



# Completing Monthly Team Reports

Due monthly Mar 2018-Apr 2019



# Reporting Summary Data

Action & Improvement Teams are expected to complete a Monthly Team Report at the end of each month.

The Monthly Team Report contains:

- Changes tested
- What was learned
- Challenges / Successes
- Questions to your Improvement Advisor
- Team Self-Assessment
- **Outcome Data from Data Collection Tool**
  - **This quick guide will cover how to insert aggregate outcome data from the Data Collection Tool**

# Required Files

Two files are needed to complete the Monthly Team Report:

- Clear Monthly Team Report Template (Word doc)
  - This is where the report information goes
- Clear Data Collection Tool (Excel file)
  - This is where aggregate outcome data comes from

Disclaimer:

- The Clear team only requires data from the **Summary** tab which is aggregated and anonymous. We do not ask for resident-level data. We recommend not sending your *Clear Data Collection Tool* Excel file to your Improvement Advisor.
- Data collected and stored in this template should be safeguarded (similarly to any health or medical record). It contains personal, resident-level information and **should only be shared with those involved in the delivery of care.**

# Copying From Data Collection Tool

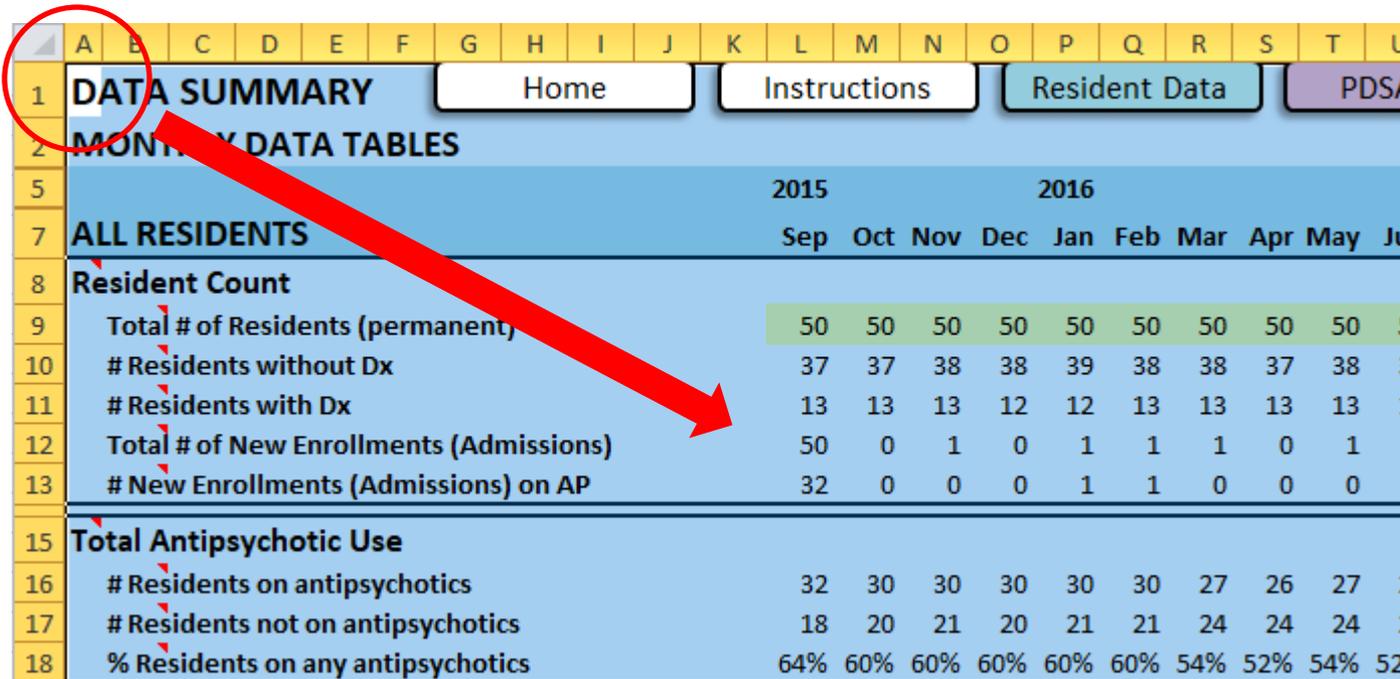
Aggregate outcome data comes from the **Summary** tab of the Data Collection Tool. The tab contains data tables like below:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH	AI	AJ
1	<b>DATA SUMMARY</b>		Home		Instructions		Resident Data		PDSA Data		Summary		Reduction Form		S	H	P	F																		
2	<b>MONTHLY DATA TABLES</b>																																			
5	2015								2016								2017																			
7	<b>ALL RESIDENTS</b>		Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug										
8	<b>Resident Count</b>																																			
9	Total # of Residents (permanent)		50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50
10	# Residents without Dx		37	37	38	38	39	38	38	37	38	37	37	37	37	39	37	38	38	39	38	38	38	38	38	38	38	38	38	38	38	38	38	38	38	38
11	# Residents with Dx		13	13	13	12	12	13	13	13	13	13	14	13	13	13	13	13	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12
12	Total # of New Enrollments (Admissions)		50	0	1	0	1	1	1	0	1	0	0	1	0	2	0	1	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	# New Enrollments (Admissions) on AP		32	0	0	0	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	<b>Total Antipsychotic Use</b>																																			
16	# Residents on antipsychotics		32	30	30	30	30	30	27	26	27	26	26	26	25	26	26	26	24	23	23	23	22	22	22	22	22	22	22	22	22	22	22	22	22	22
17	# Residents not on antipsychotics		18	20	21	20	21	21	24	24	24	24	24	25	25	26	24	25	26	28	27	27	28	28	28	28	28	28	28	28	28	28	28	28	28	28
18	% Residents on any antipsychotics		64%	60%	60%	60%	60%	60%	54%	52%	54%	52%	52%	52%	50%	52%	52%	52%	48%	46%	46%	46%	44%	44%	44%	44%	44%	44%	44%	44%	44%	44%	44%	44%	44%	44%
21	<b>Antipsychotic Use without Diagnosis of Psychosis</b>																																			
22	# Residents on AP without Dx		10	17	17	10	10	17	14	10	14	10	10	10	10	10	10	10	11	11	11	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10

