deactivation are decided and set at the owner level (see Chapter Three)**

Click the check mark to complete the deactivation.

The client or couple user name will no longer be displayed on the active Tree Directory.

To access inactive client information, click the Show Inactive/Closed box at the top of the Tree Directory. Inactive clients will appear in light grey, italicized font in the provider's client list in the Tree Directory. If you know the client's user ID, you can also search for the client.

To view closed data from the previous treatment episodes, check the Show Inactive/Closed box at the top of the Tree Directory or conduct search for the client. Clients with closed episodes of care will be listed on the Tree Directory in light, italicized font.

**Note: For experienced MyOutcomes® users, to simplify the deactivation process, the "Did Client Reach/Exceed Predicted Score?" option will no longer be needed to be answered while deactivating a client.**

## 5.14    Reactivation of Clients:

Clients can be reactivated from the Tree Directory or from the provider Home Page.

## 5.15    Reactivation from the Tree Directory:

Click on the Show Inactive/Closed box at the top of tree directory. Inactive clients will appear in light grey, italicized font.

Navigate to client name or user ID on the Tree Directory.

Right click on the client name or user ID.

Select **Reactivate Client** from the drop-down menu.

On the Reactivate Client screen, complete the required fields in the drop-down menu.

Select the appropriate Type from the drop-down menu:

If **New Service Episode** is selected, then the previous data is closed out and the client's previous care is considered closed. A new designation will be added to the client's ID to help distinguish between past and current episodes. The first ORS administered in the new episode of care will be used to set a baseline for the new episode. Thereafter, the new client progress chart will display this new baseline score with a new CSR and predicted Success trajectory.

If **Continuation of the Previous Episode** is selected, the previous episode will be reactivated and data will be entered as if there were no break in service (i.e. same CSR graph and predicted Success trajectories).

**Note: The New Service Episode results in the prior episode of care being closed. Closed Episodes (Cases) cannot be reactivated. When an episode of care has been closed, the Client Console will be designated Closed Client Console. In contrast, the Client Console for inactive clients will be labeled Inactive Client Console.**

## 5.16    Reactivation from the Client Console

Click on the client name in the Tree Directory to go to the Inactive Client Console.

Click on the **Reactivate Client** link that is located near the top of the Inactive Client Console.

On the Reactivate Client screen, complete the required fields in the drop-down menu.

Select the appropriate Type from the drop-down menu:

If **New Service Episode** is selected, then the previous data is closed out and the Client's previous care is considered closed. A new designation will be added to the Client's ID to help distinguish between past and current episodes. The first ORS administered in the new episode of care will be used to set a baseline for the new episode. Thereafter, the new Client progress chart will display this new baseline score with a new CSR and predicted Success trajectory.

If **Continuation of the Previous Episode** is selected, the previous episode will be reactivated and data will be entered as if there were no break in service (i.e. same CSR graph and predicted Success trajectories).

## 5.17    Transferring Clients:

The ability to transfer clients depends on the user's level of access. Providers can only transfer clients from one Client Group to another Client Group on their tree. Both active and inactive/closed clients can be transferred.

## 5.18    To Transfer Clients:

Right click on the client name in the Tree Directory or go to the Client Console and click the radio button in the Select column on the same row as the client's ID.

From the drop-down menu on the Tree Directory, select **Transfer Client** or from the provider's Home Page select **Transfer** in the **Select Action** drop-down menu.

In the Transfer User dialogue box, select which Client Group you wish to transfer the client to.

Confirm your selection to complete the transfer.

## 5.19    Transferring clients to a GSRS group

Create a Client Group and mark it as a GSRS group. Then, transfer a client whose survey type is set to Adult- to that new GSRS group. The client's survey type will be changed to Group automatically.

## 5.20    Transfer History

A client's transfer history can be reviewed by clicking on the Transfer History link found at the top of the Client Console.

## 5.21    Deleting Clients:

When a client is deleted, the client and all of their data are deleted from the system.

**Note:** Clients should not be deleted from MyOutcomes® unless they were entered in error.

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# CHAPTER 6

# MyOutcomes® Mobile

## 6.0 MyOutcomes® Mobile App Overview
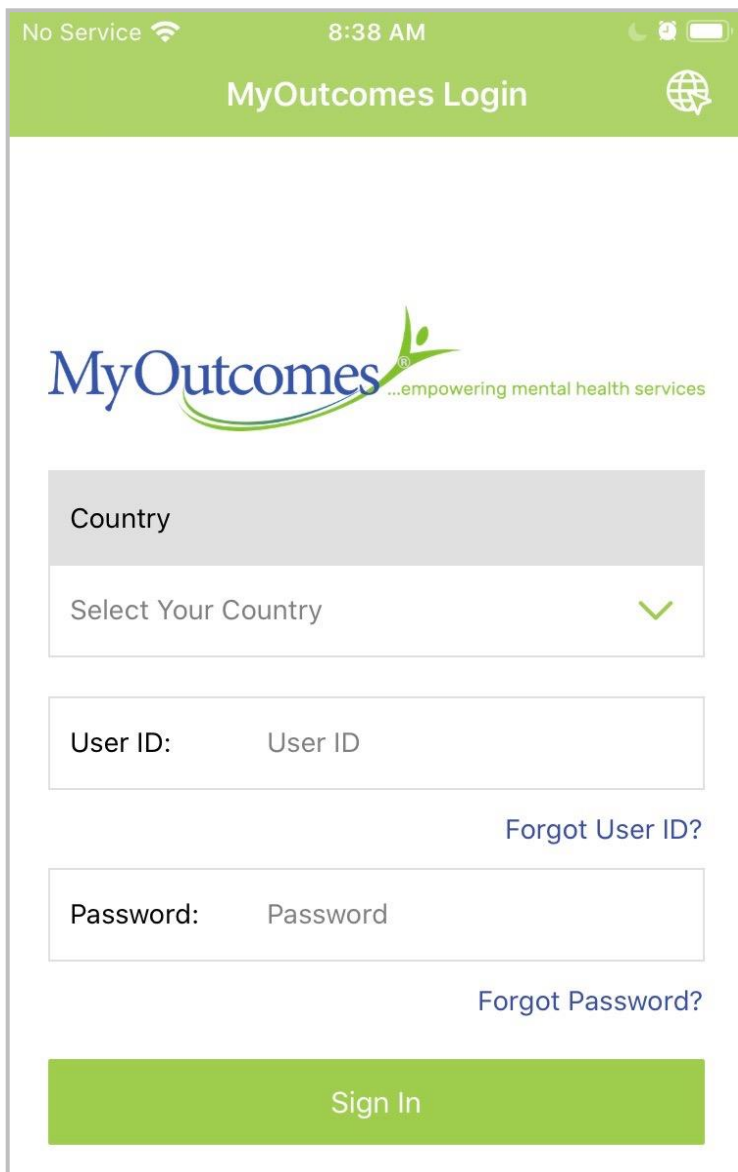
The MyOutcomes® Mobile App can be used in both face-to-face sessions as well as in remote/distant/telehealth therapy. Chapter 7 focuses on using MyOutcomes in a telehealth session.

In addition to allowing the provider to administer the ORS and SRS remotely, the MyOutcomes® Mobile App enables the provider to administer both surveys to clients offsite or when WiFi or a network is unavailable. Although the app does not have access to the full functionality as does the web app, one of the core advantages of using the mobile app is in replacing the administration of the paper versions of the ORS/SRS and then having to manually enter the scores into the web app. The surveys can be administered using the provider's iPhone, iPad, smartphone or other device. When WiFi or network connectivity is re-established, the mobile app will automatically communicate new ORS and SRS scores to the MyOutcomes® Web App, so that the client's CSR can be updated. If WiFi or a network connection is available during the administration of the ORS and/ or SRS, the CSR is immediately updated, allowing the provider to integrate it into the current offsite therapeutic session.

Note: The MyOutcomes®Mobile App is a provider tool. As such, users need to have a provider account, in contrast to an owner, administrator, or supervisor account, to log into the app.

## 6.1 User Limitation

To avoid sluggish responsivity in the app, there is a set limit of five (5) providers per app per device. If you need more than five providers to use the same device, you can have your staff use the trash icon at the top of the page after they have finished using the app. This will remove their account/data from the app environment, thereby allowing multiple providers to share the same device. When they log into the app the next time, the provider's client list will be uploaded without any consequence. If the provider was using the app offline, they must open the app after reconnecting to a network AND prior to deleting

their account from the MyOutcomes® Mobile app. The two systems need to connect so that the offline data can be synced with the web app.

## 6.2        User Language

On the Mobile app login page, the user has the option of selecting the language used on the login page and other general areas of the program. At the top of the MyOutcomes login page there is a globe icon. Clicking this icon opens a drop-down menu with 8 languages to select from.

This language selection is independent of the survey language. Survey language is selected when creating a client account or on the client's detail page in the Web app.

## 6.3        Forgot Password and User ID

Forgot Password and User ID are available on the MyOutcomes® Mobile App login page. Click on the Forgot User ID or Forgot Password link to use.

## 6.4        Organization of & Navigating Through MyOutcomes® Mobile 6.9

MyOutcomes® Mobile 6.9 includes a provider dashboard and offline administration. In addition, there is client level access that allows your clients to enter their own ORS/CORS, SRS/CSRS/GSRS directly into MyOutcomes® using their smartphone or tablet. The app can be downloaded for free from iTunes or Google Play. If this is the provider's first login, the MyOutcomes® Web App will download the provider's current client list to the mobile app. After this initial setup, every time the provider logs in, they will land on the Client List. The Client List reflects the most current active client information in the provider's Web App account. The organization of the Client List in mobile app reflects the list in the Web App (alphabetically). The provider will see the client type, Client ID/Client Group, Session #, the current survey type and a color-coded CSR icon. At the bottom page, there is an icon for logging out of the app. On each page in the app, the provider can return to their Client List by clicking the Home icon or Provider Home. These are found in either the upper or the lower task bar.

## 6.5        Creating Client Accounts

When a provider logs into the Mobile app, it will sync with the information in Web app. All of their active clients, their client group and survey data will appear in the Client List. The provider can create client accounts within the MyOutcomes® Mobile App by clicking the plus sign in a circle at the top of the screen on the Home page. If the provider has not already set up their account and this is their first login, they will need to create a Client Group.

