New York State Office of Mental Health

PSYCKES

Center for Practice Innovations℠
at Columbia Psychiatry
New York State Psychiatric Institute
Building best practices with you.

Office of Mental Health (OMH) Continuous Quality Improvement Initiative for Health Promotion and Care Coordination

Creating and Maintaining a Master Spreadsheet Using PSYCKES

We will begin shortly

August 2013

Overview

- Welcome
- Purpose of a Master Spreadsheet
- Demonstration
  - Create, modify, update a master spreadsheet
- Questions

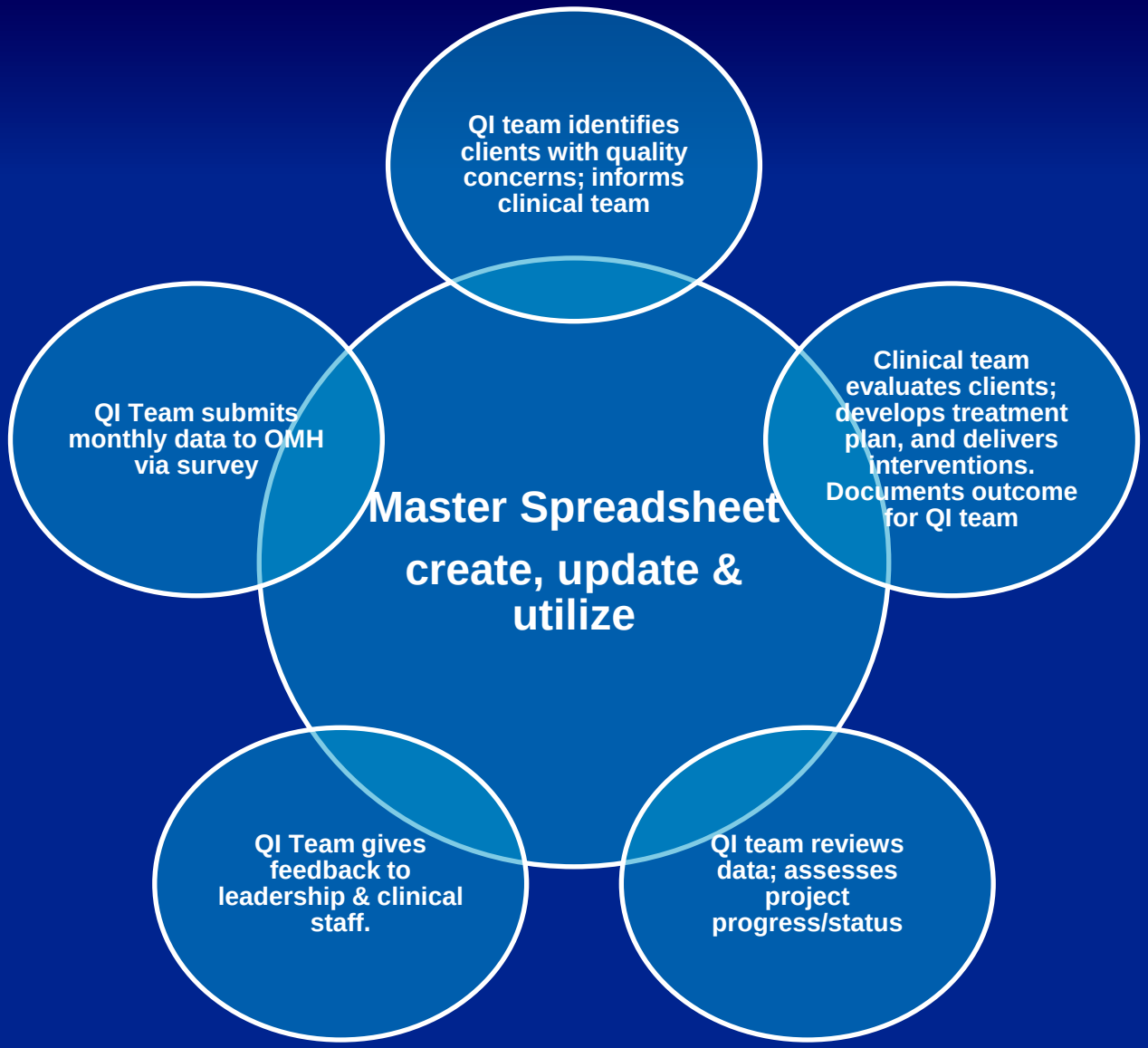
Master Spreadsheet

- Lists clients identified as having a quality concern
- Share with clinical staff to ensure that they are aware of any quality concerns to be addressed during a client's appointment
- Track client status
- Provides data about progress towards project goals

