



## FSSD Scheduling Report Guide



This guide provides technical information and additional program instructions for users accessing the Iowa Scheduling Report for the FSSD DAISEY module.

The Iowa FSSD Scheduling Report allows family support professionals and program managers to determine what tasks are ahead as well as review the overall completion status of each task.

Tasks will show up when a task is first eligible to be completed for actively enrolled primary caregivers and their children during the selected date range. Due dates for activities are defined by program guidelines outlined in the FSSD data dictionary.

### Report Filters

Parameters will be applied to each dashboard when modified. Users will only be able to access data according to their access assignment(s) in DAISEY. The following filters and parameters can be used to change the data displayed in the report.

Start Date and End Date allows selection of any date range of interest. Dates will default to the current fiscal year.

Home Visitor allows selection of home visitors who have their names in the Family Support Professional field on a caregiver profile.

**\* Home Visitors may have entered their name more than one way on the primary caregiver profile (Sally, Sally Smith, Sally S.). All versions will appear in the report despite being the same person. By selecting the HV name on the Caseload Tasks dashboard, it will list all families with that HV name listed. They can note the families where the name is listed incorrectly and make the change in DAISEY. The home visitor name should be consistent in DAISEY for the most accurate data.**

Caregiver Name (ID) filters by primary caregivers.

Activity allows for the selection of one or more specific DAISEY forms/activities.

Organization allows selection of one or more DAISEY organizations, with access limited to only organizations assigned to the DAISEY user.

Program allows selection of one or more DAISEY programs, with access limited to only programs assigned to the DAISEY user; data in the report is linked to the program selected on the primary caregiver profile in DAISEY.

## Definitions

**Date Eligible:** The first day a task can be completed. For example, a postnatal enrollee client will first be eligible for an EPDS at enrollment because it is due within 3 months of enrollment.

**Due Date:** The last day a task can be completed. For example, a postnatal enrollee client's due date for an EPDS would be Enrollment + 3 months.

## Completion Status Categories

Activities are listed by the following categories:

**Not Yet Eligible:** Today is before Date Eligible for the task.

**Not Yet Completed:** Today is between Date Eligible and Due Date and no activity has been completed during this window. (Note: if assessment is completed early, the 'Not Yet Completed' status will remain in reports until the Due Date, at which time, the status will change to 'Completed Early'.)

**Completed on Time:** The task has been completed between its Date Eligible and Due Date window.

**Completed Late:** Today is after the Due Date and an activity has been completed after the Due Date.

**Completed Early:** Today is after the Due Date and an activity has been completed before the Date Eligible. Furthermore, tasks completed before their Date Eligible are counted as 'Not Yet Completed' between their Date Eligible and Date Due, and then 'Completed Early' after the Date Due has passed.

**Missing:** Today is after the Due Date and no activity has been completed.

**\*It's important to note that if an activity is completed far past the due date, it may remain in the Missing category once completed since it does not meet the completion window guidelines, which may undermine the screener results.**

## What Is Counted

All activities of primary caregivers and their children who are actively enrolled and have a task eligible for completion during the date range selected.

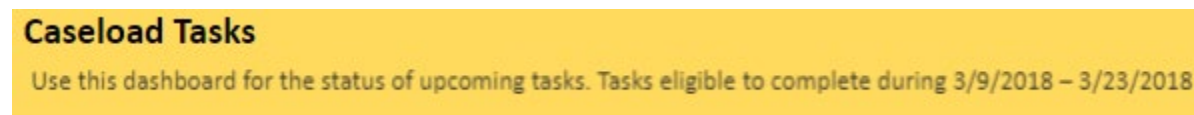
## What Is Not Counted

- Caregiver Profile
- Child Profile
- FSSD Staff Profile
- Home Visit Review Form

## Caseload Tasks Dashboard

The Caseload Tasks dashboard is designed to provide DAISEY users with a snapshot of tasks that are coming due during the selected range.

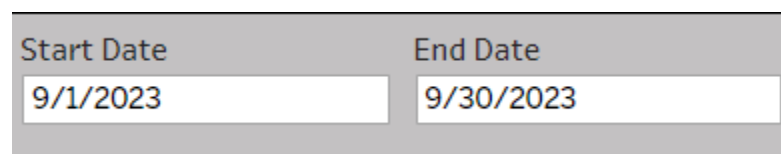
The header of this report indicates the date range selected (Figure 1).



