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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, because it has enabled MyOutcomes® to build a large database to calculate normative data, normative data that helps therapists to better predict the treatment course of each of their clients and make adjustments to their treatment plans, if needed.

Like any technology, however, computers and mobile devices with their interconnectedness have possible vulnerabilities that have the potential to expose us to the darker side. 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 them. All of these are points of concern, because they are points of vulnerability. 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 our personal information. If that weren’t sufficient, there are others, who are nothing more than vandals looking to access these systems in order to damage whatever they find.

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’s 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 on the internet. To protect the privacy of your clients, it is recommended that any device screen is situated 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.

Note: 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.com
MyOutcomes® is accessible on any computer, laptop, tablet, or smartphone that has internet access. MyOutcomes® Version 16 supports the following browsers: Internet Explorer 9, 10, 11, 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.

2.1 Log in:
To log in for the first time, look for two 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. An 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 an 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.

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 name and then select which action is desired in the drop-down menu at the bottom of the list.

2.3 MyOutcomes Home Page:
Logging into MyOutcomes® lands you on your Home Page.

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: Located on the right-hand side of the screen is the Main Content Viewing Area (MCA). 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.

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, Case Alerts, and ORS Audit. If you have signed up for FIT eLearning, the tab for opening that program will be on the right as well.
2.4 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.

2.5 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.

2.6 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 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.

2.7 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.

2.8 Drop-down Menu on the Tree Directory:
Right click on the user name 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 MCA.
2.9 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 the Customer Service Provider at http://www.myoutcomes.com/contact-myoutcomes/.

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.

2.10 User Access

Each user’s tree view will look differently 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 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.

2.11 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, e-mail addresses, setting default language for surveys, setting default to display or not display feedback messages and setting default date format. The owner can also update and add new administrators. These functions can be accessed via the drop-down menu on the tree or on their Home Page.

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 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 Console.

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 transfers all or their providers.

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 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.
3.7 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.

3.8 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.

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.

3.9 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.
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.

### 3.10 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.

### 3.11 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.

### 3.12 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.
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 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.
4.3 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.

4.4 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.
4.5 To Transfer Clients:

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.

**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.

4.6 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, transfer clients, active and inactive, first.
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.

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

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 (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.

### 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 (Update Tags)** link found at the top of the page. 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 aggregate outcome statistics to be pulled for different client populations.

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 labelled “Is this a GSRS Group?” to insure 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.
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.

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 insure a client receiving individual counselling 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 are not allowed when creating or modifying client names.

### 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 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 Adding a Feedback Source:
Feedback Sources (Collateral Raters, such as parents, probation officers, etc. can be added to a client once the client has been 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.

5.9 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), Tag(s), as well as select language, if necessary.

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 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. (See Best Practices for more.)

Note: Select display 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.
5.10  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.

5.11  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.

5.12  To Deactivate Clients and Couples:
Right click on the client or couple user name or ID on the Tree Directory and select Deactivate Client.

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.

### 5.13 Reactivation of Clients:

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

#### 5.14 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 labelled **Inactive Client Console**.
5.15 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).

5.16 Transferring Clients:

The ability to transfer clients depends on the use’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.

5.17 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.

5.18 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.

5.19 Deleting Clients:

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

Warning: Clients should not be deleted from MyOutcomes unless they were entered in error.
In addition to still 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 has limited provider functionality, instead of administering paper versions of the ORS/SRS and then manually entering the scores into the MyOutcomes 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 off-site therapeutic session.
6.1 Organization of & Navigating Through MyOutcomes® Mobile 2.0

MyOutcomes® Mobile 2.0 include 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 (see section 6.1 of this chapter for client 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 mobile app reflects the list in the web app. The provider will see the client type, Client ID/Client Group, session #/last survey date, the current survey type and a color-coded CSR icon. At the bottom page, there is a Client List (house shaped) icon that returns the provider to the client list and an icon for logging out of the app.

6.2 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 (see section 6.1 of this chapter for details). After the client submits the survey scores, an updated CSR will be generated if WiFi or a network connection are available.

6.3 Accessing Couple Members & Feedback Sources

To access individual couple members or feedback sources, click on the couple ID or the client name,

6.4 Remote Access to the ORS and SRS:

For remote access to the ORS, such as when therapy is conducted via a phone, the provider can enable the client’s access to the ORS and SRS. To give access, click the Give Access link found on the provider’s Home Page on the same row as the client’s ID under the Action column. By clicking on this link, the provider can create a user ID and password that can be given to the client or the MyOutcomes system can email to them.

