

MyOutcomes Administration Guide For Provider Agency Users

Introduction

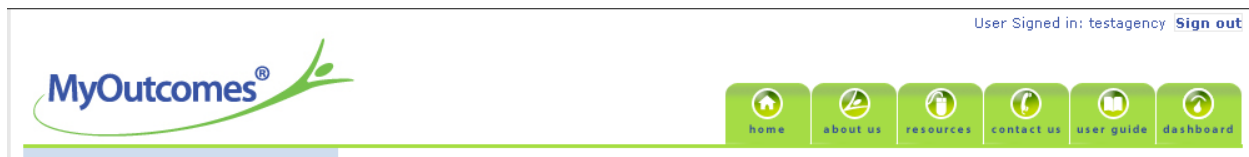
The purpose of this guide is to provide detailed information for new and existing users of MyOutcomes on many of the basic tasks that can be performed within MyOutcomes. It is always a good idea to check with your Agency's management to ensure that any specific processes mentioned in this document are consistent with protocols implemented by your agency.

This guide is broken down into four distinct sections, one each for Administrator Functions, Supervisor Functions, Provider Functions (Providers are what we would consider clinical staff), and one for Client-specific Functions. You can quickly skip down to the section which applies most to your use of MyOutcomes.

Administrator Functions

As a new administrator, when you log in to MyOutcomes for the first time chances are there are no clients and no clinicians. In order to configure MyOutcomes properly, there are a few tasks you will want to perform before you do anything else.

First and Foremost, you will want to familiarize yourself with the MyOutcomes site and how it works. Navigating the site can be done through any of the buttons at the top of your screen.

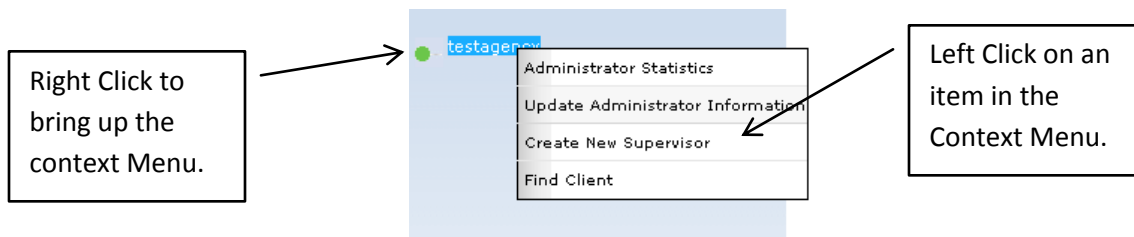


These buttons are fairly self-explanatory so we won't spend too much time on them in this document. Two specific buttons will be invaluable to you as you use MyOutcomes: the interactive "**User Guide**" and the "**Dashboard**".

The **User Guide** is an interactive series of videos that walks you through much of the functionality of the MyOutcomes system. It is well worth your time (and that of anyone else using MyOutcomes) to view these interactive training modules.

The **Dashboard** offers some concise statistical information for your agency that you can use to monitor the performance of your clinical staff. More information regarding the Dashboard can be found in the document titled “**MyOutcomes Quick Start Guide with Dashboard**”, available from the Riverhaven Coordinating Agency website at www.riverhaven-ca.org/MyOutcomes.aspx.

The process of configuring your agency’s account settings in MyOutcomes is fairly simple. There are four options on the context menu available to administrators when you right click on your agency’s name. These available tasks are explained in some detail below.