Master Spreadsheet

- Use PSYCKES and other sources to create a master spreadsheet of clients with a quality flag
- Update spreadsheet to track
  - Client risk factors
  - Interventions delivered to clients
  - New clients
- Data sources for creating/updating spreadsheet include e.g. PSYCKES, client self-report, EMR, clinical case reviews, information from other providers

Data Management Flow



Create Spreadsheet

- Using PSYCKES, export the list of unduplicated recipients for the summary indicator into Excel (do this once)

- See PSYCKES website
  - Sample Master Spreadsheet
  - Detailed Instructions

Sample Master Spreadsheet:

Project Tools → Master Tracking Spreadsheet

New York State | State Agencies | Search all of NY.gov

Office of Mental Health
Acting Commissioner Kristin M. Woodlock, RN, MPA Governor Andrew M. Cuomo

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PSYCKES MEDICAID

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Freestanding Mental Health Clinics

Project Tools | Clinical Tools | Using PSYCKES | Past Initiative | Center for Practice Innovations

Master Tracking Spreadsheet

Clinic QI teams are expected to maintain a list of clients that have been identified as having a quality concern to provide actionable data that support CQI activities. This list of positive cases can be shared with clinical staff to ensure that they are aware of any quality concerns to be addressed during a client's appointment; used as a tool to track client status; and provide the QI team with data about progress towards project goals. The master list should be updated regularly.

OMH recommends the following strategy for identifying and tracking positive cases:

- Initially, the QI team logs into PSYCKES and exports the list of unduplicated recipients for the summary indicator into Excel, making any corrections necessary. This forms the basis for a running, comprehensive list of positive cases identified for the project.
- The team adds columns for additional information of interest (e.g. clinic name, indicators, therapist name, date identified, date evaluated, intervention, and outcome of clinical evaluation).
- If the clinic is using additional methods to identify positive cases, these names are added to the list.
- The list is sorted by clinic and/or clinician and distributed to appropriate staff.
- Each month thereafter, the QI team checks the "New QI Flag" and "Dropped QI Flag" tabs in PSYCKES. After verifying the data in clinic records, the team updates the list to incorporate any changes in positive case status.

A sample spreadsheet developed by using this technique and more detailed instructions (45kb) can help you design a master tracking spreadsheet.

Comments or questions about the information on this page can be directed to the PSYCKES Team.

Sample Master Spreadsheet

Quality Indicator Overview As Of 2/01/2012

Agency: My Clinic Name

Attending:ALL, Program Type:MHClinic - Free Standing,Age:ALL

Behavioral Health Care Coordination Project

Recipient	Medicaid ID	DOB	Quality Flags	Medications (BH; excludes enhanced PHI)	Most Recent BH Outpatient Attending	3+ Inpatient - BH	3+ ER-BH	4+ Inpt/ER-BH	Readmit-All BH 45d	Adher - AP (Szch)	Adher-MS (Bipo)	D/C-AD <12wks	Clinic Name	Therapist Name	Date Identified	Date evaluated	Intervention
xxxxxxx	xxxxxxxx	xx/xx/xxxx	3+ Inpatient - BH, 4PP(A), DM, Obes, Readmit-All BH 30d, Readmit-All BH 45d, Readmit-All BH 7d, Readmit-Hosp BH 15d, Readmit-Hosp BH 30d, Readmit-Hosp BH 45d	CLONAZEPAM, LITHIUM CARBONATE, OLANZAPINE, TRAZODONE HCL	xxxxx	1	1		1				Main Street	xxxx	2/15/13	3/19/13	CBT, MI, refer t health home
xxxxxxx	xxxxxxxx	xx/xx/xxxx	Adher-MS	ARIPIPRAZOLE, DULOXETINE HCL, GABAPENTIN	xxxxx						1		Main Street	xxxx	2/15/13	3/1/13	CBT. pill boxes, reminders,
xxxxxxx	xxxxxxxx	xx/xx/xxxx	3+ ER-BH, 4+ Inpt/ER-All, 4+ Inpt/ER-BH	CLONAZEPAM, SERTRALINE HCL	xxxxx		1	1					Westside	xxxx	2/15/13	3/27/13	CBT, MI, refer t social support services
xxxxxxx	xxxxxxxx	xx/xx/xxxx	CVD, D/C-AD <12wks, HL, HTN, No DM Screen-AP	CITALOPRAM HYDROBROMIDE, OLANZAPINE	xxxxx							1	Main Street	xxxx	2/15/13	2/29/13	behavioral tailo teach back
xxxxxxx	xxxxxxxx	xx/xx/xxxx	D/C-AD <12wks, No HbA1c-DM	CITALOPRAM HYDROBROMIDE	xxxxx							1	Westside	xxxx	2/15/13	3/6/13	behavioral tailo teach back, fam involvement
xxxxxxx	xxxxxxxx	xx/xx/xxxx	Adher-MS	OLANZAPINE	xxxxx						1		Main Street	xxxx	2/15/13	3/25/13	behavioral tailo teach back