Remote Access is compatible on computers, laptops, tablets, iPad/iPhone or Android using Internet Explorer 9, 10, 11 and Edge, FireFox (latest version), Google Chrome (latest), or Safari (latest).
To use Remote Access:

1. To give remote access, click on the **Give Access** link, which is found on provider Home Page in the web app. Type the client’s email address in the window that opens up. You have the option to save the email address to make future use of the Give Access function easier.

2. If you wish to email the login information to the client, click Email PCOMS button. The client will then receive two emails, one with subject line “MyOutcomes Access,” which contains the client’s user ID. The second email, with the subject line “MyOutcomes Access Part 2,” provides the client’s password.

3. A link to the MyOutcomes login page is also provided. When the link is clicked, the login page will open up on the client’s device. Using the user ID and password provided, they can login to take the ORS/SRS.
   
   **Note:** Whether the client is logging into the web app or the mobile app, they will only have access to the two surveys and their responses.

4. The client can, alternatively, use their user ID and password to log into Outcomes® Mobile on their mobile device.

5. The client will need to select whether they are a Canadian, U.S., or Internationally-based client.

6. After entering their user ID and password into the appropriate fields, they can click on the Sign-In bar to access the ORS/SRS.
   
   **Note:** There are no longer any temporary client passwords. To limit access, the provider can click Give Access, after the SRS has been registered, to reset the password. Choosing to do this will require the provider to generate a new password via the Give Access function. If emailing the password, use the Email PCOMS function to resend the client’s user ID and new password.

7. After logging in, the client will be prompted to complete the ORS.

8. The client will see the same instructions that are provided when the scale is administered on a computer.

9. After completing the four sub scales, the client will see a page summarizing their input.

10. These steps can be followed for the ORS/CORS and the SRS/CSRS/GSRS.

   **Tip:** The Give Access offers a way to administer the Group Session Rating Scale to all group members simultaneously, thereby providing near instant feedback and allowing more time to respond to group issues. Whether the group members are in the same place or different places, they can access their surveys using MyOutcomes® Mobile on their tablet or smartphone or by visiting the MyOutcomes web app in a browser on their computer or tablet.
The Client Console is the location where providers manage their work with specific clients. The ORS and SRS data are entered and tracked from the Client Console. Feedback Source data is also tracked from the Client Console. Client progress reports can be accessed from the Client Console. The client’s Client Status Report (CSR) is located on the Client Console page and a number of client-specific functions, e.g. deactivation, can be initiated from the Client Console. To access the Client Console, click on the client name on the Tree Directory or on the provider’s Home Page.
7.0 Client Status Report:

The Client Status Report (CSR) is located on the Client Console page. The CSR presents graphically three important pieces of information:

1. The Session Rating Scale (SRS) across therapy sessions. The SRS is a measure of the provider-client alliance for each session over time.

2. The Outcome Rating Scale (ORS) across therapy sessions. The ORS is a self-report of the clients’ subjective psychological well-being as they work towards their therapeutic goals.

3. The client’s actual change in ORS scores over the course of treatment relative to the expected change in scores calculated from the normative data pool in MyOutcomes. The client’s initial ORS score is used by MyOutcomes algorithms to calculate a predicted course for Success and Non-Success using the normative data of others with a similar intake score.

Tip: To ease reviewing important data, e.g. change notes, scores, skips, deactivate, reactivate, for a client at any point in therapy, simply move the mouse/cursor over any session date.
Information on the graph is color-coded for easy identification. To remove information from the graph, click on the item label in the graph legend to make it disappear. To return the information onto the graph, click on the item in the legend again.

The field of the CSR is composed of three sections:

- **On Track** is the green region in the top portion of the graph. ORS scores that land in this region indicate that the Service Target i.e. therapeutic goals have been achieved.

- **At Risk** is the yellow region in the middle portion of the graph. All clients with the same initial ORS score begin in this region. ORS scores falling in this region reflect average progress.

- **Off Track** is the pink region at the bottom of the CSR. Scores in this area are typically of concern as they indicate less than satisfactory progress or deterioration, with the client having a greater likelihood of dropping out or experiencing further deterioration.

The graph has six lines that, with the exception of the ORS and SRS cut-offs, represent different values at different points in time:
The SRS cut-off of 36 is represented by the horizontal grey line near the top of the CSR. Scores above the cut-off may be considered to reflect a positive therapist-client relationship, whereas scores below 36 indicate a relationship that is experiencing difficulties.

