Written Instructions
for the IPS Supervisors Data Table

Welcome to the Supervisors Data Table; below are a few general tips to get you started.

To watch a video covering this information, and including instructions pertaining to items on the IPS Quarterly Data Report, click here: Supervisors Data Table Instructions and Outcomes Reporting Items

This sheet is intended to help you accurately collect, calculate and track data related to IPS quarterly outcomes reporting (on the IPS Quarterly Data Report) and some fidelity metrics.

1) Start a new data sheet at the beginning of each calendar year, in order to maintain the most accurate and simplified data for IPS reporting. Instructions on this will follow.
2) An IPS supervisor or IPS specialist should only ever enter data on the *Master, Employment* and *Education* tabs. The information on all other tabs will auto calculate based on what is entered on these three tabs. The accuracy and timeliness of any auto calculation depends on the accuracy and timeliness of manual entries on the *Master, Employment and Education* tabs.
3) Anytime a client enrolls on the IPS caseload, complete the following columns on the *Master* tab:
    a. *Client Last Name*
        i. Write the last name in the field
    b. *Client First Name*
        i. Write the first name in the field
    c. *Referral Source*
        i. Write the referral source name in the field
    d. *Currently Active?*
        i. Choose "Y" from the drop-down menu to indicate the client is currently active in IPS; in the future when the client leaves the program, change this value to "N"
    e. *Active During Q1? (Q2? Q3? Q4?)*
        i. Choose "Y" or "N" from the drop-down menu under each column as appropriate
    f. *Gender Identity*
        i. From the drop-down menu, choose "F" (Female), "M" (Male), "T" (Transgender), "NB" (Non-binary) or "NA" (If the client prefers not to answer)
    g. *Sexual Orientation*
        i. From the drop-down menu, choose "G" (Gay/Lesbian), "H" (Heterosexual/Straight), "B" (Bisexual), "U" (Unsure), or "NA" (If the client prefers not to answer)
    h. *Race*
        i. From the drop-down menu, choose "W" (White), "B" (Black), "AI" (American Indian or Alaskan Native), "A" (Asian), "H" (Hispanic) "MENA" (Middle Eastern/North African), "HI" (Native Hawaiian/Pacific Islander), "O" (Other)
    i. *Employment Specialist*
        i. Write the first name of the assigned employment specialist in the field; if the assigned person is the supervisor, write "Supervisor," rather than that person's name
    j. *First Meeting w/ES Date*

i. Enter the month/day/year of the first meeting between the client and their employment specialist

k. *IPS Program Start*

i. Choose the quarter in which the client began IPS services from the drop-down menu

The remaining columns will be completed when there are changes in a client's education and employment status. Entry of information on the *Education* and *Employment* tabs is important so the data table accurately and separately calculates the total number of participants in education or employment per quarter, and the number of <u>new</u> education and <u>new</u> job starts during the quarter.

4) When a client starts school, training or a certificate program, on the *Master* tab, for each of the *Education Q1? Q2? Q3? Q4?* columns, choose "Y" or "N" as appropriate in real time. Then go to the *Education* tab, and in the appropriate columns, enter the *Participant Name*, the *Institute* or school where they are enrolled, their *Start Date* as month/day/year, and the name of their *Employment Specialist*. Once the participant ends their program, return to the *Education* tab and in the *End Date* column, enter the month/day/year that their program ended and the *Degree/Certificate/Training Earned*.
5) Back on the *Master* tab, in the *First FTF w/Employer Date* column, enter the month/day/year when the <u>first</u> face-to-face contact between the employment specialist and employer, or the client and the employer, occurred. This will be used in the auto-calculation of *# Days Between First ES and First FTF* column to track the Rapid Job Search item on the IPS Fidelity Scale.
6) When a client starts a job, on the *Master* tab, for each of *Employed Q1? Q2? Q3? Q4?* columns, choose "Y" or "N" as appropriate in real time. Then go to the *Employment* tab, and in the appropriate columns, enter the Participant Name, the name of their *Employer*, their *Job Type/Title*, their *Start Date* as month/day/year, the first name of their *Employment Specialist,* their *Starting Pay,* and *Hours per Week.* When they end their job, enter the *End Date* as month/day/year that their job ended.
7) Back on the *Master* tab, when a client is closed out of the IPS caseload, enter the month/day/year of their closure in the column *Closure Date*. In the column *Closed: Working or Unemployed?* use the drop-down menu to select "W" if the client was working upon closure, or "U" if they were unemployed upon closure.