Detailed Instructions

INSTRUCTIONS TO CREATE A MASTER SPREADSHEET USING PSYCKES

1) Create a Master Spreadsheet (you only need to do this one time and update monthly):
   - Display Quality Indicator Overview screen ("My QI Report" tab)
   - Click Modify Filter.
   - Change Program Type filter and then click "Submit":
     - Article 31 mental health clinics and Diagnostic and Treatment Centers: filter for MHClinic – Free standing.
     - State operated clinics: filter for MH Clinic/PMHP – State Operated
   - Click your project indicator under "Indicator Set" (e.g., BH Care Coordination, Health Promotion and Coordination).
   - Click "Summary" (located on the last line of the table). A new report will open displaying an unduplicated list of recipients with a quality flag.
   - Click "Excel" icon on the upper right side of the screen to export PSYCKES data to an Excel spreadsheet (Select "Unduplicated Recipients" from drop-down menu, click "Export").
   - Save the Excel spreadsheet to your computer (follow your institution's protocols for saving protected health information)

2) 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 the same format).
   - Add new columns to the right of existing columns to accommodate new information:
     - For each indicator, add a new 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 evaluated, intervention, date intervention started, date intervention completed, outcome, date no longer positive for a quality concern, 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 the client's name and all relevant information.

My QI Report
Quality Indicator Overview

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New York State Office of Mental Health

Log Off

My QI Report | Statewide Reports | Recipient Search | Provider Search | MyPSYCKES | Registrar Menu | Usage Report

De-Identify Data

Click "Modify Filter"

Quality Indicator Overview As Of 05/01/2013

Provider: Main Street Health Center

Provider Details | Find Provider

Export PDF Excel

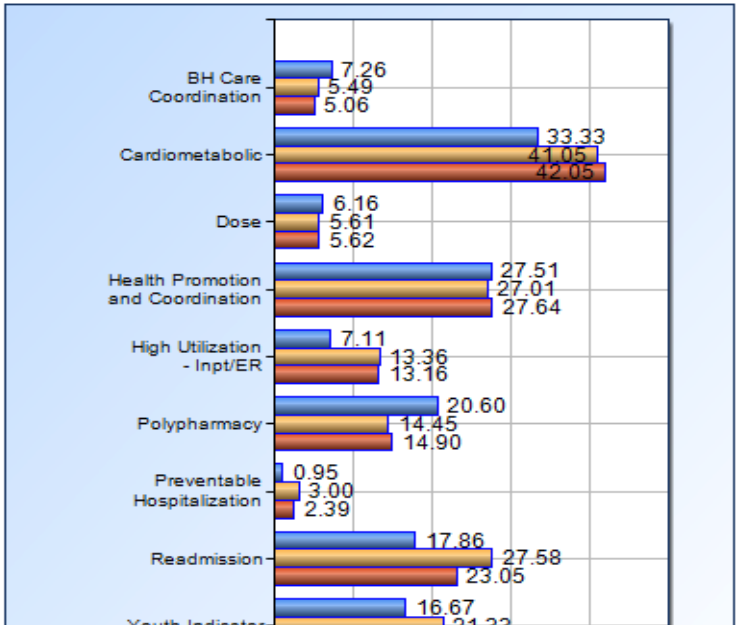
Modify Filter | Site:ALL, Attending:ALL, Program Type:ALL, Age:ALL, Population:ALL

Indicator Set:BH Care Coordination Select indicator for detail.