The ORS cut-off is the black horizontal line below the SRS cut-off. Scores below the clinical cut-off reflect individuals experiencing stress or poor well-being. ORS cut-offs vary as a function of the clinical population: Adults (18+ years) have a cut-off of 25, Teens/Adolescents (13-18 years) have a cut-off of 28, and Children (6-12 years) have a cut-off of 32.
The SRS is represented by a grey line that uses solid grey diamonds to show scores for each session.
The ORS is represented by a black line that uses solid black circles to show scores for each session.
The green Success curve is the border between At Risk and On Track. It can be made more visible by removing either the Off Risk or On Track backgrounds. The Success curve is calculated with MyOutcomes algorithms using the data of past clients who had the same initial ORS score. As can be seen by rolling the cursor over points where the Success score intersects with the Session, the score required for Success, i.e. the client successfully reaching their therapeutic goals, increases until it asymptotes.
The **brown Non-Success curve is the border between At Risk and Off Track.** ORS scores that fall below the Non-Success curve are of concern as they can predict deterioration and/or dropouts. The curve can be made more visible by removing either the Off Track or At Risk backgrounds. The Non-Success curve is calculated with MyOutcomes algorithms using the data of past clients who had the same initial ORS score. As can be seen by rolling the cursor over points where the Non-Success score intersects with the Session, the Non-Success score increases until it asymptotes.

**Note:** Placing the cursor over any point that corresponds to a session on the line will open a box that provides: the session number, the On-Track & Off-Track values at that point, the SRS & ORS cutoffs, the client’s SRS & ORS values for that session, the session type, and any notes created for that session.
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, Outcomes® 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 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 labelled 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 insure 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.

**Paper ORS for Client: 123456789**

- Enter a score for each ORS question
- Enter only the total ORS score

After scoring the paper-version ORS using a metric ruler, enter a score ranging from 0 to 10. Scores should be recorded to the nearest tenth of a centimeter, such as 3.4.

- **Individually:**
- **Interpersonally:**
- **Socially:**
- **Overall:**
- **Date:** 2016-12-19
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 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.

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 upper-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.
CHAPTER 9

Session Rating Scale

9.0 Administering the Session (Alliance) Rating Scale (SRS, CSRS, 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, Outcomes® 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).
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 labelled 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 Console 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.

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.
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 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.
9.5 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 list the individual couple IDs in the tree. Clicking on the individual ID will take you to the **Couple Member Console** of that individual.

<table>
<thead>
<tr>
<th>Couple Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
</tr>
<tr>
<td>Give Access</td>
</tr>
<tr>
<td>Give Access</td>
</tr>
</tbody>
</table>

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.
9.6 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.

9.7 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 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.
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 sessions. 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.

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.

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.
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 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.

![Couple Progress Report: Henry & Sally](image)

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.

![Group Progress Report: Henry & Sally](image)
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, Utilization 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.

11.0 Setting Dashboard Report Parameters:

Report parameters allow the user to define the search criteria of the client data used for creating Case Alerts, Key Performance Indicators, Utilization 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.
11.1 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.

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 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.
11.4 The KPI Real Time Data:

**Average Overall (Raw Change (ORS):** reports the difference between the Average Intake ORS score and the Average Most Recent ORS score. A score of 0 indicates no progress; a score of 6 or greater indicates a reliable clinical change. Keep in mind that if you are looking at active clients, these clients have not yet achieved full benefit from therapy.

**Average Change vs. Session Targets (ORS):** reports the difference between the Average Session Target for therapy (the CSR for average last session ORS) and the Average Most Recent ORS Score. A positive number indicates that clients are experiencing greater change compared to the CSR; a negative number indicates that clients are experiencing less change than the CSR. This is a very reliable way to consider how your active clients are doing.

**Percentage of Clients Scoring the Green Zone (successful outcome at the last measurement):** The Session Target is the ORS score predicted for a given session. It reflects the amount of reliable change greater than chance, maturation, and measurement error.

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.
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.

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.
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.

12.0 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.

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.
12.1 To Access Aggregate Statistics:
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.

The owner, administrator(s) and supervisor(s) can also access stats by clicking on the blue spreadsheet 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.

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.
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, or use Give Access to send them their User ID and Password so they can enter their scores on their own device.

Step 2: Administer the ORS/CORS 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/CORS. 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/CSRS/GSRS 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/CSRS/GSRS. 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 Compare Past Session Data, where you can choose up to 4 sessions for side-by-side comparison.
Appendix B
Glossary of Aggregate Stats Terms:

**Average Change**

**Average Intake ORS:** The average score for all clients on ORS 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.
Change vs. Service Targets

**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 intact 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:** The total number of scheduled appointments attended and where the 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 recent 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.
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 or 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 client’s 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.