Administrator Statistics

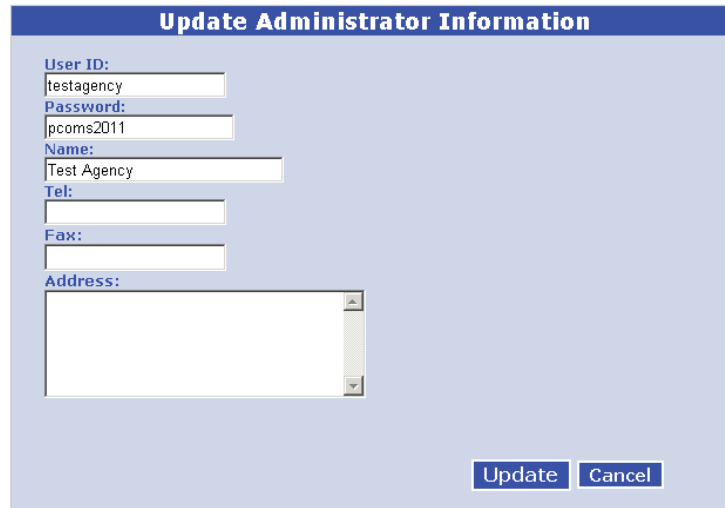
When you right click on your agency name, it brings up a context menu as mentioned above. If you then left click on the **Administrator Statistics** option you will bring up the **Aggregate Stats** page. Here you can view statistics for your provider agency aggregated across all clinicians and all clients in your agency. The statistics are broken down into **Active** and **Inactive** columns for comparative purposes. More information on these **Aggregate Statistics** can be found in the document titled “**MyOutcomes Aggregate Statistics Report Definitions**” available from the Riverhaven Coordinating Agency website at www.riverhaven-ca.org/MyOutcomes.aspx.

testagency			
Aggregate Stats			
Click here to include collateral rater data in the aggregate statistics			
Category	Statistic	Active	Inactive
Overall Change	Average Intake ORS	0.0	0.0
	Average Most Recent ORS	0.0	0.0
	Average Raw Change	0.0	0.0
	Uncorrected Effect Size	0.0	0.0
Change vs. Session Targets	Average Change Index	0.0	NA
	Corrected Effect Size	0.0	NA
Change vs. Service Targets	Average Change Index	0.0	0.0
	Corrected Effect Size	0.0	0.0
	% of Clients Reaching Service Targets	0.0	0.0
Sessions	Average Sessions	0.0	0.0
Clients	Total Clients	0	0
Click on the item to see its description.			

Update Administrator Information

This option allows an administrator to update certain pieces of his or her own information; namely the User ID, Password, Agency Name and such. This is particularly useful when there is a change in some piece of agency information, or when changing a password or contact information for an Agency.

Right click on the Agency Name and then select Update Administrator Information from the context menu that appears to be taken to the Update Administrator Information page.



The screenshot shows a web form titled "Update Administrator Information". It contains several input fields: "User ID:" with the value "testagency", "Password:" with the value "pcoms2011", "Name:" with the value "Test Agency", "Tel:", "Fax:", and "Address:". At the bottom right, there are two buttons: "Update" and "Cancel".

Create New Supervisor

Selecting the Create New Supervisor option brings up the New Supervisor Information page where you will enter all the appropriate required and optional information for the supervisor.

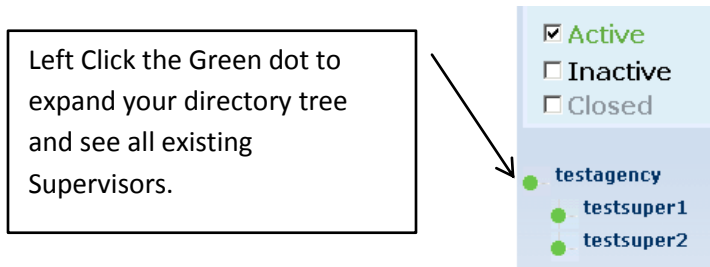


The screenshot shows a web form titled "New Supervisor Information". It contains several input fields: "User Name:" with a red asterisk indicating a required field, "Password:", "Name:", "Tel:", "Fax:", and "Address:". At the bottom, there are two buttons: "Insert" and "Cancel".

As with all screens in MyOutcomes, it is important to be as thorough and accurate as possible when filling in any requested information.