The next section of this document will go through each of the items on the IPS Quarterly Data Report (online at https://reporting.ipsworks.org). You will find instructions on what data must be manually entered, where to enter it, and where you will find the auto calculations on the data spreadsheet. See accompanying videos (linked to items) for demonstration of how to work with your spreadsheet. Additionally, for quick guidance on these steps, you may refer to the **At-a-Glance Users Guide.**

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<u>Item 1</u>: Total number of people on caseload of IPS staff

<u>Clarifying information</u>: Include number of clients that are on the assigned caseload of the IPS supported employment staff, e.g., IPS specialist(s) and IPS supervisor, at any time during the reporting quarter. Only include those people (unduplicated, i.e., each individual should only be counted once) who received at least one employment service.

There will be people who were active during the previous quarter and are still active in the reporting quarter. They will only be counted once. There may be someone who received only one service during the reporting quarter, such as an assertive engagement outreach; that person should be counted for this item.

<u>Instructions</u>: On the *Master* tab, accurate information about whether each client on the caseload was active during a particular quarter is necessary. Focusing on the current reporting quarter, find that quarter's corresponding column and select "Y" on the drop-down menu for each client who was active, and "N" for each client who was not. If a person was open on the caseload and received at least one IPS service, they would be considered "active."

Once the information on the *Master* tab is accurate and complete, go to the *Quarterly Counts* tab. In the column, *# Active Per Quarter*, scroll down to the row containing the corresponding reporting quarter, and find your total.

<u>Item 2</u>: Number of people (unduplicated) from IPS caseload working integrated competitive employment at any time during the quarter

<u>Clarifying information</u>: Integrated competitive employment is defined as a community-based job that pays at least minimum wage, is available to any person, belongs to the worker and does not have time limits determined by the rehabilitation/mental health agency. "Unduplicated" means <u>counting each working person only once</u>, even if they held more than one job during the reporting quarter.

<u>Instructions</u>: On the *Master* tab, accurate information about whether each client on the caseload was working during a particular quarter is necessary. Focusing on the columns *Employed Q1? Q2? Q3? Q4?*, choose "Y" in the drop-down menus where appropriate, and "N" in those where appropriate. You should be able to reference the *Employment* tab to collect information based on employment dates for each person. However, entering information for each person in real time is best practice. Once the information on the *Master* tab is accurate and complete, go to the *Quarterly Counts* tab. In the column, *Number Employed*, scroll down to the row containing the current reporting quarter, and find your total.

<u>Item 3</u>: Number of people on IPS caseload enrolled in education programs during this quarter

<u>Clarifying information</u>: "Education" is defined as a "credit-bearing educational program" such as a technical school, college– for which the person will receive documentation upon completion. Include GED prep classes. Training and programs that award professional certification are also considered "education." This number should include individuals who were enrolled in education in the previous quarter and continued into this reporting quarter.

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__Instructions__: On the *Master* tab, accurate information about whether each client on the caseload was enrolled in an education program is necessary. Focusing on the columns *Education Q1? Q2? Q3? Q4?*, choose "Y" in the drop-down menus where appropriate, and "N" in those where appropriate. You should be able to reference the Education tab to collect information based on education dates for each person. However, entering information for each person in real time is best practice. Once the information on the *Master* tab is accurate and complete, go to the *Quarterly Counts* tab. In the column, *Number in Education*, scroll down to the row containing the current reporting quarter, and find your total.

__Item 4__: Number of people __working__ successfully in integrated competitive employment who transitioned off the IPS caseload during this quarter.

__Clarifying information__: These people are part of the total number on the caseload during the quarter.

__Instructions__: On the *Master* tab, accurate information about whether each person on the caseload has a closure date, and an indication they were working upon closure, is necessary. As applicable, enter the correct date in the column *Closure Date*, and enter "W" in the column *Closed: Working or Unemployed*? This is best done in real time when you close someone out of IPS. Once the information on the *Master* tab is accurate and complete, go to the *Quarterly Counts* tab. In the column *Closed/Working*, scroll down to the row containing the corresponding reporting quarter, and find your total.

__Item 5__: Number of people __NOT working__ successfully in integrated competitive employment who transitioned off the IPS caseload during this quarter.

__Clarifying information__: These people are part of the total number on the caseload during the quarter. People counted in this category transition off for a variety reasons, such as moved out of the area, no longer interested in working, or cannot be located.

__Instructions__: On the *Master* tab, accurate information about whether each person on the caseload has a closure date, and an indication they were unemployed upon closure is necessary. As applicable, enter the correct date in the column *Closure Date*, and enter "U" in the column *Closed: Working or Unemployed*? This is best done in real time when you close someone out of IPS. Once the information on the *Master* tab is accurate and complete, go to the *Quarterly Counts* tab. In the column *Closed/Not Working*, scroll down to the row containing the corresponding reporting quarter, and find your total.