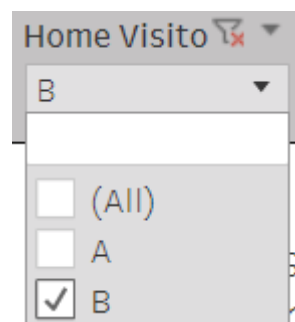
Once the filters are selected, the report will show a stacked bar graph displaying the count of tasks by completion status, as well as a table providing details on each task eligible for completion.

Example: A home visitor would like to see the status of tasks coming due in the next month for all the families they work with.

First, select the appropriate date range (Figure 2):

A form with two input fields. The first field is labeled 'Start Date' and contains the text '9/1/2023'. The second field is labeled 'End Date' and contains the text '9/30/2023'.

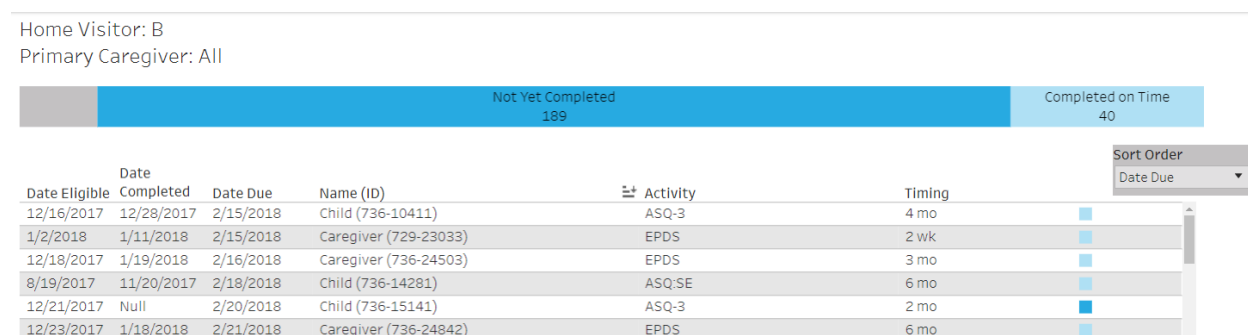
Next, use the Home Visitor filter to select the appropriate Home Visitor (Figure 3)

A dropdown menu for 'Home Visito'. The selected option is 'B'. Below the dropdown, there is a list of options with checkboxes: '(All)', 'A', and 'B'. The checkbox for 'B' is checked.

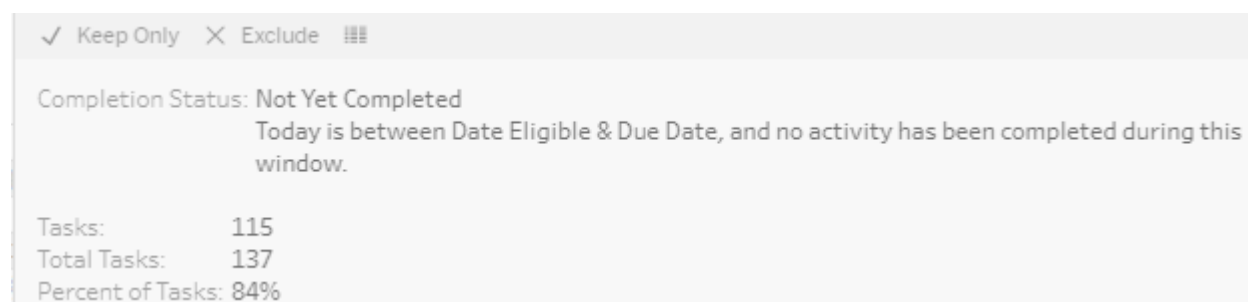
**\*NOTE: Home Visitors may have entered their name more than one way on the primary caregiver profile (Sally, Sally Smith, Sally S.). All versions will appear in the report despite being the same person. By selecting the HV name on the Caseload Tasks**

**dashboard, it will list all families with that HV name listed. They can note the families where the name is listed incorrectly and make the change in DAISEY. The home visitor name should be consistent in DAISEY for the most accurate data.**

The total number of tasks eligible for completion in the range for the selected home visitor are represented in the top bar, while the table below provides a detailed breakdown of those tasks by associated DAISEY Name and ID (Figure 4). To select activities due for a specific family, unselect "All" and select the specific DAISEY ID or name in the Primary Caregiver Name drop-down menu of the client you would like to see.



