INSTRUCTIONS TO CREATE A MASTER SPREADSHEET USING PSYCKES

Create a Master Spreadsheet (you only need to do this one time and update monthly):

- Display Agency QI Overview Screen
- Filter:
  - Click Modify Filter. A new screen with filters will open
  - In the "Program Type" drop down list select "Clinic MH - ALL"
  - Click "Submit"
- Click project under "Indicator Type" (e.g., BH Care Coordination, Health Promotion and Coordination)
- Click "Summary" (located on the last line of the table). A new screen will open displaying an unduplicated list of recipients with a quality flag
- Click "Excel" icon to export PSYCKES data to an Excel spreadsheet (Choose "Export into single workbook," select "Unduplicated Recipients" from drop-down menu, click "Export")

Modify and customize spreadsheet:

- Adjust column width
- Hide unwanted rows and columns (tip: keep exported columns in place, so in the future when you update the spreadsheet, you can easily paste new information exported from PSYCKES into that format).
- Add new columns to accommodate new information:
  - For each indicator of interest, add a column (e.g., add the indicators associated with your CQI project such as 4+ Inpatient/ER, 3+ Inpatient, 3+ ER, Readmit 45, Adher-AP, Adher-MS, D/C-AD<12wks)
  - Add more columns (e.g., clinic name, therapist name, date identified, date reviewed, intervention, date intervention started, date intervention completed, outcome, date no longer positive for an intervention, notes). In the columns, type in any information that you know at this point in time.
    Optional: If you identified other recipients using sources other than PSYCKES, (e.g., screening, chart review), add new lines and type client's name and all relevant information.

Identify clients served by a clinic:

- For single clinic agencies:
  - Since all of the clients on the list are served by your agency, skip to the "Identify Quality Flags Section" below.
- For multi-clinic agencies:
  - If a recipient is served by your clinic, type in your clinic's name in the "Clinic Name" column you created. After you identified all the clients served by your clinic, sort on the "Clinic Name" column to group together all the clients for your clinic. Delete all the recipient names that do not belong to your clinic.
  - If you are identifying clients for more than one clinic in your agency, type the relevant clinic name in the "Clinic Name" column for each recipient. After you identified all the clients served by each clinic, sort on the "Clinic Name" to group together all the clients for each clinic.

Identify Quality Flags:

- Analyze all the flags in the “Quality Flags” column. Type a number ‘1’ in each of the individual indicator columns that you created for all of the indicators that apply.

Get Totals (if applicable):

- After you typed a ‘1’ in all individual indicator columns:
  - For each clinic, count how many ‘1s’ there are in each indicator to obtain the total (per clinic) for each indicator
  - For each clinic, count how many clients were flagged for each indicator in an indicator set to get an unduplicated count of clients who met criteria for that indictor set (that is, the summary for the indicator set)

Distribute Master List to All Relevant Staff (following clinics’ guidelines to secure protected health information)

Update Spreadsheet:

- Update the spreadsheet monthly with recipient data from the “New QI Flag” tab in PSYCKES.
- Update spreadsheet periodically as you receive new status information from clinical staff.