Report View Type: Report Only | Graph Only | Both

Indicator Set | Indicator

Indicator Set	Population	On Any	N	%	Regional %	Statewide %
BH Care Coordination	All	647	47	7.26	5.49	5.06
Cardiometabolic	All	87	29	33.33	41.05	42.05
Dose	All	276	17	6.16	5.61	5.62
Health Promotion and Coordination	All	647	178	27.51	27.01	27.64
High Need - Ineffectively Engaged	All		2			
High Utilization - Inpt/ER	All	647	46	7.11	13.36	13.16
Polypharmacy	All	199	41	20.60	14.45	14.90
Preventable Hospitalization	Adult	526	5	0.95	3.00	2.39
Readmission	All	56	10	17.86	27.58	23.05
Youth Indicator	Child	36	6	16.67	21.33	24.08



Filter by Program Type

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De-Identify Data

Change Program Type
MHClinic Free Standing
or
MH Clinic/PMHP - State Operated
Click Submit

Quality Indicator Overview As Of 05/01/2013

Provider: Main Street Health Center

Provider Details | Find Provider

Export PDF Excel

Sites: ALL

Program Type:
- ALL
- Adult Community Residence (CR_ADULT)
- Community Residence (CR)
- MH Clinic (CLINIC)
- MHClinic - Free Standing
- OASAS Outpatient Services
- Personalized Recovery Oriented Services (PROS)

ing: ALL

Age:
- ALL
- (0-17)
- Adult (+18)

Population ALL

Submit | Reset | Cancel

Release: 4.8.3

Report Filtered by "Program Type"

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De-Identify Data

Quality Indicator Overview As Of 05/01/2013

Provider Details | Find Provider

Provider: Main Street Health Center

Export PDF Excel

Modify Filter

Site:ALL, Attending:ALL, Program Type:MHClinic - Free Standing, Age:ALL, Population:ALL

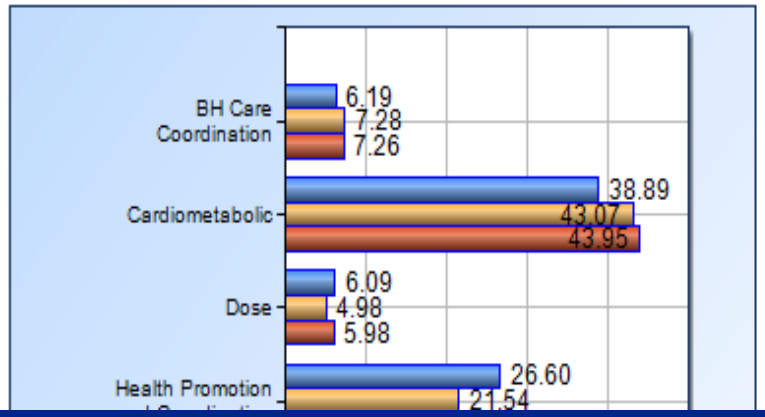
Select Indicator Set for Details

Click the indicator for your clinic's project

Report View Type: Report Only | Graph Only | Bot

Indicator Set

Indicator Set	Population	On Any	N	%	Regional %	Statewide %
BH Care Coordination	All	485	30	6.19	7.28	7.26
Cardiometabolic	All	54	21	38.89	43.07	43.95
Dose	All	197	12	6.09	4.98	5.98
Health Promotion and Coordination	All	485	129	26.60	21.54	24.02



Behavioral Health Care Coordination Indicator Set

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De-Identify Data

Quality Indicator Overview As Of 05/01/2013

Provider: Main Street Health Center

Provider Details | Find Provider

Export PDF Excel

Modify Filter | Site:ALL, Attending:ALL, Program Type:MHClinic - Free Standing, Age:ALL, Population:ALL