Creating a client in the Mobile app will follow the same basic procedure as in the Web app (see Chapter 5).

## 6.6        Select Languages

MyOutcomes® Mobile supports multiple languages for the ORS/SRS surveys. If creating a client account, select which language will work best for your client.

## 6.7        Skip Function

The Skip Function has been added to the Home Page. After logging into the MyOutcomes® Mobile app, click the Skip icon for the client (or Feedback Source) in the list. The Skip Session page will open. As with the Web app, if you are at the beginning of a session, you can choose to Skip ORS, Skip Both ORS

and SRS, or Delete Last Session. If the ORS has already been completed, the Skip Session page will only allow you to skip the SRS.

## 6.8     Retaking the ORS/SRS

After completing the ORS or SRS, your client has two mechanisms for retaking the survey if they wish to adjust their scores.

1) After moving their sliders, they will be taken to a page that provides a visual summary of the four scales. From this page, they can use the back arrow at the top of the screen to readjust the sliders.
2) After committing their scores, they will arrive at a page that plots their scores graphically. At the top of the screen, there is an option for retaking the survey.

Note: When you are in the survey environment, you can administer the next survey without needing to return to the Client List. This ensures that the Password lock enabled function will not disrupt the flow of the session with your client.

## 6.9     Accessing the CSR

Touching the CSR icon will open the most up-to-date CSR for the client. When WiFi, or a network, is available, the CSR is automatically updated on the mobile app. If WiFi, or a network, is not available, the CSR will reflect the last update when the mobile and web app were able to exchange information. Touching the survey icon will open the most current survey that the client is to complete. The process for completing the survey is identical to that used for remotely administering the ORS/SRS. After the client submits the survey scores, an updated CSR will be generated if WiFi or a network connection are available.

## 6.10     Accessing Couple Members & Feedback Sources

To access individual couple members, click on the underlined couple ID in the client list. Clicking on the couple ID will open a page listing the individual couple member IDs. You can access each couple member's survey by clicking on their ID. Their latest CSR will also be available.

Clients that have Feedback Sources will have their user IDs underlined in the client list. To open the list of Feedback Sources, click on the client's user ID. On the page that opens, the Feedback Sources latest CSR and survey administration will be available.

## 6.11     Client Lockout

When administering the ORS/SRS, you will want to lock out your client from accessing your Client List. When you set up the device for your client to complete the ORS/SRS, you will see the message Password lock enabled. To exit the survey area and return to your Client List, you will need to use your password. If using an iPhone or iPad, you can use the touch ID or face identification features, if set up.

## 6.12     Client Search

You can search for clients by using the funnel shaped icon at the top of Homepage. You can search via Client Group or client ID.

## 6.13     Font Size

You can adjust the font size using the A+ icon at the top of the Home page screen.

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## 6.14        The MO Web Icon – Accessing Additional Functionality

The Mobile app has limited built-in functionality. That being said, all provider functionality, e.g. Give Access, creating additional client groups, reporting features, couple, feedback source and group comparison graphs, is accessible from within the Mobile app. At the bottom of the Client list page, the MO Web with a cloud icon can be seen. Clicking on this icon opens the provider's Web app, where they have access to all of the MyOutcomes functionality.

To return to the Mobile app, close the Web app window.

# CHAPTER 7
# MyOutcomes® Telehealth Integration

## 7.0  Overview of Using MyOutcomes® in Telehealth

For those people with mental health needs, who live in those areas where mental health support isn't readily accessible, e.g., rural areas, inner-cities, population dense areas, telehealth (a.k.a. Remote Access or Distance Therapy) has been viewed for quite some time as the solution for getting service to those needing support in those areas. With the arrival of Covid-19 in 2020 and the changes in social dynamics that it has imposed, practices servicing more conventional clientele have found themselves moving to the telehealth model.

Since 2014, MyOutcomes functionality has supported telehealth models of therapy (https://www.effectivetherapistblog.com/ors-srs-telehealth-support/). Each practice has its own unique approach with clients. This movement to telehealth has made us at MyOutcomes more keenly aware of this. As such, taking the feedback that our customers have provided us, we are introducing innovations that we feel makes MyOutcomes more user-friendly to not just our customers, but to their clients. And, recognizing that 'one size' does not fit all, we leave the decision to utilize or not utilize the new features with the account owners.

## 7.1  Owner Level Controls

There are two functions that are controlled at the owner level under Options.

    **A.**    **Option 17 – Don't retain client email addresses**

        1.    The default setting is for the system to retain the client email addresses that are entered by the provider and/or other staff. Retention of client email addresses eases the use of the Give Access functionality by not requiring the email address being entered each time the Give Access is used. **Furthermore, in order to use the schedular to send future reminders, the email address will need to be retained in the system.**

        2.    In recognition that some providers and agencies may be operating under security/privacy protocols that don't permit a client's email address being retained in our system, this function can be turned off. **To turn off the function for retaining clients' email addresses, uncheck #17 under Options.**

            a.  Although the client's email address will not be retained in the system, the client's email can be used to send an 'one off' email.

**B.** **Option 24 – Enable Client Single Sign On**

1. **By default, this option is turned on. Unchecking the box for this item will turn it off across the account.**

2. Single Sign On (SSO) enables a link that bypasses the more traditional login procedures, enabling the client to access their surveys with a single click of the link. Although clients will still have system-generated login credentials, they will now have the option to choose logging in or using the link.

3. Although the provider can have the link sent to the client in a system email, the provider can also copy and paste the link for immediate sharing in telehealth therapy sessions.

## 7.2 Accessing the Give Access Functionality

To improve efficiency, the Give Access function has now been integrated with the Client Update page. **After creating** a client account, *the Give Access Options* will appear on the client's detail page. Unchecking the box next to the "Do you want to give access to the Client?" question will turn off the Give Access functionality for this client. Checking the box will turn the functionality back on.



## 7.2.1 Give Access for a Client, Couple or Feedback Source

As with clients, when creating a couple or feedback source account, follow the steps as described in Chapter 5. If the owner level is set to retain the client's email address, you can enter the client's email address at this time.

Once the client account has been created, navigate to the client's ID in the client list. Note for couples, there is no Give Access Icon next to the ID on the Provider Console. First, you must navigate to the Couple Console, where the couple members are listed. Click the Give Access link next to the ID. The

client detail page will open with an orientation to the Give Access functionality, which will have been automatically turned on.

## 7.3        Give Access Functions

The Give Access functions can be roughly grouped into three areas: 1) Setting up client access; 2) Sending access to the client; 3) Scheduling access.

### 7.3.1        Setting Up Client Access

A.   Client Email Address

In order to send an email containing login details to a client, an email address is required. There is a section at the top of the client details page where an email address can be entered. The email address needs to be **unique** to that client. Email addresses used elsewhere in the account cannot be used for a client.

**Note**: In situations where others, e.g. Feedback Sources, are currently using the same email address as the client, you can delete the email address from one account and then click Update. The email address can then be used for someone else.

B.   If at the owner level of access Option 17 is left unchecked, the system will retain the email address that is entered for the client. If Option 17 is checked, the system will not retain client email addresses.

In the latter case, email addresses can still be used to send login credentials or a Direct Access Link to the client. You can reuse the same email each time you want to generate a Direct Access link for a client. However, the email address will need to be re-entered in future communications.

C.   Whether client email addresses are retained or not will determine the user ID that is provided to the client.

1.   If the account is set so that client emails will **NOT** be retained, the client's user ID will use a computer-generated C# format.

2.   If the account is set so that client emails **ARE** retained, the client's email address will serve as their ID.

3.   The provider will find their client's email address and current password on the page that opens after clicking the Send Access button.

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**Note**: The email as User ID is an option for client login only. The Account ID that is given by the provider or agency is not the same and is independent of the Give Access functionality.

D.  Custom Messages

There are three places that the provider can customize a message for their clients.

1.  When clicking the Send Access button, the provider will have the option of adding a Send Access specific message to accompany the email that is sent to the client.

     a.  On the page that opens up, the provider will have access to the client's user ID and current password.

2.  An opportunity to update a default custom email message will also be available when using Single or Recurring Reminder.

3.  The provider can change their customized messages any time.

**Note**: Customized messages will be automatically saved as default for all of the provider's clients. In other words, the messages are not client specific.

## 7.3.2    Sending Access to The Client & Scheduling Reminders

There are four ways to send a client access. Two are immediate, while the other two are scheduled.

A.  **Send Access**: By clicking the Send Access button, an email will be sent immediately to the client. It is **important to remember** that every time this button is used both the password and the single sign-on link will be reset by the system.

1.  After clicking the Send Access, a page will open that displays the current message that will accompany the client email. The client's user ID and current password will also be listed on this page.

B.  **Direct Access Link:** If Client Single Sign On is enabled at the owner level, you will see a Direct Access Link button. Clicking that button will generate a unique code in the white field area. This link will enable the client to access their survey on their browser with one click. This link can be copied and pasted by the provider into:

1.  A personal email.

2.  A text message.

3.  The online platform being used by the provider and client.

C.  **Single Reminder**: Clicking the Single Reminder button provides the opportunity to schedule an email to be sent once at some preselected time and date.

D.   **Recurring Reminder**: Clicking the Recurring Reminder button will open a page that will enable the provider to schedule reminder emails to be sent to the client in a manner that reflects the providers' scheduled sessions with their clients. The provider can schedule:

1.   The date that the initial email is to be sent.

2.   The time that email should be sent. Aside from time, select the appropriate time zone.

3.   The frequency of emails i.e., daily, weekly or monthly.

4.   The end date.

5.   The number of occurrences. When the provider selects this, the system will automatically calculate the end date based upon the frequency that was selected.

E.   **Cancelling Scheduled Reminders**

When reminders, single or recurring are scheduled, a notification of when the next reminder is scheduled to be sent will appear in green font on the client's detail page, immediately below the links for scheduling the reminders.

Just below the Recurring Reminder button, a **Cancel** button will appear. Clicking the Cancel button will cancel your scheduled reminders.