__Item 6__: Number of people who are employment specialists with an IPS caseload (excluding the supervisor).

__Clarifying information__: The number reflects the employment specialists with an IPS caseload regardless of full-time or part-time status.

__Instructions__: This item must be manually calculated by the IPS supervisor, using their knowledge of the staffing of their program.

__Item 7__: Total FTE employment specialists (excluding the supervisor) with an IPS caseload.

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Clarifying information: FTE = full time equivalent. Include full time and part time positions. For example, 2 employment specialists working 20 hours/week = 1 FTE. This number is an accounting of the amount of time worked by your specialists, and should be smaller than or equal to the actual number of people who hold the positions.

Instructions: This item must be manually calculated by the IPS supervisor, using their knowledge of the staffing of their program.

Item 8: **Number of IPS clients on the supervisor's caseload.**

Clarifying information: This number is a subset of the total number of people on the IPS caseload in **Item 1**. This should not be a number of clients counted separately from that total number.

Instructions: On the *Master* tab, accurate information about which clients are assigned to the supervisor is necessary. In the column *Employment Specialist*, enter the word "Supervisor," not the supervisor's name, for each client assigned to the supervisor. This is important, as the calculating formula will only work with the word "supervisor" in the field. This is best done in real time when you add someone to the supervisor's caseload. Once the information on the *Master* tab is accurate and complete, go to the *Quarterly Counts* tab. In the column *# Supervisor Caseload*, scroll down to the row containing the corresponding reporting quarter, and find your total.

Item 9: **Number of new enrollees admitted to the IPS program during this reporting quarter.**

Clarifying information: This number is a subset of the total number served on the IPS caseload this quarter in **Item 1**.

Instructions: On the *Master* tab, accurate information about when each person started in IPS is necessary. In the row corresponding to the person's first and last name, in the column *IPS Program Start,* choose the quarter in which they enrolled in the IPS program from the drop-down menu. This is best done in real time when someone begins IPS. Once the information on the *Master* tab is accurate and complete, go to the *Quarterly Counts* tab. In the column *New Enrollees*, scroll down to the row containing the corresponding reporting quarter, and find your total.

Item 10: **Number of new job starts for all IPS participants during the quarter.**

Clarifying information: Include all job starts. This number is sometimes larger than the total number of people working (**Item 2**) if a single participant had more than one job start. For example, if one person starts three new jobs, that equals three job starts.

Instructions: When a client starts a job, on the *Master* tab, for each of *Employed Q1? Q2? Q3? Q4?* columns*,* choose "Y" or "N" as appropriate in real time. Then go to the *Employment* tab, and in the appropriate columns, enter the *Participant Name*, the name of their *Employer*, their *Job Type/Title*, their *Start Date* as month/day/year, the first name of their *Employment Specialist,* their *Starting Pay,* and *Hours per Week.* When they end their job, enter the *End Date* as month/day/year that their job ended. **Special note: If a person starts more than one new job during the quarter, you will enter their name and all the related information again in new rows. So, each new job should be reflected in its own row.**

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Once the information on the *Employment* tab is accurate and complete, go to the *Quarterly Counts* tab. In the column *New Employment*, scroll down to the row containing the corresponding reporting quarter and find your total.

Item 11: **Number of IPS clients who enrolled in education programs this quarter.**

Clarifying information: This number will be a subset of the total number enrolled in a credit-bearing education program this quarter (**Item 3**), as these are only people whose start in their education program occurred during this quarter.

Instructions: When a client starts a job, on the *Master* tab, for each of *Education/Training Q1? Q2? Q3? Q4?* columns, choose "Y" or "N" as appropriate in real time. Then go to the *Education* tab, and in the appropriate columns, enter the *Participant Name*, the name of their *Institution*, their *Start Date* as month/day/year, and the first name of their *Employment Specialist.* When they end their educational program, enter the *End Date* as month/day/year and enter their *Degree/Certification/Training Earned*. **Special note: In the rare case of a person starting more than one new education program during the quarter, you will enter their name and all the related information again in new rows. So, each new education program should be reflected in its own row.** Once the information on the *Education* tab is accurate and complete, go to the *Quarterly Counts* tab. In the column *New Education*, scroll down to the row containing the corresponding reporting quarter and find your total.

Demographic Items

Gender Identity

Instructions: On the *Master* tab, in the column *Gender Identity*, use the drop-down menu to select one of the following, according to how the person defines their gender. "F" for female, "M" for male, "T" for transgender, "NB" for genderqueer or non-binary, or "NA" if the person prefers not to answer. Once the information on the *Master* tab is accurate and complete, go to the *Demographic Data* tab. In the *Gender Identity Totals* column C, find your totals for each category. These totals will represent those individuals who are currently active on the caseload (not by quarter).