Once you've entered all the required and optional information, click the **Insert** button to complete the process. In the example, we've used "testsuper1" and "testsuper2" as the names of two supervisors. If you click on the

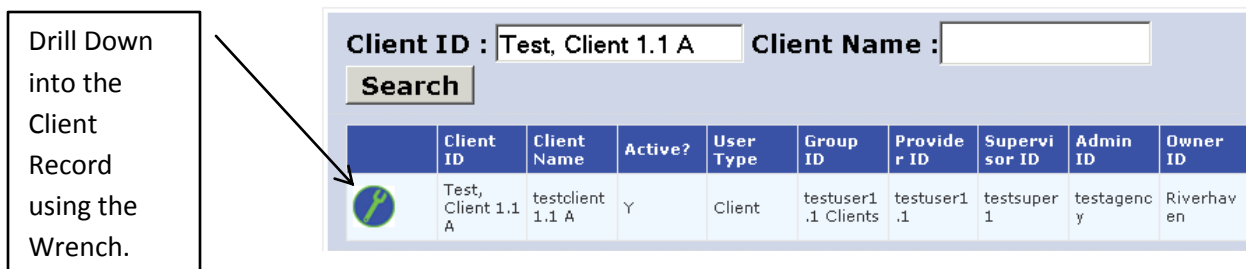
green dot to the left of your agency name, you expand the directory tree to show supervisors and users assigned to your agency. The **testsuper1** and **testsuper2** supervisor accounts are now visible.



Find Client

This option allows an Administrator to search for a specific client, if you know that client’s Unique ID and/or the Client Name. If the client’s information is entered correctly, the client’s information will be displayed as shown below. To drill down into the client’s record, simply click on the wrench icon to the left of the client’s name.

Search For Clients



NOTE: An Agency Administrator has the ability to see all clients associated with all clinical staff regardless of the supervisor with whom a specific clinical staff is associated.

The Directory Tree

In MyOutcomes, most of the actions supervisors and users will take can be performed from the directory tree, located on the left side of the MyOutcomes user interface. As you can see from the below image, there are many components to the directory tree.

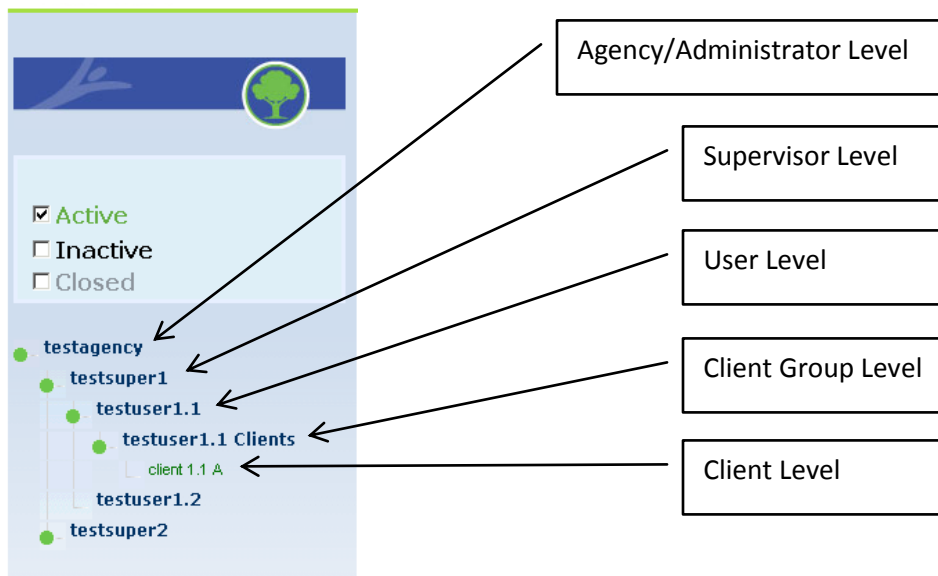
Each level of the directory tree allows you to “Drill Down” more deeply into your agency. The first level is the **Agency or Administrator Level** which has already been set up by Riverhaven when you log in to MyOutcomes for the first time. Typically, there is only one identified MyOutcomes Administrator in a specific agency; usually the Site Manger or designee.