## 7.4     Client Emails

When using any of the Give Access functionality, the system will send an email to the client with information on how to access the surveys. An example of the initial Welcome email is provided and described here.

**Note:** If scheduling reminders, the emails will be nearly identical in format. The only two things that the reminders will not contain are the client's user ID and the client's password. If SSO has been turned on at the owner level, the reminder emails will contain the **Direct Access** link.

### 7.4.1     Client Email Structure

A.   After the greeting, a message will be provided. If a custom message has been created, it will appear here. If the provider has not created a custom message, the system will use a generic message.
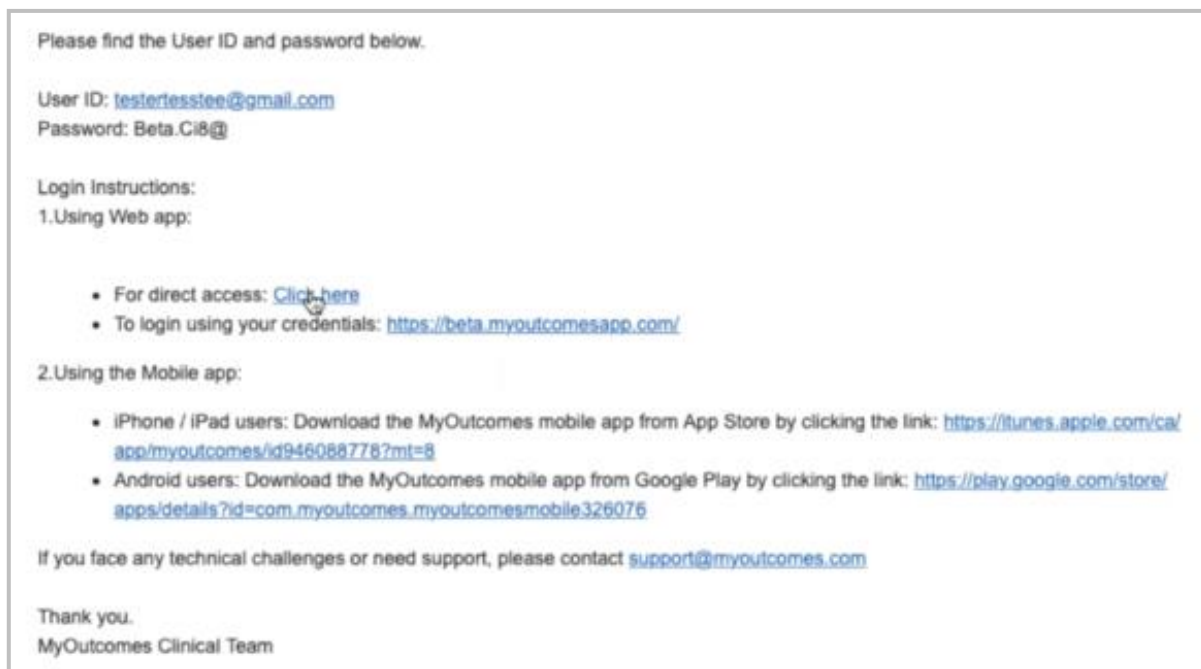
B.      The email will identify the provider as the individual giving access to the client's surveys.

C.      In the Welcome email, the client will be provided with a user ID and password. In Reminder emails, this information will not be resent.

    1.      Unless Option 17 (Don't retain client email addresses) is checked at the owner level, the system will use the client's email address as their user ID.

    2.      If Option 17 is checked, the system will generate a client user ID beginning with C# and followed by a series of digits.

    3.      The login credentials can be used to log into the Web app or the Mobile app. In either event, the client's experience of completing the surveys will be nearly identical.

D.      The next section contains information for the client to log in and complete the surveys.

    1.      If they want to use the Web app, a URL is provided so that the client can access the surveys via their browser.

    2.      If Option 24 (Enable Client Single Sign On) has been checked at the owner level, the Direct Access link will appear in the email. If the client clicks the for direct access: **Click Here** hyperlink, they will be taken to their survey in the Web app. This link will appear in both the Welcome email and the Reminder email.

E.      Clients are welcome to download the Mobile app (see chapter 6) onto their device (smart phone or tablet) and using their login credentials provided in the email to complete the survey. Having clients in group therapy use their devices to complete their surveys is a great strategy for having all of the surveys completed in a timely fashion.

## 7.5    Couples

The procedures for using the Give Access in couple therapy is the same, with the exception that the process entails the two couple members and Give Access is not available on the provider console.

## 7.6    Feedback Sources

To access this functionality for Feedback Sources, click the **Feedback Sources** link in the upper-left corner of the client's console. The page that opens will list the client's current Feedback Sources. Click the Give Access icon next to ID to gain access to the functionality for the Feedback Source.

## 7.7    Changing the Client's Password

In previous Give Access versions, clicking the Give Access link would generate a new client password. This enabled providers to limit access to the survey by their clients. Currently, after completing their survey(s), clients are unable to access the surveys via logins or the SSO for 24 hours.

If the provider wishes to generate a new password for their client, they can click the Send Access button in the client's details.

## 7.8    Turning Off Access

There are two mechanisms to turn off the client's access.

1) When you deactivate a client, the access functionality will be turned off for the client. This will include any Feedback Sources. Any schedules will be deactivated as well.

2) If provider wishes to turn off the Give Access functionality for a client (or Feedback Source), but the client will remain in service, navigate to the client's details. On that page, uncheck *Do you want to give access to the Client?* This will turn off any schedules as well.

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# CHAPTER 8
## Outcome Rating Scale

### 8.0    Administering the Outcome Rating Scale (ORS, CORS) to Clients:

### 8.1    Entering Client ORS Scores:

There are two options for entering ORS scores. The client can take the electronic version of the ORS and have their scores entered directly. Alternatively, the provider can administer the paper ORS and then enter the scores manually.

**Tip: The MyOutcomes® free app, MyOutcomes® Mobile, is a good substitute for the paper version of the ORS, that eliminates the possibility of the provider accidentally misentering client scores (see Chapter 6).**

An ORS score must be entered for the initial session to provide a baseline. Although it is not recommended for clients to skip taking the ORS, it is possible to skip the administration of the ORS for subsequent sessions via the tree drop-down menu, the blue arrow button found on the same row as the client on the provider's Home Page, or by using the blue button with the arrow found towards the upper-right of the Client Console.

The CORS (Children's Outcome Rating Scale) and ORS are operationally identical with the exception that the CORS has language and visuals customized to be more accessible and appealing to children.

### 8.2    Client Enters ORS Scores:

The ORS can be accessed from the provider's Home Page by clicking on the blue button labeled ORS found on the same row as the client's ID. This will take you directly to the electronic version of the ORS.

Alternatively, clicking on the client's ID in the Tree Directory or on the provider's Home Page will gain access to the client's console. Select the first ORS icon button towards the top of the Client Console.

**Tip: It is recommended that you hide the tree Directory to prevent the client from seeing any caseload information. You can hide the Tree Directory by clicking on the red 'x' found at the top. To reveal the directory, click the green '+'. For extra security, it is also recommended using the Lockout Admin Controls, found at the top of the ORS page. You will need to use your password to unlock the Lockout Admin Controls to regain access to caseload data.**

The electronic version of ORS will load. Instructions and layout replicate paper and pencil versions to ensure validity.

The client completes the ORS electronically by clicking on the lines for each of the four domains or the client can click and drag the slider to the desired location on the line for each domain.

When the entry process is completed, an ORS Feedback page displays a graph showing the client's ORS scores plotted as a function of all sessions. A table with individual measure scores and total ORS score for the current session are displayed. If selected while creating the client file, a Feedback Signal (solid, colored circle) will be displayed:

**Green** indicates that the client's latest score is in the direction of improvement.

**Yellow** indicates caution i.e. the latest ORS score(s) doesn't reflect improvement.

**Red** indicates a warning that the client may be at risk for deterioration or dropping out.

If you wish to return to the Client Console, click on the **Return to Client Console** link located in the upper right corner of the page.

## 8.3      Entering Paper ORS Scores:

From the Client Console, select the second ORS button (the icon with ORS surrounded by a square.

On the page that loads, use the radio buttons to select whether to enter the scores for each ORS domain or a total ORS score.



Enter the ORS score(s) in the text box(es).

Enter a date by either typing in the date or moving the mouse over the date box and selecting the date from the pop-up calendar.

When entering paper ORS scores, make sure to enter the data in chronological order, because the scores will be tracked on the CSR in the order they are entered, not by the date entered. Click on the check mark at the bottom of the page to complete the entry.

**Warning:** If the date of the initial ORS score is entered incorrectly, the client profile will need to be recreated (after deleting the old profile) and score entry will need to restart with the correct date.

When you have completed entering the scores, an ORS Feedback page displays a graph showing the client's ORS scores and how they compare to a normative sample, as well as a Feedback Signal, if selected while creating the client account. (These Feedback Signals are described in the section detailing administering the ORS electronically.) If entered individually, a chart of the scores for each domain of the ORS is also displayed.

To return to the Client Console click on the Return to Client Console link located in the upper right corner of the page.

## 8.4 Entering ORS Scores of Feedback Sources:

Entering the Feedback Source scores for ORS and SRS surveys is accomplished in the **Feedback Source Console.**

To navigate to the Feedback Source Console, locate the Feedback Source in the client's expanded Tree Directory and then click on the Feedback Source name. Alternatively, from the Client Console, click on the Feedback Sources link.

As with the clients, security can be enhanced by hiding the Tree Directory and using the Lockout Admin Controls.



## 8.5 Entering Couple Survey Scores:

If working from the Tree Directory, clicking on the partner name will take you to the **Couple Console** as well as listing the couple's individual IDs in the tree. Clicking on the individual ID will take you to the **Couple Member Console** of that individual.

If working from the provider Home Page, clicking on the Couple ID will take you to the Couple Console. Clicking on an individual couple ID will take you to that Couple Member Console for that individual.

Clicking on the ORS icon, on either the Couple Console or the Couple Member Console, will open the ORS administration page for the Couple member.

It is recommended that security be enhanced by hiding the Tree Directory and using the Lockout Admin Controls.