There are two ways to copy the data tables and insert them into the Monthly Team Report (shown next).

# Method 1: Copy from Excel

- **COPY FROM EXCEL:** Highlight (click and hold the mouse button) the top-left cell (A1) and drag down to the bottom right-cell (AI32).



The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
1	<b>DATA SUMMARY</b>							Home		Instructions						Resident Data					PDSA
2	<b>MONTHLY DATA TABLES</b>																				
5												2015									2016
7	<b>ALL RESIDENTS</b>											Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
8	<b>Resident Count</b>																				
9	Total # of Residents (permanent)											50	50	50	50	50	50	50	50	50	50
10	# Residents without Dx											37	37	38	38	39	38	38	37	38	38
11	# Residents with Dx											13	13	13	12	12	13	13	13	13	13
12	Total # of New Enrollments (Admissions)											50	0	1	0	1	1	1	0	1	1
13	# New Enrollments (Admissions) on AP											32	0	0	0	1	1	0	0	0	0
15	<b>Total Antipsychotic Use</b>																				
16	# Residents on antipsychotics											32	30	30	30	30	30	27	26	27	27
17	# Residents not on antipsychotics											18	20	21	20	21	21	24	24	24	24
18	% Residents on any antipsychotics											64%	60%	60%	60%	60%	60%	54%	52%	54%	52%

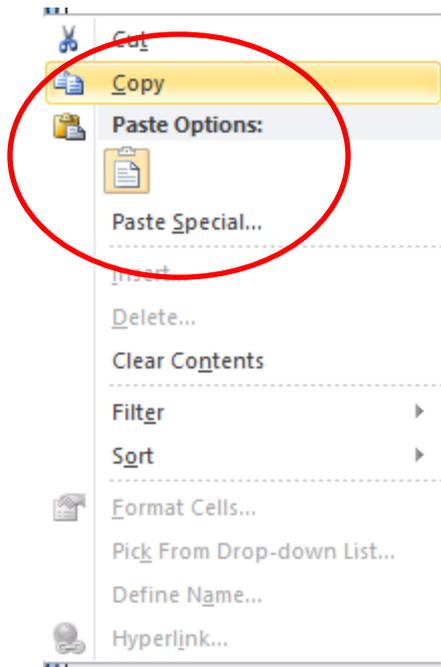
# Method 1: Copy from Excel

- Continuation from previous page: this is the bottom right cell of the table where you should stop highlighting.

30	30	30	27	26	27	26	26	26	25	26	26	26	24	23	23	23	22	22	22	22
20	21	21	24	24	24	24	24	25	25	26	24	25	26	28	27	27	28	28	28	28
0%	60%	60%	54%	52%	54%	52%	52%	52%	50%	52%	52%	52%	48%	46%	46%	46%	44%	44%	44%	44%
18	18	17	14	13	14	13	13	12	12	13	13	13	12	11	11	11	10	10	10	10
17	18	17	14	13	14	13	13	12	12	13	13	13	12	11	11	11	10	10	10	10
7	6	4	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
7%	46%	45%	37%	35%	37%	35%	35%	32%	32%	33%	35%	34%	32%	28%	28%	29%	26%	26%	26%	26%
5%	46%	45%	37%	35%	37%	35%	35%	32%	32%	33%	35%	34%	32%	28%	29%	29%	26%	26%	26%	26%
3%	15%	11%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%
3	3	2	3	0	0	3	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	3	2	0	0	0	0	1	1	0	0	0	0	0	0	0	0	0	0	0	0

# Method 1: Copy from Excel

- Right-click on the mouse and choose “Copy”. Then “Paste” into the Monthly Team Report. This inserts the data tables.
- Alternatively, you can Copy (Ctrl+C) and Paste (Ctrl+V).
- Do this too for “**COHORT LEVEL ANALYSIS**” (range A58 to AB69).