The second level is the **Supervisor Level**. As an administrator, you have the ability to set up as few or as many supervisors as you like. In the beginning, Riverhaven may have set up your supervisor level, but you can add to or change it as necessary. Each Supervisor is responsible for supervising one or more Clinical staff or Providers, as MyOutcomes calls them. Depending on the size of your organization, you may have many supervisors.

The third level is the **User Level**. At this level, a supervisor can see each user assigned to his or her supervisor group. The supervisor can also add or delete users as necessary. Depending on the size of your organization, a supervisor may have many users assigned to him or her.

The fourth level is the **Client Group Level**. Here you can set specific groups of clients for a clinician. You use this level to organize different types of clients under a clinician in some specific, meaningful way such as clients by a specific group or type of group, treatment modality, diagnosis, etc.

The fifth level is the **Client Level**. At this level a user or supervisor can see each client assigned to a specific clinician. The user or supervisor can also add, change, transfer or delete a client as necessary.

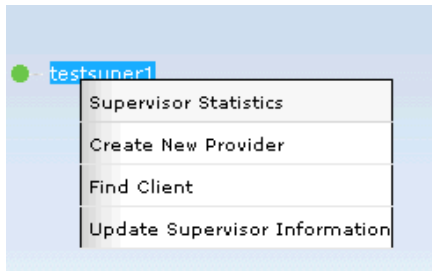


Supervisor Functions

There are a number of tasks that can be accomplished by a supervisor in MyOutcomes. It is important to understand the purpose of a supervisor in MyOutcomes in order to best use the supervisor account.

In a clinical setting, a supervisor is a person who oversees the clinical work performed by a person providing services to a client. A supervisor may oversee one or many clinical staff. MyOutcomes works on the same principle. A Supervisor has access to all of the clinical staff assigned to them as well as all of the clients assigned to those clinical staff.

There are four specific tasks that a supervisor can do in MyOutcomes; all of which can be accomplished by right-clicking on the supervisor's name. In our example below, right clicking on "testsuper1" brings up a context menu with four options.



Supervisor Statistics

Selecting the Supervisor Statistics option brings up the Aggregate Stats page. The Aggregate Stats page identifies all of the clients assigned to all of the clinicians that are part of this supervisor's group. The statistics are broken down into Active and Inactive columns for comparative purposes. More information on these Aggregate Statistics can be found in the document titled "MyOutcomes Aggregate Statistics Report Definitions" available from the Riverhaven Coordinating Agency website at www.riverhaven-ca.org/MyOutcomes.aspx.

Create New Provider

Selecting the Create New Provider option brings up the New Provider Information page where you will enter all the appropriate required and optional information for the clinician. It is worthwhile to enter as much information as possible here as this information can be used for statistical purposes.

A screenshot of a web form titled "New Provider Information". The form is divided into several sections. The top section contains "User ID:" (text input), "Password:" (text input), "Date of birth:" (three dropdown menus for day, month, and year), and "Gender:" (dropdown menu). The middle section contains "Type of provider:" (dropdown menu with "None" selected), "Primary therapy modality:" (dropdown menu), "Years of experience:" (dropdown menu), "Location:" (dropdown menu), "Name:" (text input), "Tel:" (text input), "Fax:" (text input), and "Address:" (text input). The bottom section contains four groups of radio button options for ethnicity: "Mexican", "Puerto Rican", "South American", and "Other". Each group has three options: "Yes", "No", and "Unknown/Refused". At the bottom right of the form are two buttons: "Insert" and "Cancel".