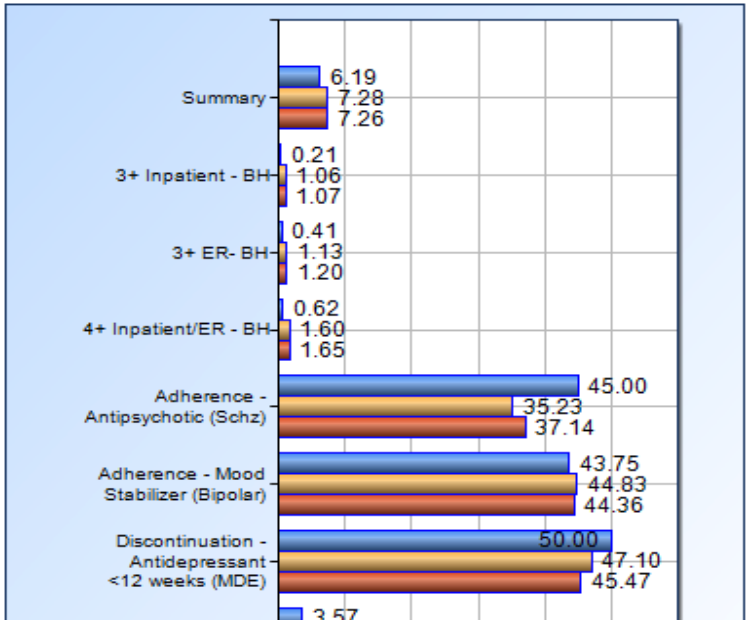
Indicator Set:BH Care Coordination | Select indicator for detail.

Report View Type: Report Only | Graph Only | Both

Indicator Set | Indicator

Indicator	Population	On Any	N	%	Regional %	Statewide %
3+ Inpatient - BH	All	485	1	0.21	1.06	1.07
3+ ER- BH	All	485	2	0.41	1.13	1.20
4+ Inpatient/ER - BH	All	485	3	0.62	1.60	1.65
Adherence - Antipsychotic (Schz)	(0-64) yrs	40	18	45.00	35.23	37.14
Adherence - Mood Stabilizer (Bipolar)	(0-64) yrs	16	7	43.75	44.83	44.36
Discontinuation - Antidepressant < weeks (MDE)		8	4	50.00	47.10	45.47
Readmission - A day	All	28	1	3.57	21.01	19.21
Summary	All	485	30	6.19	7.28	7.26

Click Summary



Unduplicated Recipients Report

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Log Off

My QI Report | Statewide Reports | Recipient Search | Provider Search | MyPSYCKES | Registrar Menu | Usage Report

De-Identify Data

Quality Indicator Overview As Of 05/01/2013

Provider Details | Find Provider

Provider: Main Street Health Center

Export PDF Excel

Modify Filter **Site:**ALL, **Attending:**ALL, **Program Type:**MHClinic - Free Standing, **Age:**ALL, **Population:**ALL

Indicator Set:BH Care Coordination, **Indicator:**Summary

Indicator Set | Indicator | Site | Unduplicated Attending | **Unduplicated Recipients** | New QI Flag | Dropped QI Flag

Recipient	Medicaid ID	DOB	Quality Flags	Medications (BH; excludes enhanced PHI)	Most Recent BH Outpatient Attending
Abccabj Fccacbg	Bcgeedj Fgcdjca	12/31/9999	Adher-AP		Name
Afabcda Daeeeaa	Afabcdf Fadeddg	12/31/9999	Adher-MS, No DM Screen-AP	DULOXETINE HCL, QUETIAPINE FUMARATE	Name
Ahajbdg Decacga	Biabdbg Debedad	12/31/9999	Adher-AP, No DM Screen-AP	BENZTROPINE MESYLATE, DIVALPROEX SODIUM, HALOPERIDOL	Name
Ajbbdba Gecdeef	Fbabdff Fdcejhd	12/31/9999	Adher-AP, No DM Screen-AP, No Outpt Med	HALOPERIDOL DECANOATE	Name
Bbcefhg Hjajbda	Hejbeci Djadbgi	12/31/9999	3+ ER-BH, 4+ Inpt/ER-All, 4+ Inpt/ER-BH		None Identified
Bccfjfe Gbfehef	Dbddhha Heabcac	12/31/9999	Adher-AP	BENZTROPINE MESYLATE, FLUPHENAZINE DECANOATE	None Identified