Sexual Orientation

Instructions: On the *Master* tab, in the column *Sexual Orientation*, use the drop-down menu to select one of the following, according to how the person defines their sexual orientation. "G" for gay or lesbian, "H" for heterosexual or straight, "B" for bisexual, "U" for unsure, and "NA" if the person prefers not to answer. Once the information on the *Master* tab is accurate and complete, go to the *Demographic Data* tab. In the *Sexual Orientation Totals* column G, find your totals for each category. These totals will represent those individuals who are currently active on the caseload (not by quarter).

Race

Instructions: On the *Master* tab, in the column *Race*, use the drop-down menu to select one of the following, according to how the person defines their race. "W" for white, "B" for black, "AI" for American Indian or Alaskan native, "A" for Asian, "H" for Hispanic, "MENA" for Middle Eastern or North African, "HI" for native Hawaiian or Pacific Islander, and "O" for other or if the person identifies as multi-racial. Once the information on the *Master* tab is accurate and complete, go to the *Demographic Data* tab. In the *Race Totals* column E, find your totals for each category. These totals will represent those individuals who are currently active on the caseload (not by quarter).

The Supervisors Data Table can also be used to collect and track data relevant to select IPS fidelity items. Instructions for collecting and tracking this data are below.

To watch a demonstration video pertaining to items on the IPS Quarterly Data Report, click here:

Fidelity Items Calculated in the Supervisors Data Table

Fidelity Item: **Number of people on each IPS specialist's caseload**

Instructions: On the *Master* tab, individuals' names, whether they are currently active or not, and the name of the IPS specialist whose caseload they are on are necessary to have completed. To pull a specialist's total caseload, place your cursor in the *Employment Specialist* column, and click on the *Sort & Filter* button in the tool ribbon at the top of the screen. Click "Filter" on the drop-down menu. A down arrow appears. Click the down arrow, generating that drop-down menu containing the names of each employment specialist and boxes to check or un-check, depending on which specialist you are filtering for. Choose the name of the specialist whose caseload you wish to count, ensuring that only their box is checked. Click "Ok" and the data table will return the list of people that that specialist is currently serving. Find the count of people on the caseload at the bottom left of the page.

You will want to return to the full list of all individuals and all IPS specialists by clicking "Clear" on the *Sort & Filter* drop-down menu.

Fidelity item: **Number of people enrolled in school**

Instructions: See instructions for Item 3 for the quarterly data report (above).

Fidelity item: **Number of mental health teams each IPS specialist is connected to (via referral source)**

Instructions: On the *Master* tab, the referral source for each person and the name of the assigned IPS specialist are necessary pieces of information to have completed.

Place your cursor in the *Employment Specialist* column. Click on the Sort & Filer button in the tool ribbon at the top of the screen. Click "Custom Sort" in the drop-down menu. Click "Add Level" in the window that opens. In the "Sort by" row, choose "Employment Specialist." In the "Then by" row, choose "Referral Source." Then click "OK." The table will sort itself so that you may easily see which and how many referral sources are associated with each IPS specialist and the supervisor. To return your sheet to the way it was prior to performing this function, use the keyboard shortcut, Control + Z.

Fidelity item: **Rapid job search**

Instructions: On the *Master* tab, the columns *First Meeting w/ES Date* and *First FTF w/Employer Date* for each person are necessary pieces of information to have completed. To find the number of days in between these two dates (auto-calculated), look at the column, *# Days Between First ES and First FTF*.

Fidelity item: Number of people currently working

Instructions: See instructions for Item 2 for the quarterly data report (above).

Fidelity item: **Diversity of job types**

Instructions: On the *Employment* tab, the *Job Type/Title* column must be completed and accurate for each working person. A visual review of this column will provide the necessary information to determine diversity of job types.

Fidelity item: **Diversity of employers**

Instructions: On the *Employment* tab, the *Employer* column must be completed and accurate for each working person. A visual review of this column will provide the necessary information to determine diversity of employers.

Fidelity item: **Number and dates of closed cases**

Instructions: On the *Master* tab, the columns *Closure Date* and *Closed: Working or Unemployed?* must be completed and accurate. Place your cursor in the *Closure Date* column and click the “Sort & Filter” button at the top of the screen. Choose “Custom Sort” from the drop-down menu:

Click “Add Level” in the window that opens. In the “Sort by” row, choose “Closure Date.” In the “Then by” row, choose “Closed: Working or Unemployed.” Then click “OK.” The table will sort itself so that you may easily see who, when and how many people have been closed and their employment status. To return the table to its previous organization, use the keyboard shortcut Control + Z.