Find Client

This option allows a supervisor to search for a specific client assigned to one of the supervisor's clinical staff (or Providers, as MyOutcomes calls them), if you know that client's Unique ID and/or the Client Name. If the client's information is entered correctly, the client's information will be displayed as shown below. To drill down into the client's record, simply click on the wrench icon to the left of the client's name.

Search For Clients

Drill Down into the Client Record using the Wrench.

Client ID : **Client Name :**

	Client ID	Client Name	Active?	User Type	Group ID	Provider ID	Supervisor ID	Admin ID	Owner ID
	Test, Client 1.1 A	testclient 1.1 A	Y	Client	testuser1 .1 Clients	testuser1 .1	testsuper 1	testagency	Riverhaven

Since a supervisor can only see clients associated with one of the supervisor's clinical staff, searching for a client that is not associated with one of the supervisor's clinical staff will return a message indicating that your search did not return any results. **NOTE: An Agency Administrator has the ability to see all clients associated with all clinical staff regardless of the supervisor with whom a clinical staff is associated.**

Search For Clients

Client ID : **Client Name :**

Sorry! Your search did not return any results.

Update Supervisor Information

This option allows a supervisor to update certain pieces of his or her own information; namely the User ID, Password, name and such. This is particularly useful when there is a change in supervisor roles, such as when one supervisor is replaced by another supervisor. Rather than create a new supervisor and then transfer clinical staff (Providers as MyOutcomes calls them) and clients to the new supervisor in MyOutcomes, an administrator or supervisor can change existing supervisor information to match agency needs.

Update Supervisor Information

User ID:
testsuper1

Password:
pcoms2011

Name:
Test Supervisor

Tel:
[]

Fax:
[]

Address:
[]

[Update] [Cancel]

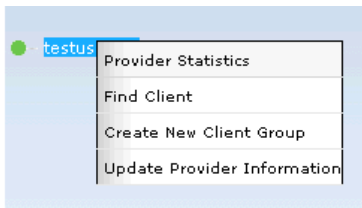
As with all screens in MyOutcomes, it is important to be as thorough and accurate as possible when filling in any requested information.

Provider (Clinical Staff) Functions

As mentioned previously, MyOutcomes refers to clinical staff providing direct services to clients as Providers. The two have been used interchangeably in this document to help ensure clarity.

Clinical staff are the backbone of MyOutcomes and it is the work they perform within MyOutcomes that ensures the integrity of the statistical information that MyOutcomes can produce. Clinical staff are responsible for all aspects of managing their client load within MyOutcomes, from initial creation of a client group to adding a new client, to understanding and using the statistical outcomes information available in MyOutcomes.

Right-clicking on a Provider's name brings up a context menu with a number of available options used by the clinician to help manage tasks in MyOutcomes.



Provider Statistics

Left clicking on the **Provider Statistics** option brings up the **Aggregate Stats** page. Here you can view statistics for all clients associated with the provider (or clinician). The statistics are broken down into Active and Inactive columns for comparative purposes. More information on these Aggregate Statistics can be found in the document titled "**MyOutcomes Aggregate Statistics Report Definitions**" available from the Riverhaven Coordinating Agency website at www.riverhaven-ca.org/MyOutcomes.aspx.


Find Client

This option allows a clinician to search for a specific client assigned to that clinical staff (or Providers, as MyOutcomes calls them), if you know a client's Unique ID and/or the Client Name. If the client's information is

entered correctly, the client's information will be displayed as shown below. To drill down into the client's record, simply click on the wrench icon to the left of the client's name.

Search For Clients

Client ID : Client Name :

	Client ID	Client Name	Active?	User Type	Group ID	Provider ID	Supervisor ID	Admin ID	Owner ID
	Test, Client 1.1 A	testclient 1.1 A	Y	Client	testuser1 .1 Clients	testuser1 .1	testsuper 1	testagency	Riverhaven

Drill Down into the Client Record using the Wrench.