OR



# Method 1: Copy from Excel

- The tables should be pasted into the Monthly Team Report.
- Note the formatting might be off (this is okay as long as the data is there!)

**Monthly Data**

Paste in this section the tables from the *Summary* tab in the *Clear Data Collection Tool*.

**DATA SUMMARY**

**MONTHLY DATA TABLES**

	2015				2016				2017																	
	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug		
<b>ALL RESIDENTS</b>																										
<b>Resident Count</b>																										
Total # of Residents (permanent)	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50
# Residents without Dx	37	37	38	38	39	38	38	37	38	37	37	37	37	39	37	38	38	39	38	38	38	38	38	38	38	38
# Residents with Dx	13	13	13	12	12	13	13	13	13	13	13	14	13	13	13	13	13	12	12	12	12	12	12	12	12	12
Total # of New Enrollments (Admissions)	50	0	1	0	1	1	1	1	1	0	1	0	1	0	2	0	1	0	1	0	0	0	0	0	0	0
# New Enrollments (Admissions) on AP	32	0	0	0	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total Antipsychotic Use</b>																										
# Residents on antipsychotics	32	30	30	30	30	30	27	26	27	26	26	26	25	26	26	26	24	23	23	23	22	22	22	22	22	22
# Residents not on antipsychotics	18	20	21	20	21	21	24	24	24	24	24	25	25	26	24	25	26	28	27	27	28	28	28	28	28	28
% Residents on any antipsychotics	64	60	60	60	60	60	54	52	54	52	52	52	52	52	48	46	46	46	46	44	44	44	44	44	44	
<b>Antipsychotic Use without Diagnosis of Psychosis</b>																										
# Residents on AP without a Dx	19	17	17	18	18	17	14	13	14	13	13	12	12	13	13	13	12	11	11	11	10	10	10	10	10	10
# Residents on scheduled AP without a Dx	18	16	16	17	18	17	14	13	14	13	13	12	12	13	13	13	12	11	11	11	10	10	10	10	10	10
# Residents on PRN AP without a Dx	9	9	8	7	6	4	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
% Residents on AP without Dx	51	46	45	47	46	45	37	35	37	35	35	32	32	33	35	34	32	28	29	29	26	26	26	26	26	26
% Residents on scheduled AP without Dx	49	43	42	45	46	45	37	35	37	35	35	32	32	33	35	34	32	28	29	29	26	26	26	26	26	26
% Residents on PRN AP without Dx	24	24	21	18	15	11																				

**Process Measures**

# Method 2: Print Screen

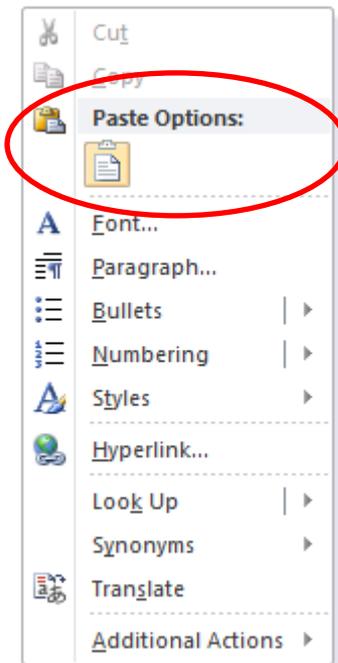
- **PRINTSCREEN (screenshot):** press Print Screen (next to F12 on the keyboard). Note you must have the Excel file on display to take a screenshot of the data.
- Note: This might not work if the computer has special software (i.e. Snagit) that could interfere with taking screenshots.