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If administering the ORS on paper, click on the Couple member ID to go to the Couple Member Console. From the Couple Member Console, there is the option to either administer the ORS on the computer or to enter the paper ORS scores. Click on the paper ORS in a square icon.

After administering the ORS to one partner, click on the **Return to Couple Home** link in the up-per-right corner to close the ORS feedback chart to return to the Couple Console. Alternatively, you can click on the name of the other partner in the Tree Directory.

## 8.6        Skipping, Retaking or Deleting Surveys:

Although it is not possible to skip the initial ORS session, it is possible to skip the ORS on subsequent sessions. MyOutcomes® recommends against doing so as this defeats the purpose of soliciting feedback for effective therapy. It is also possible to delete a session after entering the ORS scores.



## 8.7        To Skip or Delete Survey Scores:

Right click on the client name on the Tree Directory and select Skip or Delete Session/Survey from the drop-down menu.

Alternatively, navigate to the provider's Home Page or the Client's Console. On the Home Page, click on the icon with the circular arrow found towards the end of the client list rows. On the console, click on the icon with the circular arrow towards the top right.

When the Skip /Delete Session page loads, use the radio buttons to select the desired action (i.e. skip survey, skip session, or delete the last session). If you choose Skip Entire Session, you can also note and track the reason the session was skipped, i.e. Cancelled or Did Not Attend, from the drop-down menu.

Click the check mark to complete the action.

When the action is complete, a message box will appear indicating the action was successful. Close the message box to return to the Client Console.

The date for the session will appear on the graph but the score(s) for the session will be absent from the chart indicating no score was entered for that survey or session.

The **Delete Last Session** option will not appear until there are two or more sessions. This is because an intake ORS/SRS session is required to form the baseline (see Aggregate Statistics. To delete a session, navigate to the **Skip/Delete Session: <user>** page. Click the Delete Last Session radio button and then click the check mark to save.

Selecting the Cancel and Return radio button or clicking on the Return to Client Console link will return you to the Client Console without skipping or deleting.

It is also possible for the client to retake either survey. The link **Retake Survey** link is found in the top right corner of the ORS or SRS Feedback page. Clicking this link will remove the record of the just completed survey and return the client to the survey.

## 8.8     Custom ORS

Choose to hide clients feedback results page and create a custom message on the results page. Login as Owner then click Options. Enable Custom ORS Feedback, a text field box will appear, you can enter the message you would like to appear as the results page. Click save at the bottom of the page.

# CHAPTER 9
## Session Rating Scale

**9.0      Administering the Session (Alliance) Rating Scale (SRS, CSRS, Group Session Rating Scale GSRS) To Clients:**

**9.1      Entering Client SRS Scores:**

As with the ORS, there are two options for entering SRS scores. The client can enter SRS scores directly using the electronic version of the SRS or the provider can administer the paper SRS and then manually enter the scores for the client. If Group was selected for the survey type when the client was added, the client will be administered the GSRS. (The Group Session Rating Scale is the same as the standard SRS except that the wording has been altered to reflect group therapy rather than one-on-one therapy.)

**Tip: The MyOutcomes® free App, MyOutcomes® Mobile, is a good substitute for the paper version of the ORS that eliminates the possibility of the provider accidentally mis-entering client scores (see Chapter 6).**

The CSRS and SRS are operationally identical with the exception that the CSRS has language and visuals customized to be more accessible and appealing to children.



**Warning:** The ORS is always completed prior to SRS administration. Until the ORS is administered, or skipped, the SRS options will be greyed out and disabled.

**Tip: The provider can switch between the SRS (Session Rating Scale) and the GSRS (Group Session Rating Scale) for those clients who are receiving both group and individual counseling.**

## 9.2     Client Enters SRS Scores:

The SRS can be accessed from the provider's Home Page by clicking on the blue button labeled SRS found on the same row as the client ID. This will take you directly to the electronic version of the SRS.

Alternatively, clicking on the client ID in the Tree Directory or on the provider's Home Page will gain access to the client's console. Selecting the first SRS button towards the top of the Client Con-sole can then access the electronic SRS.

Also available is a SRS Quick link that can be found in the top right corner of the ORS Feedback page.

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## Outcome Rating Scale



**Tip: It is recommended that you hide the Tree Directory to prevent the client from seeing any caseload information. You can hide the Tree Directory by clicking on the red 'x' found at the top. To reveal the directory, click the green '+.' For extra security, it is also recommended using the Lockout Admin Controls, found at the top of the SRS page. You will need to use your password to unlock the Lockout Admin Controls to regain access to caseload data.**

The electronic version of the SRS will load. Instructions and layout replicate paper and pencil versions to ensure validity

The client completes the SRS electronically by clicking on the lines for each of the four domains or by clicking and dragging the slider to the desired location on the line for each domain.

When finished, the client clicks the check mark to finish the entry.

When the entry process is completed, an SRS Feedback page displays a graph showing the client's SRS scores plotted as a function of all sessions and how they compare to the clinical cut-off. A table with individual measure scores and total SRS score for the current session are displayed. If selected while creating the client file, a Feedback Signal (solid, colored circle) will be displayed:

**Green** indicates a strong working relationship between the client and the provider.

**Yellow** indicates the client-provider relationship may be headed into the wrong direction.

**Red** indicates a warning that the client-provider relationship has deteriorated sufficiently that it may negatively impact therapy.

To return to the Client Console, click on the **Return to Client Console** link located in the upper-right corner of the page.

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## 9.3       Entering Paper SRS Scores:

From the Client Console, select the second SRS button (the icon with SRS surrounded by a square.

On the page that loads, use the radio buttons to enter individual scores for each SRS domain or a total SRS score.

Type the SRS score(s) in the text box(es).

Enter a date by either typing in the date or moving the mouse over the date box and selecting the date from the pop-up calendar.

**Note: When entering paper SRS scores, make sure to enter the data in chronological order because the scores will be tracked in the order they are entered, not by the date entered.**

Click on the check mark at the bottom of the page to complete entering the scores.

When you have completed entering the scores, an SRS Feedback page displays a graph showing the client's SRS scores and how they compare to the SRS cut-off, as well as a Feedback Signal, if selected while creating the client account. (These Feedback Signals are described in the section detailing administering the SRS electronically.) If entered individually, a chart of the scores for each domain of the SRS is also displayed.

## 9.4      Hide SRS

Choose to only administer the ORS. Login as Owner then click Options. Enable Hide SRS.

## 9.5      Entering SRS Scores of Feedback Sources:

Entering the Feedback Source scores for SRS surveys is accomplished in the **Feedback Source**

**Console.**
To navigate to the Feedback Source Console, locate the Feedback Source in the client's expanded Tree Directory and then click on the Feedback Source name. Alternatively, from the Client Console, click on the Feedback Sources link.



As with the clients, security can be enhanced by hiding the Tree Directory and using the Lockout Admin Controls.

## 9.6    Entering Couple Survey Scores:

If working from the Tree Directory, clicking on the partner name will take you to the **Client Console**, as well as list the individual couple IDs in the tree. Clicking on the individual ID will take you to the **Couple Member Console** of that individual.



If working from the provider Home Page, clicking on the Couple ID will take you to the Couple Console. Clicking on an individual couple ID will take you to that Couple Member Console for that individual.

Clicking on the SRS icon, on either the Couple Console or the Couple Member Console, will open the SRS administration page for the Couple member.

It is recommended that security be enhanced by hiding the Tree Directory and using the Lockout Admin Controls.

If administering the SRS on paper, click on the couple member ID to go to the Couple Member Console. From the Couple Member Console, there is the option to either administer the SRS on the computer or to enter the paper SRS scores. Click on the paper SRS in a square icon.

After administering the SRS to one partner, click on the Return to Couple Home link in the upper-right corner to close the SRS feedback chart to return to the Couple Console. Alternatively, you can click on the name of the other partner in the Tree Directory.

## 9.7    Skipping, Retaking or Deleting Surveys:

Although it is not possible to skip the initial ORS session, it is possible to skip the SRS. MyOutcomes® recommends against doing so as this defeats the purpose of soliciting feedback for effective therapy. It is also possible to delete a session after entering the SRS scores.

## 9.8    To Skip or Delete Survey Scores:

Right click on the client name on the Tree Directory and select Skip or Delete Session/Survey from the drop-down menu.

Alternatively, navigate to the provider's Home Page or the client's console. On the Home Page, click on the icon with the circular arrow found towards the end of the client list rows. On the con-sole, click on the icon with the circular arrow towards the top right.

When the Skip/Delete Session page loads, use the radio buttons to select the desired action (i.e. skip survey, skip session, or delete the last session). If you chose Skip Entire Session, you can also note and track the reason the session was skipped, i.e. Cancelled or Did Not Attend, from the drop-down menu.

Click the check mark to complete the action.

When the action is complete, a message box will appear indicating the action was successful. Close the message box to return to the Client Console.

The date for the session will appear on the graph but the score(s) for the session will be absent from the chart indicating no score was entered for that survey or session.

Selecting the Cancel and Return radio button or clicking on the Return to Client Console link will return you to the Client Console without skipping or deleting.

It is also possible for the client to retake either survey. The link **Retake Survey** link is found in the top right corner of the SRS or SRS Feedback page. Clicking this link will remove the record of the just completed survey and return the client to the survey.

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# CHAPTER 10
## Editing & Comparing ORS/SRS Data

It is possible to edit data if it is entered incorrectly or if the client decides to change their scores after they have been entered. It is also possible to review and compare individual and total ORS and SRS scores from different session. Access to functions for editing and comparing session scores is found on the Client Console.

### 10.0    To Edit Data Including Survey Scores and Session Dates:

Click on the client name in the Tree Directory or on the provider's Home Page to navigate to the Client Console.



| Session | Action | ORS Date | Individually | Inter-personally | Socially | Overall | Total ORS | SRS Date | Relationship | Goals & Topics | Approach/ Method | Overall | Total SRS | Notes |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Select... | 2/7/2014 | 4.1 | 4.2 | 4.1 | 4 | 16.4 | 4/29/2014 | 9 | 8.9 | 8.2 | 8.7 | 34.8 | View Note |
| 2 | Select... | 5/7/2014 | 4.3 | 4.6 | 4.5 | 4.5 | 17.9 | 5/7/2014 | 8.9 | 7.9 | 9.1 | 9.1 | 35 | View Note |
| 3 | Select... | 5/13/2014 | 5.3 | 5.2 | 5.1 | 5.1 | 20.7 | | 0 | 0 | 0 | 0 | 0 | View Note |

Click on the **Update Past Sessions** link located at the top of the CSR.