Since a clinician can only see clients associated with their user, searching for a client that is not associated with them will return a message indicating that the search did not return any results.

Search For Clients

Client ID : Client Name :

Sorry! Your search did not return any results.

Create New Client Group

All clients entered into MyOutcomes must be attached to a specific Client Group. Further, each clinician might have multiple Client Groups. For example, you might have a different Client Group for each type of treatment modality or a different Client Group for individual treatment vs. group treatment.

To create a new Client Group, select the Create Client Group option from the context menu displayed when you right-click on your provider name. The below page will be displayed. Fill in all information as completely as possible. Assigning a password is not required and should rarely, if ever be used when creating a Client Group.

New Client Group Information

Group Name:

Password:

Name:

Tel:

Fax:

Address:

Update Provider Information

This option allows a clinician to update certain pieces of his or her own information; namely the User Name, Password, name and such. It is important that as much information as possible be entered as accurately and as completely as possible. MyOutcomes uses much of the information in this section (with the exception of names) for statistical reporting in the aggregate.

Update Provider Information

User Name: testuser1.1*

Password: pcoms2011

Date of birth: [dropdown] [dropdown] [dropdown]

Gender: [dropdown]

Type of provider: None

Primary therapy modality: [dropdown]

Years of experience: [dropdown]

Location: [dropdown]

Name: [text input]

Tel: [text input]

Fax: [text input]

Address: [text input]

Yes No Unknown/Refused

Mexican

Yes No Unknown/Refused

Puerto Rican

Yes No Unknown/Refused

South American

Yes No Unknown/Refused

Other

Yes No Unknown/Refused

Update **Cancel**

As with all screens in MyOutcomes, it is important to be as thorough and accurate as possible when filling in any requested information.

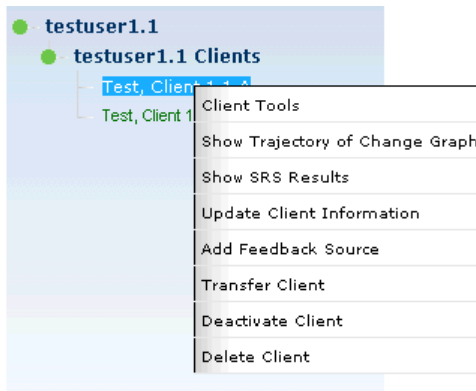
Once you've entered all necessary and optional information, click the Update button to complete the task.

Client-Based Functions

Across all levels of MyOutcomes, and within the limits of the system's security framework as noted previously, there are specific activities associated with a client that can be completed. Depending on your specific access to MyOutcomes (e.g. whether you are an Administrator, Supervisor, or Provider, as MyOutcomes refers to clinicians) you can complete a number of client-based tasks simply by right-clicking on the client in question and bringing up its context menu.

Provider Client-Based Functions

There are eight specific tasks that a clinician (Provider as MyOutcomes calls them) can do when right-clicking on a client to display the context menu. Each is described in detail below.

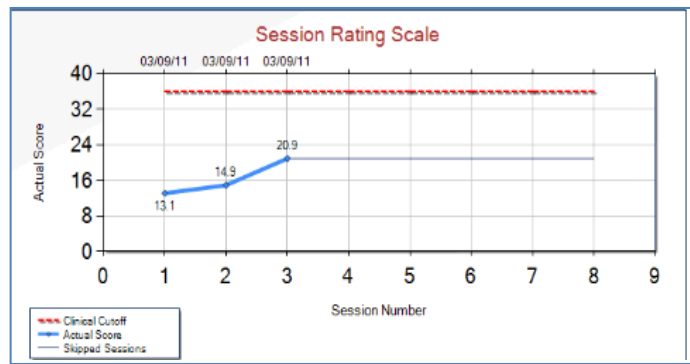
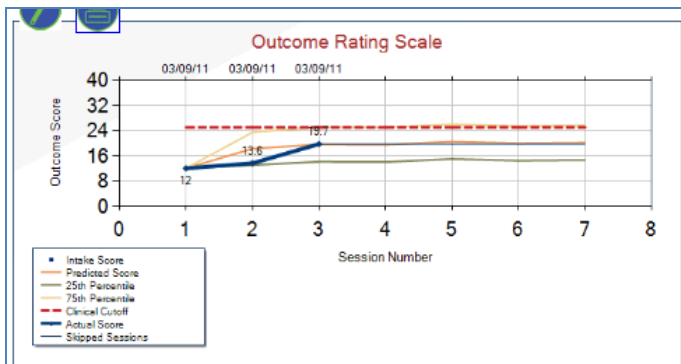