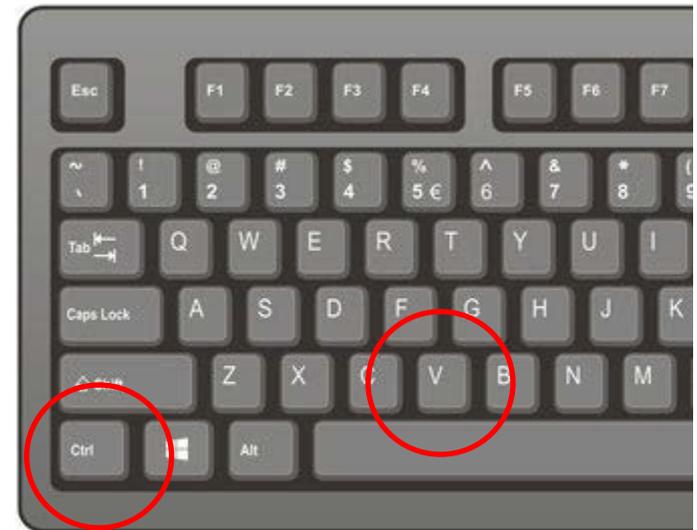
ComputerHope.com

# Method 2: Print Screen

- Right-click on the mouse and choose “Paste” into the Monthly Team Report.
- Alternatively, you can Paste by pressing Ctrl+V at the same time.



OR



# Method 2: Print Screen

- The image should be pasted into the Monthly Team Report.
- Make sure to also paste in the “**COHORT LEVEL ANALYSIS**” section located further down in the *Summary* tab.
- Note, please paste screenshot at the end of the Monthly Report Word doc where it says “Monthly Data”.

Clear Monthly Team Report Template.docx - Microsoft Word

File Home Insert Page Layout References Mailings Review View Developer Acrobat

Calibri 11 A A Aa AaBbCcDc AaBbCc AaBbCc AaBbCc AaB AaBbCc AaBbCcDc AaBbCcD

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**Monthly Data**

Paste in this section the tables from the Summary tab in the Clear Data Collection Tool.

DATA SUMMARY Home Instructions Resident Data PDSA Data Summary Reduction Form S H P I

MONTHLY DATA TABLES

ALL RESIDENTS	2015				2016				2017															
	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
<b>Resident Count</b>																								
Total # of Residents (permanent)	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50
# Residents without Dx	37	37	38	38	39	38	38	37	38	37	37	37	37	39	37	38	38	39	38	38	38	38	38	38
# Residents with Dx	13	13	12	12	13	13	13	13	13	13	14	13	13	13	12	12	12	12	12	12	12	12	12	12
Total # of New Enrollments (Admissions)	50	0	1	0	1	1	1	0	1	0	0	1	0	2	0	1	0	1	0	0	0	0	0	0
# New Enrollments (Admissions) on AP	32	0	0	0	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total Antipsychotic Use</b>																								
# Residents on antipsychotics	32	30	30	30	30	30	27	26	27	26	26	26	25	26	26	26	24	23	23	23	22	22	22	22
# Residents not on antipsychotics	18	20	21	20	21	21	24	24	24	24	24	24	25	25	26	24	25	26	28	27	27	28	28	28
% Residents on any antipsychotics	64%	60%	60%	60%	60%	60%	54%	52%	54%	52%	52%	52%	50%	52%	52%	52%	48%	46%	46%	46%	44%	44%	44%	50%

# Team Self-Assessment

Before sending in data, please also provide a score for your Team Self-Assessment. This score helps identify progress and will help you and your Improvement Advisor work together to support the improvement work. Below is the scale for reference:

<b>1.0</b>	Team formed and aim determined.
<b>1.5</b>	Planning, meeting, and discussion occurring.
<b>2.0</b>	Activity has begun, but no changes tested yet. Team developing change ideas and measures. Baseline measurement has begun.
<b>2.5</b>	Testing has begun, but no evidence of improvement yet. Key measures identified and data collection has begun.
<b>3.0</b>	Several test cycles completed. Evidence of improvement seen in at least one process measure.
<b>3.5</b>	Process measures continue to improve; evidence of improvement in at least one outcome measure. PDSA tests on various change ideas. Team can talk to their learnings and plan for changes.
<b>4.0</b>	Changes implemented; evidence of improvement in outcome and process measures.
<b>4.5</b>	Evidence of sustained improvement in outcome measures. Plans for spreading the improvement are in place (if applicable).
<b>5.0</b>	Antipsychotic use without a diagnosis of psychosis consistently below national average (21.8%). Plans in place for continuous monitoring.

# Data Submission

- Submit the *Monthly Team Report* to the Clear Team ([clearbc@bcpsqc.ca](mailto:clearbc@bcpsqc.ca)) at the beginning of each month. Data collected for the month should be submitted on the second Friday of the following month.
  - For example, data for February should be submitted on the second Friday of March. Please email the file to your Improvement Advisors.
- Remember to save your files (both *Data Collection Tool* and *Monthly Team Report*). Don't forget to include the current month in the title of your *Monthly Team Report*.

# Help Always Available

If you have any questions or require help with reporting, please don't hesitate to reach out to us at [clearbc@bcpsqc.ca](mailto:clearbc@bcpsqc.ca). We will gladly schedule a call to walk through it with you!

Thank You!