When the **Update Session for <client>** page opens, you will see a table listing all the sessions and the ORS/SRS scores for each session. On the far left of each session row, there is a dropdown menu with three options.

**Note: The Update Session for <client> page provides an alternative method for skipping the SRS.**

If editing or deleting, select to edit either the individual scores or the total score. Either option allows you to edit the date.

**Warning:** If the date of the initial ORS was entered incorrectly, it will be necessary to create a new client profile (after deleting the old one and scores will need to be re-entered (manually).
Make changes to or delete scores for the ORS or SRS or both.

To the far right of each row, a **View Note** link allows you to provide a brief note regarding the edits.

**Tip:** The **View Note** function can be used to record anything significant about a session's SRS or ORS score.

To make the edits/deletions permanent, click the green Save button that appears on the left side of the row when you start editing.

**Note: Account owners have the option to limit the range of time in which ORS/SRS scores can be changed. After that time period has passed, the ORS/SRS scores will be locked.**

To return to the client's console, click the **Done** box in the lower right corner. Your changes should be reflected in the CSR.

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## 10.1    Session Type

On the **Update Past Sessions** page, the user has the option of recording how the session was conducted, e.g. face-to-face, video conference, etc.

To record Session Type, left click the link found beneath the **View Note** link. A drop-down menu will appear. Select the appropriate session type and click **Save**.

## 10.2    To view and compare client ORS/SRS data side-by-side:

Click on the **Compare Past Session Data** link found below the CSR. Use the drop-down menu to select which session to view. Clicking on **Add** session for side by side comparison or the **Compare Past Session Data** links will allow up to four sessions to compare simultaneously.

| Compare Past Session Data | | | | |
|---|---|---|---|---|
| Add session for side by side comparison | Session: 1 | Session: 2 | Session: 3 | Session: 3 |
| ORS Date | 2/7/2014 | 5/7/2014 | 5/13/2014 | 5/13/2014 |
| Individually | 4.1 | 4.3 | 5.3 | 5.3 |
| Interpersonally | 4.2 | 4.6 | 5.2 | 5.2 |
| Socially | 4.1 | 4.5 | 5.1 | 5.1 |
| Overall | 4 | 4.5 | 5.1 | 5.1 |
| **Total ORS** | **16.4** | **17.9** | **20.7** | **20.7** |
| | | | | |
| SRS Date | 4/29/2014 | 5/7/2014 | | |
| Relationship | 9 | 8.9 | 0 | 0 |
| Goals and Topics | 8.9 | 7.9 | 0 | 0 |
| Approach/Method | 8.2 | 9.1 | 0 | 0 |
| Overall | 8.7 | 9.1 | 0 | 0 |
| **Total SRS** | **34.8** | **35** | **0** | **0** |

## 10.3    Comparing Client and Feedback Source ORS/SRS Scores:

To compare the scores of clients and their Feedback Sources, go to the Client Console and click on the Feedback Sources link located at the top of the Console. On the Feedback Sources page, click on the **Client/Feedback Source Comparison Graph** link. Two graphs, a **Client/Feedback Source ORS Comparison** and a **Client/Feedback SRS Comparison**, will be generated. These graph display, respectively, the ORS progress and SRS scores by session for the client and all feedback sources associated with the client.
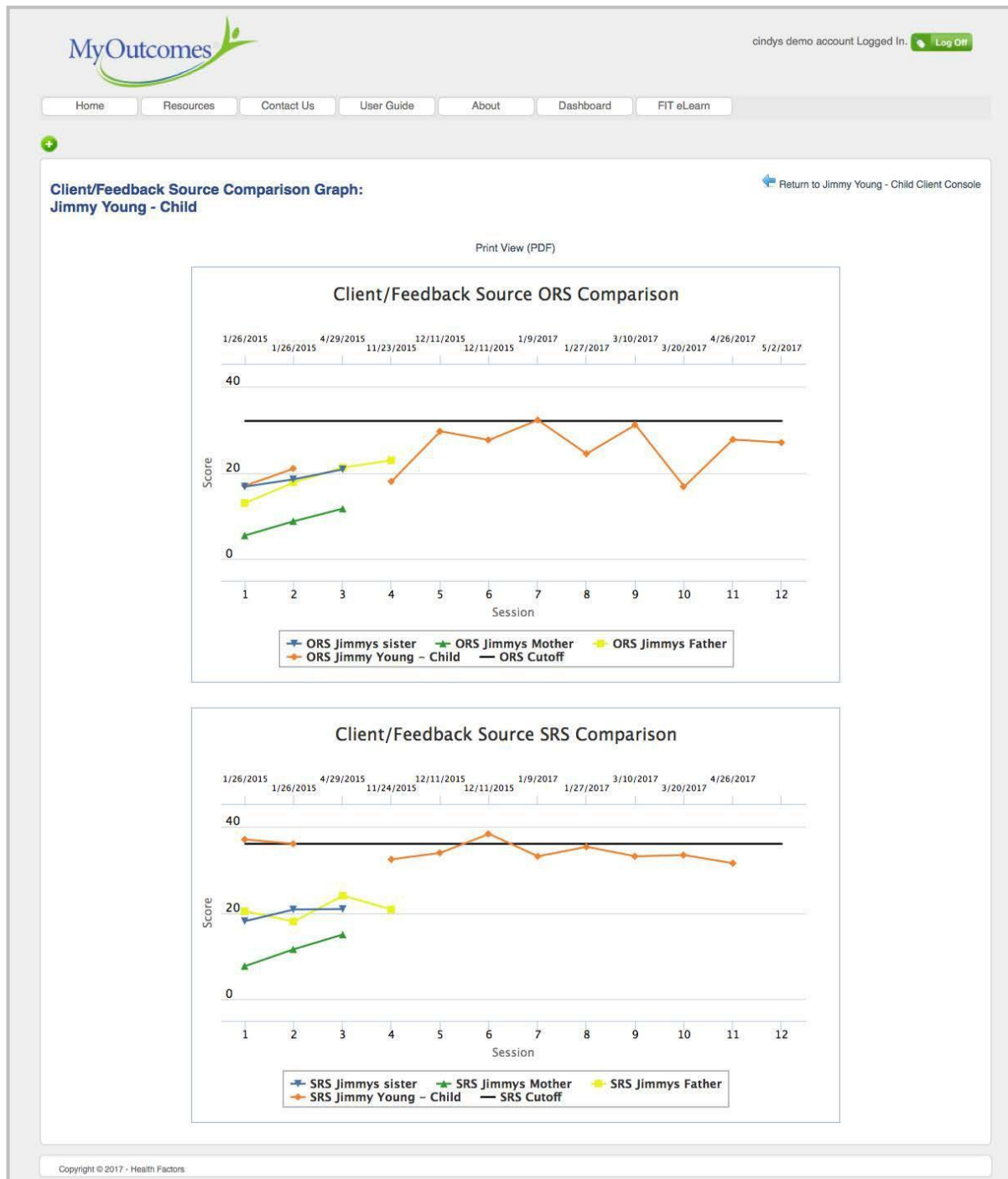
The graphs can be simplified by clicking on individual items in the legend to eliminate those items from the graph. The graphs can be printed out by clicking on the Print View (PDF) link located at the top of the page.

**Tip: The Client/Feedback Source Comparison Graph is available on the available on the closed/inactive client's console.**

## 10.4      Comparing Couple ORS/SRS Scores with Clinical Success Curves:

To compare couple progress, go to the Couple Console and click on the **Couple Progress Report** link at the top of the page. Two graphs will be generated. The **Couple ORS Comparison** displays ORS progress and the respective Success curves for the couple. The **Couple SRS Comparison** displays SRS scores as a function of session. These graphs can be printed out by clicking on the Print View (PDF) link located at the top of the page.

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Couple Progress Report: Henry & Sally

Print View (PDF)

Couple ORS Comparison (Henry,Sally)

Couple SRS Comparison (Henry,Sally)
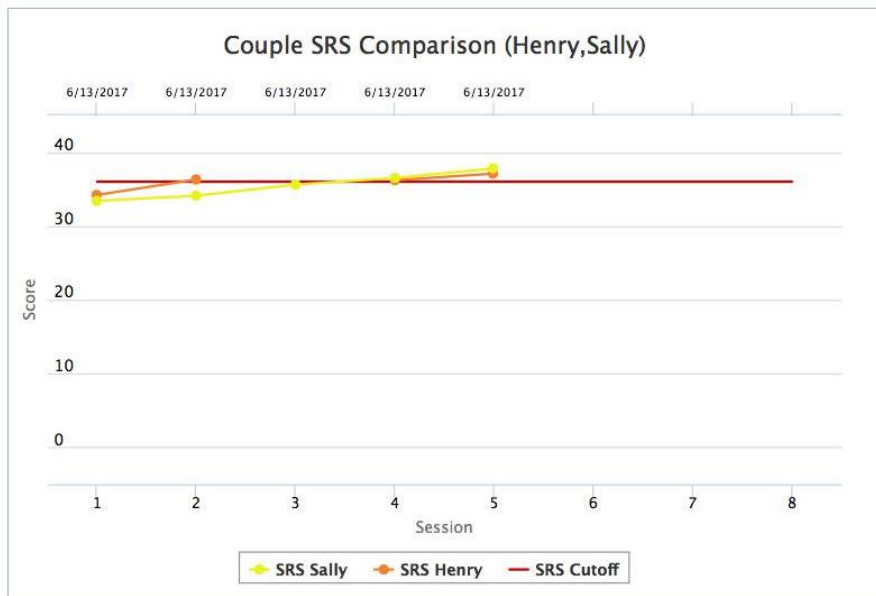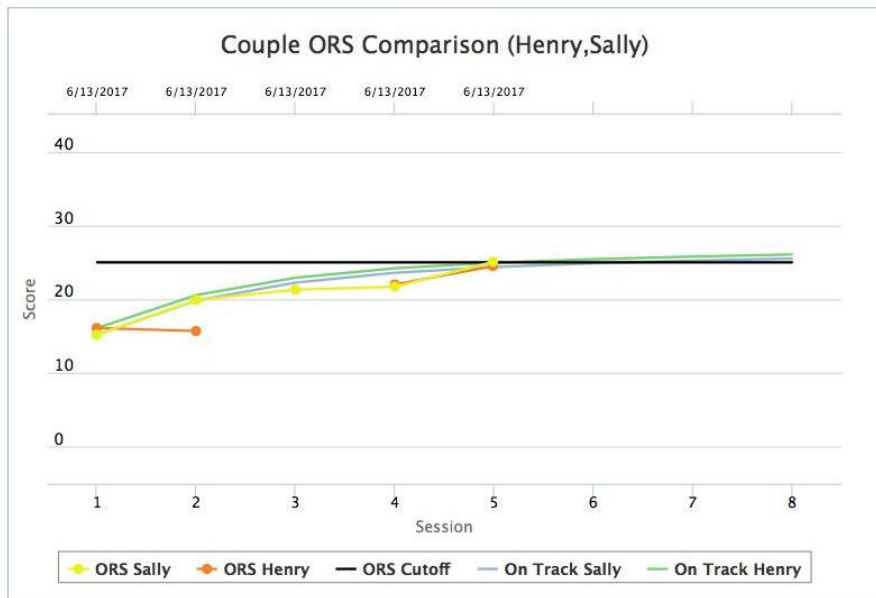
## 10.5 Comparing Group Therapy Members ORS/SRS Scores:

Click the Manage Groups link on the provider's Home Page. On the list of groups, select the group therapy group that is of interest. Click the **View** link found on the far right of the table, under the Comparison column. Two graphs, a **Group ORS Comparison** and a **Groups SRS Comparison,** will be generated. The graphs can be simplified by clicking on individual items in the legend to eliminate those items from the graph. The graphs can be printed by clicking on the Print View (PDF) link located at the top of the page.

## 10.6 Comparing Multiple Episodes (Cases) of Care for Same Client

Open the Client Console of an active client from either the Tree View or from the provider's Home Page. Select the View All Episodes of Care link at the top of the page. A page will open that has both the past CSR and the current CSR.

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## 10.7        Reactivation History

A summary of a client's reactivation history is available. Click on the Reactivation History link found at the top of the Client Console.

## 10.8        The Scatterplot:
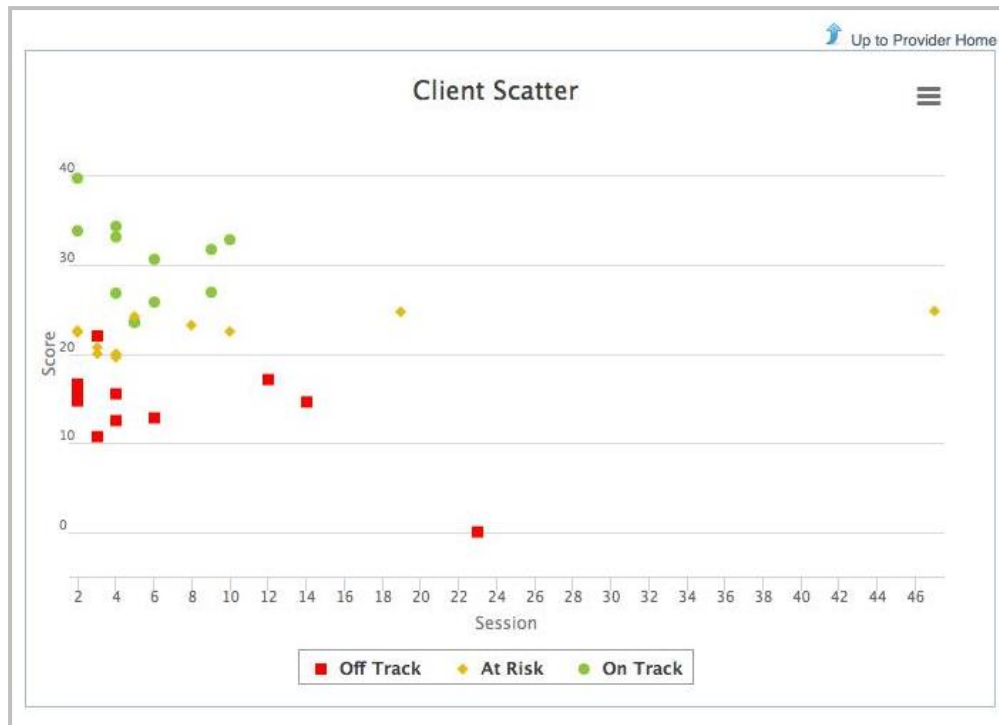


For a quick, easy-to-view assessment of the status of all clients as of their last sessions, providers have the option of creating a scatterplot. On the provider's Home Page, click on the **View Scatter** link found at the top left. A scatterplot will be generated plotting all of the clients' last ORS score as a function of their last sessions. The clients' current status is color-coded: red is for clients who are **Off Track** , yellow is for clients who are **At Risk**, and green represents clients who are **On Track.**

To view information for individual clients, roll the cursor over data points in the graph. Session, status, ORS score and ID are presented in the box.

To simplify and view the status of only one or two conditions, click the status conditions to be eliminated in the legend. For example, if you only wish to view clients who are Off Track, clicking on the At Risk and On Track items in the legend will remove all data points except for clients who are Off Track. Clicking on the items will return the data points in the graph.

Clicking on the three bars in the top right of the graph, presents the options of printing the graph or exporting it as file.

# CHAPTER 11
## The Dashboard

The Dashboard allows users to create Case Alerts, Key Performance Indicators (KPI), and ORS Audit reports. Report parameters can be set to create reports for specific administrators, supervisors, and providers, as well as limited to specific time periods. Agencies can use Tags to select data based upon predetermined characteristics. To access the Dashboard, click the Dashboard tab on the Navigation Menu at the top of the page.

### 11.1    Setting Dashboard Report Parameters:

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Report parameters allow the user to define the search criteria of the client data used for creating **Case Alerts**, **Key Performance Indicators**, and **ORS Audit** reports. Users may limit the selected population by using one or more of the filtering fields. The page opens to the default settings.

To limit the selected population to clients with a particular Tag applied, click in Tag text box and select the Tags from the drop down list. Tags are created at the owner level to allow for agency specific report parameter options and assigned to clients in the create and update client pages.

Tags allow analysis of client progress that is independent of administrator, supervisor, provider and client group.

To limit the selected population to clients assigned to a particular administrator, select that administrator from the administrator drop-down list. This filter is available to those logged in with an owner account.

To limit the selected population to clients assigned to a particular supervisor, select that supervisor from the supervisor drop-down list. This filter is available to those logged in with administrator or higher access.

To limit the selected population to clients assigned to a particular provider, select that provider from the provider drop-down list. This filter is available to those logged in with supervisor or higher access.

To limit the selected population to clients assigned to a particular Client Group, select that group from the Client Group drop-down list. This filter is available to those logged in with provider or higher access. The Client Groups available in this drop-down list are determined by the selected provider.

To change the selected population of clients based on case status, select the desired status from the Status drop-down list for active, inactive, or all. Selecting "Active" will limit the selected population to clients with active cases. Selecting the "Inactive" will limit the selected population to clients with inactive and closed cases. Selecting "All" will include all clients regardless of case status.

To include or exclude feedback resources from the selected population, check or uncheck the **Include Feedback Sources** box.

To limit the selected population to a specific age range, complete the Age Range field by selecting a "From" and "To" age from the drop-down lists.

To limit the selected population to cases whose first sessions began within a given date range, i.e. this week, last week, this month, last month, this year and last year, choose from the Select Date drop-down menu of preformatted date ranges. Customized date ranges are available when selecting the "Between" option from the drop-down menu. Complete the First Sessions Begins after fields by entering dates in MM/DD/YYYY format. Then to limit the selected population to cases whose latest sessions began within a given date range, complete the Latest Sessions Beginning After fields by entering dates in MM/DD/YYYY format.

After selecting the report criteria, click the Apply button. The dashboard will reload with a report on any cases that fit the report parameters in the Report section located under the Apply button.

## 11.2    Case Alerts:



The Case Alerts section allows users to generate a real-time list of potential cases of concern. By default, the population shown will be all active clients assigned to the user.

The following Case Alert options are available:

ORS Off Track: This alert generates a list of all clients within the selected population with two or more sessions and whose recent ORS score(s) has fallen below the Non-Success value, indicating the client is not progressing and may be at risk for deterioration and/or dropping out.

ORS At Risk: This generates a list of all clients with two or more sessions and whose recent ORS score falls between the Success and Non-Success values.

Cases without New ORS/SRS Data in 6+ weeks: This generates a list of cases that have had no ORS or SRS data administered in 6 or more weeks, indicating that these cases may no longer be active and may need to be deactivated. Note that 6 weeks is the default setting for this alert report. The time frame can be adjusted by typing in the text box below the alert criteria drop-down menu.

Cases with 3+ Skipped Sessions (both ORS and SRS): This generates a list of all clients within the selected population who have had three or more missed sessions.

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Cases with 3+ Consecutive Sessions At or Above Service Target Score: This generates a list of clients who have achieved expected benefits from therapy and may be ready to continue their recovery outside of therapy.

## 11.2.1    How to Select the Case Alert Criteria:

From the Dashboard, select the Case Alerts tab.

Use the drop-down menu to select the Case Alert type.

Select your report parameters, if any and click Apply.

A report of any cases that meet your criteria will appear in the Report section located under the Apply button. For your convenience, you can click on the client ID to access their CSR.

## 11.3    Key Performance Indicators (KPI) Report:

KPI reports provide a snapshot of progress reported by clients in the selected population and time period. By default, the population shown will all be active clients assigned to the user and will exclude clients with only one session of data. The Report Parameters section can be used to modify the selected population and time period for the KPI. After selecting the report criteria, click on Apply at the bottom of the page.