Client Tools

This option takes you to the client's ORS and SRS administration page. Here you can ask the client to complete the ORS/SRS, update previously submitted ORS/SRS scores, display the Trajectory of Change Graph and view client-specific statistics.


Show Trajectory of Change Graph

The Trajectory of Change graph displays the client's current scores relative to national scores for both the ORS as well as the SRS. These are covered in more detail as a part of CDOI training components.



Show SRS Results

This option displays an aggregate of the client's SRS scores as compared to national statistics contained within the MyOutcomes database. More information on these statistics can be found in the document titled "MyOutcomes Aggregate Statistics Report Definitions" available from the Riverhaven Coordinating Agency website at www.riverhaven-ca.org/MyOutcomes.aspx.

 Test, Client 1.1 A

Stats	
Status	Activation Status: Active Intake Date: 3/9/2011 2:53:52 PM
Overall Change	Intake ORS: 12.0 Last ORS: 19.7 Raw Change: 7.7 Uncorrected Effect Size: 1.0
Change vs. Session Target	Session Target ORS: 19.6 Last ORS: 19.7 Change Index: 0.1 Corrected Effect Size: 0.0
Change vs. Service Target	Service Target: 20.1 Last ORS: 19.7 Change Index: -0.4 Corrected Effect Size: -0.1

Click on the item to see its description.

Update Client Information

This option allows you update a specific client's information, including modifications to Client ID, Name, etc. If you entered the client ID or name incorrectly, this is where you would go to make corrections.

Update Client
*Required

Client ID : *

Client Name:

Date of Birth: *

Gender:

Survey Type:

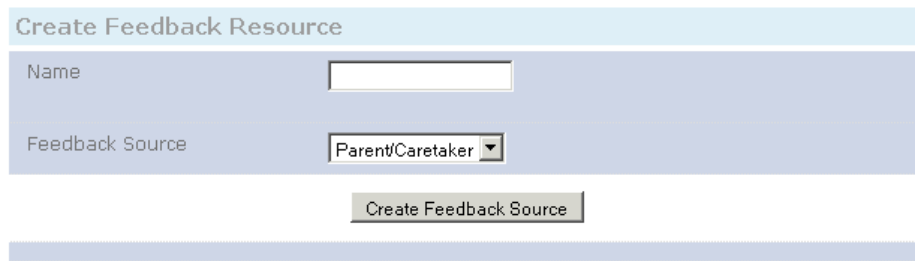
Adults/Adolescents (ages 13+)
 Children (ages 6 - 12)

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

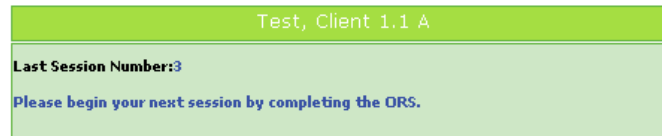
Add Feedback Resource

The Feedback Resource is a relatively new feature that can be used when a client reports ORS scores significantly higher than what would be expected. While this is typical of mandated clients, it can be used for clients who are entering treatment with the belief that things in their life are fine, but someone else thinks they need treatment. Simply put, it gives the client the opportunity to take the ORS as though he or she were the person in question (wife/husband/probation officer, etc.). This then allows a clinician (and the client) to compare the client's ORS scores with the feedback resources scores; a useful tool in therapy.