Unduplicated Recipients Report Export Option

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Log Off

New York State Office of Mental Health

My QI Report | Statewide Reports | Recipient Search | Provider Search | MyPSYCKES | Registrar Menu | Usage Report

De-Identify Data

Quality Indicator Overview As Of 05/01/2013

Provider: Main Street Health Center

Provider Details | Find Provider

Export PDF Excel

Modify Filter **Site:**ALL, **Attending:**ALL, **Program Type:**MHClinic - Free Standing, **Age:**ALL, **Population:**ALL

Indicator Set:BH Care Coordination, **Indicator:**Summary

Indicator Set | Indicator | Site | Unduplicated Attending | **Unduplicated Recipients** | New QI Flag | Dropped

Recipient	Medicaid ID	DOB	Quality Flags	Medications (BH; excludes enl	
Abccabj Fccacbg	Bcgeedj Fgcdjca	12/31/9999	Adher-AP		
Afabcda Daeeeaa	Afabcdf Fadeddg	12/31/9999	Adher-MS, No DM Screen-AP	DULOXETINE HCL, QUETIAPINE	
Ahajbdg Decacga	Biabdbg Debedad	12/31/9999	Adher-AP, No DM Screen-AP	BENZTROPINE MESYLATE, DIVAL SODIUM, HALOPERIDOL	
Ajbbdba Gecdeef	Fbabdff Fdcejhd	12/31/9999	Adher-AP, No DM Screen-AP, No Outpt Med	HALOPERIDOL DECANOATE	
Bbcefhg Hjajbda	Hejbeci Djadbgi	12/31/9999	3+ ER-BH, 4+ Inpt/ER-All, 4+ Inpt/ER-BH		None Identified
Bccfjfe Gbfehef	Dbddhha Heabcac	12/31/9999	Adher-AP	BENZTROPINE MESYLATE, FLUPHENAZINE DECANOATE	None Identified

Export Option

Excel Option

- (•) Export into separate worksheets.
- ( ) Export into single workbook.

Sections — Select All ☐

- Site
- Unduplicated Attending
- Unduplicated Recipients
- New QI Flag

*Use ctrl key to select/unselect multiple items.

Export | Cancel

Data exported to Excel Spreadsheet

A3 | Provider: MAIN STREET HEALTH CENTER Site:ALL, Population:ALL

	A	B	C	D	E	F	G	H	I	J
1	**Quality Indicator Overview As Of 05/01/2013**									
2										
3	Provider: MAIN STREET HEALTH CENTER Site:ALL, Population:ALL									
4	Attending:ALL, Program Type:MHClinic - Free Standing,Age:ALL, Population:ALL, Indicator Set:BH									
5	**Unduplicated Recipients**									
6	**Recipient**	**edicaid ID**	**DOB**	**ality Flags**	**nced PHI)**	**Attending**				
7	Abccabj F	Bcgeedj F	########	Adher-AP		NAME				
8	Afabcda D	Afabcdf Fa	########	Adher-MS,	DULOXETI	NAME				
9	Ahajbdg D	Biabdbg D	########	Adher-AP,	BENZTRO	NAME				
10	Ajbbdba G	Fbabdff Fd	########	Adher-AP,	HALOPER	NAME				
11	Bbcefhg H	Hejbeci Dj	########	3+ ER-BH,	4+ Inpt/EF	None Identified				
12	Bccfjfe Gb	Dbddhha H	########	Adher-AP	BENZTRO	None Identified				
13	Bdeddba C	Bfefjcg Ffe	########	D/C-AD <1	BENZTRO	NAME				
14	Bfbbfac Fb	Djfdeej Afa	########	Adher-AP,	HALOPER	NAME				
15	Bfbcafg Ca	Gfaeedb Jl	########	D/C-AD <1	ATENOLO	NAME				
16	Bffiach Aaj	Cffceia Cfji	########	Adher-AP,	BENZTRO	NAME				
17	Cchhcff Gc	Cacjhee A	########	Adher-AP	ARIPIPRA	NAME				
18	Dbhijfi Ibga	Efadcdf Ag	########	Adher-AP,	HALOPER	NAME				
19	Ddecfdd Fi	Efaecbg D	########	4PP(A), A	ALPRAZO	NAME				
20	Ddjecbe E	Ibicjcd Gaf	########	4+ Inpt/ER	CLONAZE	NAME				
21	Dehdcdg E	Bfabaai Cc	########	4+ Inpt/ER	ARIPIPRA	NAME				
22	Dfgdhga A	Gafefge Ac	########	Adher-AP	ARIPIPRA	None Identified				
23	Diaahab F	Dbfdhij Eb	########	D/C-AD <12wks		NAME				
24	Ebgeaff Bj	Gfdbccf Dh	########	Adher-MS	ARIPIPRA	NAME				
25	Eebfehj Cg	Eecicjh Ffg	########	D/C-AD <1	LORAZEP	NAME				
26	Ehfceai Bil	Fcecdaf Bl	########	Adher-AP	ARIPIPRA	NAME				
27	Ejhecea D	Acfhcjf Jhc	########	Adher-AP,	OLANZAP	NAME				
28	Fbabggg J	Badhdhe E	########	Adher-AP	BENZTRO	NAME				
29	Fbahcgb F	Fcbcchc J	########	Adher-MS	HALOPER	NAME				
30	Ffjeabe Eb	Fcghfif Fjh	########	2AP, Adhe	FLUPHEN	NAME				
31	Gegbifg Bc	Cdgfaea A	########	Adher-MS,	BENZTRO	NAME				
32	Gieacba D	Dbajhgc C	########	4+ Inpt/ER	FLUPHEN	NAME				