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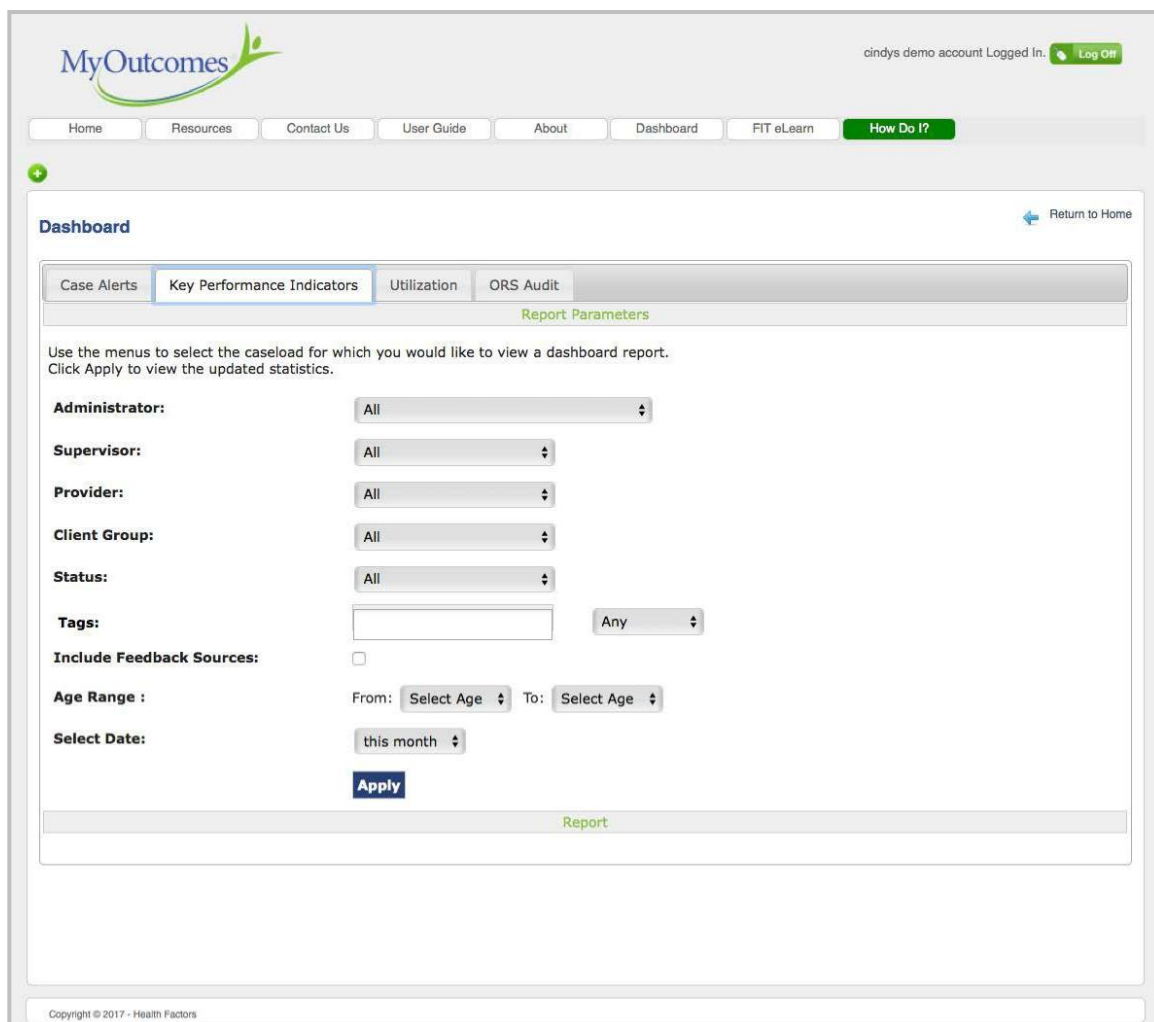
## 11.3.1    The KPI Real Time Data:

Average Overall (Raw) Change (ORS)

Average Session Targets (ORS) Percentage of Clients Scoring the Green Zone (successful outcome) at the last measurement

**Utilization Report:**

The utilization report shows the Number of Cases and the Total Number of Sessions that have been entered for the user and population selected in report parameters. By default, the population shown will all be active clients assigned to the logged-in user and will exclude clients with only one session of data.

**Time and Treatment Report:**

Summarizes, the number of clients who have been In Service for more than one year, In Service for more than two years, and the Average Treatment Duration.

**Recovery includes:**

Number with positive change of 5 or more
Number above clinical cut-off
Number above the clinical cut-off and/or have achieved a positive change of 5 points or more Number with no change
Number with deteriorating change of 5 points or more


## 11.4    The KPI Real Time Data:

In addition to key performance indicators and case alerts, you can generate an ORS Audit on the Dashboard. This feature allows MyOutcomes® owners, administrators, and supervisors to use current reporting parameters to identify clients who have had their past records changed by the provider after the client had completed the survey. There may be many legitimate reasons for changing a survey after-the-fact; however, there have been cases where there was concern that a provider might have altered client responses to improve the effect size in reports on provider performance.

To generate an ORS Audit, navigate to the ORS Audit dashboard.

Use the report parameters to look at programs or individual providers.

You can also audit survey changes by choosing between several preformatted date ranges.

When you click Apply, a report of any survey scores that have been updated and that meet your criteria will appear in the Report section located under the Apply button. The Report will list client ID, a count of surveys changed and the sessions. For your convenience, you can click on the client ID to access their CSR.


## 11.5    Utilization Report:

The utilization report shows the Number of Cases and the Total Number of Sessions that have been entered for the user and population selected in report parameters. By default, the population shown will all be active clients assigned to the logged-in user and will exclude clients with only one session of data.

Time and Treatment Report:

Summarizes the number of clients who have been In Service for more than one year, In Service for more than two years, and the Average Treatment Duration.

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## 11.6 ORS Audit:

In addition to key performance indicators and case alerts, you can generate an ORS Audit on the Dashboard. This feature allows MyOutcomes® owners, administrators, and supervisors to use current reporting parameters to identify clients who have had their past records changed by the provider after the client had completed the survey. There may be many legitimate reasons for changing a survey after-the-fact, however, there have been cases where there was concern that a provider might have altered client responses to improve the effect size in reports on provider performance.

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## 11.7 Export Dashboard Reports to Excel

For more granular analysis of Dashboard Reports, all reports can now be exported to Excel. Go to the Dashboard tab, for each of the 4 report tabs on the Dashboard page, you can generate a report with data. On the bottom of the page, you can click on the Export to Excel link. You will then get an excel file that contains raw results.

## 11.8 Printable Dashboard Reports

On the Home Page, click on the Dashboard tab. Once on the Dashboard page, scroll down to the bottom of the page and click on Printable Report View.

# CHAPTER 12
## Statistics & Reporting

The following sections describe how to access reports on client progress and outcome statistics. Reports provide up-to-date graphs on client progress. Reports and outcome statistics provide an effective way for therapists to prepare for their next session and for supervisors to monitor client progress and therapist performance. Reports can be printed to a hard copy or saved in PDF format.

### 12.1    Aggregate Statistics:

The Aggregate Statistics table provides an "at-a-glance" performance overview. Aggregate Statistics are available at the owner, administrator, supervisor and provider levels. The level of access to Aggregate Stats is determined by the user's role assignment. By default, statistics of Feedback Sources are excluded. Feedback Source data can be included in the Aggregate Stats by clicking on the **Include Feedback Sources** option located on the upper left of the Aggregate Stats page. The Aggregate Statistics table separates outcome statistics for active and inactive clients.



**Aggregate Stats: Cindys Demo Account**
Print Stats | Include Feedback Sources | Adult Only | Adolescent Only | Child Only |

Tags: [          ]   Any ⇕   Apply Tags

These stats are a cached copy generated on 1/9/2020 1:41:39 AM  **Refresh**

Mouse over terms to see definitions

|  |  | Active | Inactive |
|---|---|---|---|
| **Average Change** | Average Intake ORS (based on first session) * | 22.8 | 19.6 |
|  | Average Most Recent ORS ** | 26.6 | 23 |
|  | Pre-Post Effect Size (ES) ** | 0.54 | 0.45 |
|  | Average Intake SRS * | 33.8 | 33.9 |
| **Change vs. Service Targets** | Relative Effect Size ** | -0.06 | -0.18 |
|  | % of Clients Reaching Service Target ** | 60.27 | 54.55 |
| **Time and Treatment** | In Service for more than one year ** | 661 (99.8 %) | 6 (0 %) |
|  | In Service for more than two years ** | 573 (86.6 %) | 3 (9.1 %) |

**NOTE:** If you are using Tags with your clients, you will need to enter the same Tags when creating Feedback Source accounts. If Feedback Sources don't have the Tag(s) that the client has, they will not show in your Aggregate Stats when breaking your data down by that Tag.

Mouse over any of the terms on the table and a pop-up explanation of the term will come up.
Definitions for the terms can also be found in Appendix B.

From the Tree Directory, right click on the user name.

Select (depending on level of access) **<User> Statistics** from the drop-down menu.

Alternatively, from the user Home Page, click on the **<User> Stats** link in the upper left.

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The owner, administrator(s) and supervisor(s) can also access stats by clicking on the blue spread-sheet icon in the Stats column on their Home Page.

The Aggregate Stats page will load in the main content viewing area.

In the upper left corner are options to Include Feedback Sources, Apply Tags or Print Stats. Apply Tags limits the aggregate statistics to the selected category. Print Stats is for directly printing the table.

**Tip: The Aggregate Stats can be broken down as a function of whether clients are children, adolescents, adults or couples. This is a great feature for both individual therapists and agencies, who cater to multiple client types, to tease out and review progress of these different groups. To select subgroup, click on appropriate link found in upper-left corner of Aggregate Stats page.**

**Tip: The use of Tags is a great way to breakdown data for tracking groups of individuals with predefined characteristics, e.g. year of treatment, anger issues, substance abuse, etc. Entering one or more Tags will limit the Aggregate Stats displayed to only those criteria.**

To view Aggregate Statistics in spreadsheet format, click on the Export to Text/ Export to Excel located below the Aggregate Statistics table under Export Raw Data.