To create a Feedback Resource, right click on the client's name, then select Add Feedback Resource from the context menu that appears. Enter the Feedback Source Name and select a source type as appropriate, then click the Create Feedback Source button to complete the task.



The Feedback Resource is then created and you can now choose to either have the client score the ORS as him/herself or as the feedback resource (or both) when you right click on the client's name and select Client Tools from the context menu that appears.



Transfer Client

This option is not available at the Provider Level. However, at the Administrator or Supervisor level, it permits a user to move a client from one clinician to another. This is especially useful if a clinician is leaving an agency and all of his/her clients are being transferred to other clinical staff.

Deactivate Client

This option allows you to deactivate an active client. This should be done when the client is being discharged from CareNet. While MyOutcomes will turn a client from Active to Inactive automatically (if there is no activity in the client's record for 90 days), it is always a good idea to deactivate a client once treatment has concluded.

De-Activate Client

*Required

Warning: You are about to deactivate the client: **Test, Client 1.1 A**

Reason For Deactivation: *

Did Client Reach/Exceed Predicted Score? * Yes No

Was a follow-up call made? Yes No

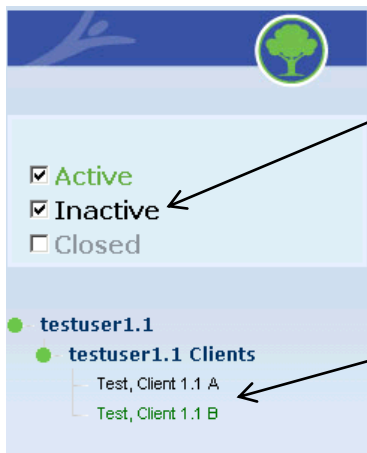
Was the client referred? Yes No

Referral Service:

Deactivation Date :*

Deactivation Notes:

Complete the deactivation screen and click the Finish button to submit. Once you deactivate a client, the clients name in the Directory Tree turns from green to black. NOTE: If you do not have a check in the Inactive option above the Directory Tree, you will not be able to see inactive clients.



Be sure the **Inactive** option is checked in order to see clients that have been deactivated. You can toggle this as necessary to expand or limit the number of clients you see in the Directory Tree.

Deactivated clients appear in black text while Active clients appear in Green Text.

Deactivated clients can be reactivated simply by right clicking on them to bring up the context menu and selecting Reactivate Client. In this screen, select the appropriate reactivation reason and date, then click Finish.

Re-Activate Client

*Required

Warning: You are about to reactivate the client: **Test, Client 1.1 A**

Reason for Reactivation: *

Reactivation Date : *

Delete Client

Clients should never be deleted from MyOutcomes unless one of a select few reasons warrant such. Deleting a client will remove all associated aggregate statistics and historical data for that client from MyOutcomes. Unless you mistakenly added the client, there should be no reason to delete the client.

Should you need to delete a client from MyOutcomes, select the Delete Client from the context menu that appears when you right-click on the client's name in the Directory Tree. You will be asked to confirm deletion of the client. NOTE: This cannot be undone.

Client to be deleted:
Test, Client 1.1 A

Would you like us to delete this Client, its aggregate statistics and accompanying historical data from the database?

Yes No

Administrator and Supervisor Level Client-Based Functions

Administrators have full access to all clients within MyOutcomes for a specific agency. As such, any of the Provider level client-based functions identified above can be completed by an administrator, regardless of the clinician or supervisor with whom the client is associated.

Supervisor level client Based Functions

Supervisors have full access to all clients associated with clinicians (Providers, as MyOutcomes calls them.) under that supervisor. As such, any of the provider level client-based functions identified previously can be completed by a Supervisor as long as the Supervisor has access to that client in MyOutcomes.