Unduplicated Recipients

Ready

Save spreadsheet to your computer

Modify Spreadsheet

- Make necessary corrections
  - e.g., adjust column width, hide unwanted rows/columns, format column headings, wrap text
- Add columns for additional information of interest
  - e.g., indicators, clinic name, therapist name, date identified, date evaluated, intervention, outcome of clinical evaluation
- Use additional methods to identify positive cases, if applicable; add these names to the list
- Delete clients discharged and not served at your clinic (or save on separate sheet for reference)
- The list is sorted by clinic and/or clinic staff and distributed to appropriate staff

Update Spreadsheet

- QI team updates the spreadsheet to incorporate any changes in positive case status
  - Date evaluated
  - Intervention; start and completion dates
  - Outcome of evaluation
  - Notes
- Each month, check the “New QI Flag” tab in PSYCKES; check other sources
- Provide updated list to clinical staff monthly

New QI Flag

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Log Off

My QI Report | Statewide Reports | Recipient Search | Provider Search | MyPSYCKES | Registrar Menu | Usage Report

De-Identify Data

Quality Indicator Overview As Of 05/01/2013

Provider Details | Find Provider

Provider: Main Street Health Center

Export PDF Excel

Modify Filter **Site:**ALL, **Attending:**ALL, **Program Type:**MHClinic - Free Standing, **Age:**ALL, **Population:**ALL

Indicator Set:BH Care Coordination, **Indicator:**Summary

Show new/dropped for last: 1 Month 3 Months

Indicator Set | Indicator | Site | Unduplicated Attending | Unduplicated Recipients | **New QI Flag** | Dropped QI Flag

Recipient	Medicaid ID	DOB	Current Quality Flags	New Quality Flags	Medications (BH; excludes enhanced PHI)	Most Recent BH Outpatient Attendir
Abccabj Fccacbq	Bcgeedj Fgcdjca	12/31/9999	Adher-AP	Adher-AP		Name
Dfqdhqa Adhjeac	Gafefge Adedebf	12/31/9999	Adher-AP	Adher-AP	ARIPIPRAZOLE	None Identified
Eebfehj Cqiffaa	Eecicjh Ffgbcae	12/31/9999	D/C-AD <12wks	D/C-AD <12wks	LORAZEPAM, PAROXETINE HCL, TRAZODONE HCL, ZOLPIDEM TARTRATE	Name
Geqbifq Bcehjbd	Cdgfaea Abiabfa	12/31/9999	Adher-MS, No DM Screen-AP	Adher-MS	BENZTROPINE MESYLATE, HALOPERIDOL	Name

Contact Information

- PSYCKES application and questions about monthly reporting
  - PSYCKES-Help:

    PSYCKES-help@omh.ny.gov

Your Questions