Return to the user home page by clicking on the Return to <User> Home link on the upper right of the Aggregate Stats page.

## 12.2    Client Status Reports (CSR):

The CSR is available in PDF format allowing for integration into electronic or paper charts. The CSR consolidates up-to-date graphs and the most recent scores, feedback messages, and alerts.
For Printed Copy of Image File of the CSR:

1.  For a PDF: Navigate to the Client Console or click the Status icon at the end of the client's row on the Provider's Home Page list of clients.

    Click on the Chart/Score/Feedback Print View (PDF) link located above the CSR and select open or save.

2.  Direct Printing: Click on three bars in upper-right corner of the CSR and select the Print option.

3.  Image File: Click on three bars in upper-right corner of the CSR and select Export to Image.

## 12.3    Feedback Source Reports:

It is possible to create PDF files of clients' ORS/SRS scores compared to any Feedback Sources they may have. Navigate to the Client/Feedback Source Comparison Graph and click the Print View (PDF) link at the top of the display.

## 12.4    Couple Feedback Reports:

To create a PDF file of a Couple Progress Report, navigate to the Couple Progress Report: <Couple> page. Click the Print View (PDF) link found above the graphs.

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## 12.5    Client Statistics Summary Report:

In the upper left on the Client Console, there is a Client Summary that provides the last session ID or number, the last session ORS score and an arrow (up, down, or sidewise) indicating whether the score was higher, lower, or the same as the previous session. There is also an icon that resembles a calculator called **View Client Summary Statistics.** To view a statistical summary of a client's progress, click on the view summary icon. A Client Summary page will be displayed.

## 12.6    Export Stats now includes Client ID Creation Date, Last ORS Score & Last ORS Date to export raw scores

When on the Aggregate Stats page, scroll down to the bottom of the page and you will see Export Raw Data- below this is the Export to Excel/CSV link. Once you click on the Export to Excel link, it will generate statistics including Client ID, Creation Date, Last ORS score, and Last ORS Date.

# CHAPTER 13
## Best Practices

## 13.0    A Typical Session

At the beginning of each session, the ORS is presented to the client. This simple 4-item, self-report measure, designed with the frontline clinician in mind, takes less than a minute to complete. It measures individual functioning, interpersonal relationships, social role performance, and overall psychological well-being that may not be captured by the other three measures.

A few minutes before the session ends, the SRS is administered and discussed. The SRS is a visual analogue scale that measures four aspects of Borden's traditional description of the therapist-client alliance. These measure the relational bonds, as well as the degree of agreement between the client and clinician regarding the goals and tasks of treatment.

## 13.1    Six Steps to a Simple Session

**Step 1:** Locate and click on the client's ID or name to display the client's console.

**Step 2:** Administer the ORS by clicking the ORS icon. Alternatively, if using the paper version, click the Paper ORS icon to manually enter scores from the paper version of the ORS into MyOutcomes®.

**Step 3:** Complete the ORS. Ask the client to make sure to click the checkmark icon to save the survey results. MyOutcomes® automatically generates a Client Status Report with subscale scores, a total score, and red, yellow, and/or green Feedback Signals. These results can be used to encourage discussions between providers and clients about their treatment.

**Step 4:** Administer SRS by clicking on the SRS icon. If using the paper version, click on

the Paper SRS icon to manually enter scores from a paper version of the SRS into MyOutcomes®.

**Step 5:** Complete the SRS. Ask the client to make sure to click the checkmark icon to

save the survey results. MyOutcomes® automatically generates a Client Status Report with subscale scores, a total score, and red, yellow, and/or green Feedback Signals. The client feedback results can be used to stimulate constructive discussions between providers and clients to manage, foster, and strengthen their alliance.

**Step 6:** You may also want to add a note about the session. To do so:
- Click on Update Past Session above the Client Status Report.
- At the session list Page, on the far right you will see "View Note". Click here to add a note, maximum 255 characters.
- Click Save.
- Click Done to close the session list.

You may also want to compare past session subscale scores. You can do this by clicking on Com-pare Past Session Data, where you can choose up to 4 sessions for side-by-side comparison.

**MyOutcomes**®

# Appendix B

## Glossary of Aggregate Stats Terms:

### Average Change

**Average Intake (Session Rating Scale) SRS:** The average score for all clients on SRS at first session (18-20 is typical for outpatient mental health settings).

**Average Most Recent ORS:** The average last Outcome Rating Scale (ORS) score. Provides a quick look at the current effect that therapy is having across clients.

**Pre-Post Effect Size (ES):** Provides an estimate of client progress compared to the progress of those in clinical trial no-treatment control groups. The ES for no treatment controls is typically .20. Treatment groups in clinical trials are usually reported to have a .80 ES. This difference between treatment and no-treatment has led to the conclusion that therapy is 4 times more effective than no treatment. ES estimates greater than .20 indicate that client improvement is better than that of no treatment controls.

**Average Intake SRS:** The average SRS score for all clients' administration at first session.
The Average Intake SRS indicates whether the therapist is able to elicit the feedback needed to improve engagement (36 is the cutoff). An intake SRS below the cut-off indicates an ability to elicit feedback

Excludes sessions where SRS was skipped.

### Change vs. Session Target

**Relative Session Effect Size:** Compares client progress to the average improvements made by clients in MyOutcomes® extensive database with identical intake scores. The Relative Session Effect Size provides a measure of the effect of treatment for clients at the same point in treatment. A positive relative size means an effect above average, a negative relative effect size means an effect below average. A relative effect size of 0 means the effect is average compared to the norm.

**Relative Effect Size:** The Relative Effect Size provides a measure of the effect of treatment compared with the grand mean (mean of the mean) of the effect of treatment for other clients in MyOutcomes® extensive database with identical intake ORS scores. A positive relative effect size means an effect above average, a negative relative effect size means an effect below average. A relative effect size of 0 means the effect is average compared to the norm. A zero reflects the average performance of those individuals who started with the same ORS intake score. Values above or below zero reflect deviations from the average.

**% of Clients Reaching Service Target:** Shows the percentage of clients reaching Service Target (Green Zone) at their last measurement. The Service Target is the ORS score predicted at the end of successful treatment and reflects reliable change greater than chance, maturation, and measurement error. Results derived from "active" clients, who haven't completed treatment and haven't reached their full recovery potential, will typically show lower values than inactive clients.

### Sessions

**Total Sessions:** The total number of scheduled sessions for clients of this provider, supervisor, administrator, program and/or agency. This number includes clients who did not attend the session or skipped taking both the ORS and SRS.

**Total Attended Sessions:**

ORS and/or SRS were completed in cases for this provider, supervisor, administrator, program and/ or agency.

**Average Number of Sessions:** Average number of sessions with clients. Cases with only one session are excluded.

**Total Skipped Sessions:** The total number of sessions that are completely skipped with this provider, supervisor, administrator, program or agency.

**DNA – Did Not Attend:** This is the total number of sessions that clients skipped and were marked DNA for this provider, supervisor, administrator, program or agency.

**Total Cancelled Sessions:** The total number of sessions that have been cancelled for this provider, supervisor, administrator, program or agency.

**Percent Skipped Sessions:** Calculated by dividing the number of skipped sessions by the total completed sessions with this provider, supervisor, administrator, program or agency.

## Time and Treatment

**In Service for more than one year: Number of cases (percentage of all cases) open to service for** More Than One Year. Counts cases open for more than 365 days.

**In Service for more than two years:** Number of cases (percentage of all cases) open to service for More Than Two Years. Counts cases open for more than 730 days.

**Average Treatment Duration:** The average time from the first ORS session date to the most re-cent ORS session date.

## Validity Indicators:

**ORS Over 35:** Total number and % of cases whose intake ORS is 35.

**Intake ORS Over Clinical Cut Off:** % of cases whose intake ORS is over the clinical cutoff.

**Saw Tooth Pattern:** Number of and % of all cases whose last for ORS scores went up and down by 6 or more points and whose last ORS score was lower than the service target.

MyOutcomes®

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# Glossary of Terms:

**Aggregate Statistics** – Client data collected by provider and/or agency that summarizes the therapeutic progress in a number of categories.

**Administrator** – The individual who oversees one of more supervisors and their providers. Because of their position in MyOutcomes® role-based hierarchy, administrators are able to access data associated with their supervisors, associated providers and associated clients.

**Client** – The individual(s) receiving therapy. Clients are only able to view their data.

**Client Console** – The page in MyOutcomes® that clients see, which provides Client Status Report as well as provides them access to the ORS and SRS scales.

**Client Group** – Providers are required to create at least one client group. Client Groups are mechanisms by which providers can group their clients based upon some common characteristic. For example, one client group might be for clients receiving group therapy, another group might be for couple counseling and a third might be for adolescents.

**Client Status Report** – Client Status Report, or CSR, is the graphical and tabled summary of the clients' ORS and SRS scores as a function of therapeutic session.

**Dashboard** – The Dashboard is a mechanism by which agency owners, administrators, and supervisors can monitor client progress, as well as the performance of staff under their supervision.

**Home Console** – Also known as the Home Page, this is a table that summarizes those supervised or treated by an owner, administrator, supervisor, or provider. In other words, the provider's home console lists all of their clients, the supervisor's home page lists all of the providers under their supervision, etc. The home console also provides links to critical functions associated with the user's role.

**Main Content Area (MCA)** – The main content area is the portion to the right of Tree Directory.

**Outcome Rating Scale (ORS)** – The ORS is administered at the beginning of a therapeutic session. It provides insight into the progress that a client is making.

**Owner** – The individual who holds the MyOutcomes® license. Sometimes the owner and the administrator may be one and the same. The owner has access to all areas of MyOutcomes. There are a number of setup and reporting features that are determined by the owner.

**Provider** – The individual provider therapy to a client.

**Session Rating Scale (SRS)** – The SRS is administered towards the end of a therapeutic session. It provides insight into the therapeutic relationship.

**Supervisor** – The individual who oversees one or more providers. They are able to access and create reports of the providers and their clients' performance and progress.

**Tree Directory** – The portion of the screen that is to the left of the MCA.

**Upper Navigation Menu** – The area towards the top of the screen that has several functional tabs including the tab accessing the Dashboard.