To see certain categories, click on the bar and select "Keep Only" or "Exclude" to individualize the report (Figure 5). Also, simply selecting and then deselecting a category in the bar will also alter the results in the table.



This table lists when a task is first eligible, the date the task was completed (NULL if not yet completed), when the task is due, name of the person who is eligible, name of the task, which timing of the task is due, and the status of the task, i.e. NYC (Not Yet Completed) or CoT (Completed on Time).

If there is confusion as to why a completed DAISEY activity is pulling into a completion category, the report logic and criteria for that activity can be viewed by hovering over the completion status bar in the table (Figure 6).

Name (ID):	Caregiver (639-28566)
Primary Caregiver (ID):	Hidden Name (639-28566)
Enrollment Date:	10/26/2240
Discharge Date:	
Child Date of Birth:	*(corrected for ASQ-3: *)
Home Visitor:	M
Activity:	LSP
Timing:	ongoing
Date Eligible:	5/2/2021
Date Completed:	7/28/2021
Due Date:	7/2/2021
Completion Status:	Completed Late

Today is after the Due Date, and an activity has been completed after the Due Date.

ASQ-3	Some	CL
LSP	ongoing	CL

## Completion Status Dashboard

The Completion Status dashboard is designed to provide DAISEY users with an overview of tasks eligible for completion listed by completion status. The dashboard is intended to allow organizations to review their task completion for a selected date range and assess their success rate with completing tasks in a timely manner. The dashboard displays Completion Status labels above completion status bars for each task represented in the date range and organization, and a list on the right displays the breakdown of task completion status by Name and DAISEY ID.

Program managers or supervisors should run the Completion Status dashboard at least quarterly to monitor task completion.

Programs may use this dashboard to track progress related to data quality improvement plans or other quality improvement projects focused on task completion.

The header of this report indicates the date range selected (Figure 7).

### Completion Status by Activity

Tasks eligible to complete during 2/7/2018 – 3/9/2018

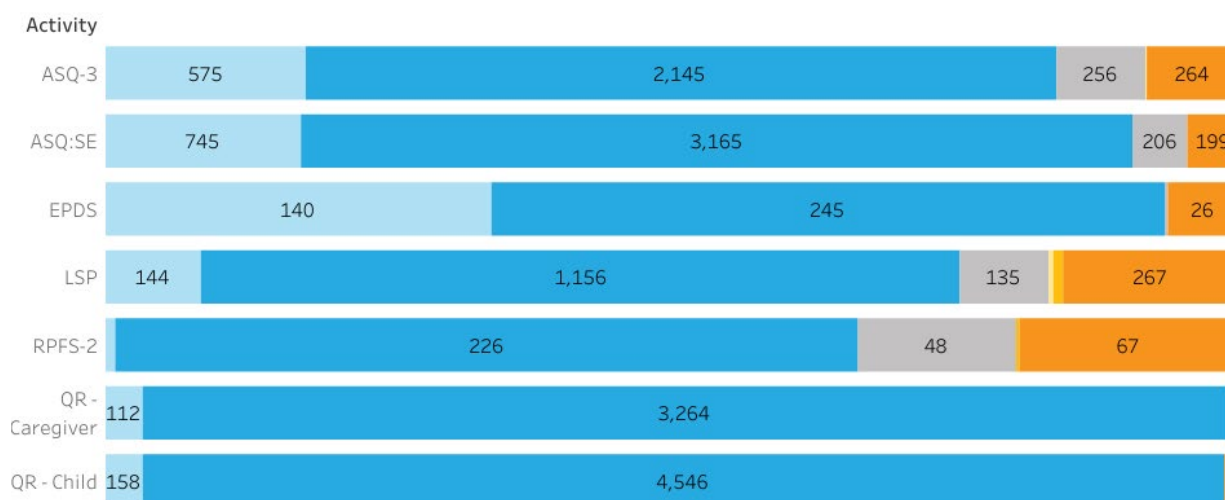
Any filters applied to the Caseload Tasks dashboard will also be applied to the Completion Status dashboard, so you may want to select new filters on this dashboard. Once the filters are selected, stacked bars will display each activity selected in the filter.

Example: A supervisor would like to review program activity completion for the previous calendar month and determine whether any tasks are frequently showing as “Missing” or “Completed Late.”

First, select the appropriate range (Figure 8).

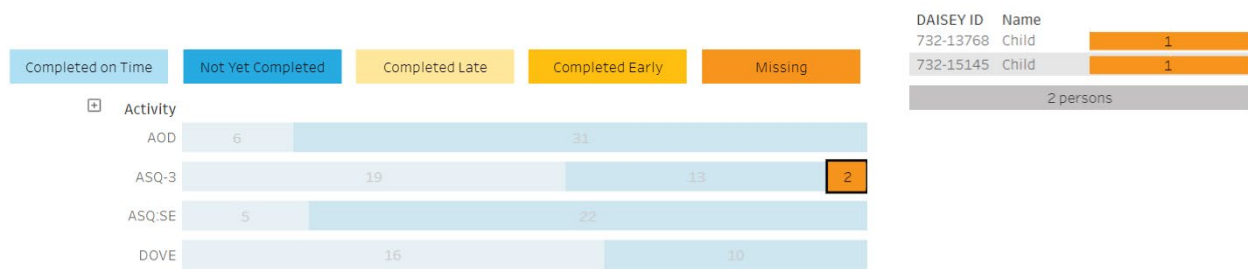
Start Date	End Date
9/1/2023	9/30/2023

The report will show each activity that was eligible for completion within the selected range, as well as a breakdown by DAISEY ID and participant name on the right side of the dashboard (Figures 9 & 10) for those that were eligible for an activity.

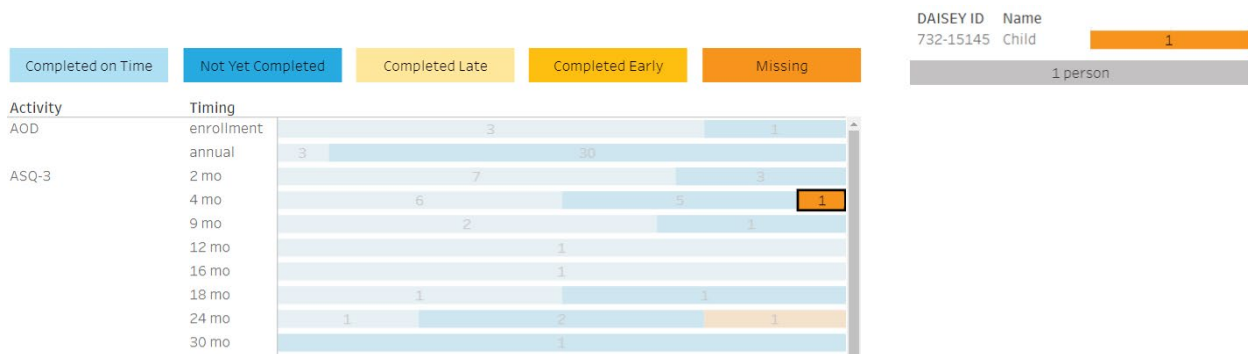


729-16426	Child	2	1
729-11678	Child	3	
729-18137	Child	1	3
729-14615	Child	2	1
729-13994	Child	2	1
729-11507	Child	1	2
729-16337	Child	1	2
729-11615	Child	1	2
729-17192	Child	1	2

To see the “Missing” ASQ-3’s, select the orange section of the ASQ-3 bar and the list on the right will reflect clients missing the ASQ-3 (Figure 11). This function applies to all Completion Status categories.



To determine which ASQ-3 timing is missing, select the “+” symbol to the left of the Activity heading as shown in Table 6. Each activity will have the required timings listed. Find the missing items and select them, and the list on the right will provide the DAISEY ID of the client missing that assessment (Figure 12).



## SCHEDULING REPORT ACTIVITY GUIDANCE

<u>Activity</u>	<u>Timings</u>	<u>Date Eligible</u>	<u>Date Due</u>
ASQ-3	2 months, 4 months, 9 months, 12 months, 16 months, 18 months, 24 months, 30 months, 36 months, 42 months, 48 months, 54 months, 60 months	“timing” Date Eligible	“timing” Date Due
ASQ:SE-2	2 months, 6 months, 12 months, 18 months, 24 months, 30 months, 36 months, 48 months, 60 months	“timing” Date Eligible	“timing” Date Due
EPDS Enrollment	Other, Not screened – Already in services	Enrollment Date	3 months from Enrollment Date
EPDS prenatal	6-12 weeks postnatal, Not screened – Already in services	Target child birthdate + 6 weeks	Target child birthdate + 12 weeks
LSP discharge	Discharge Date	Discharge Date – 1 month	Discharge Date
LSP Initial	w/in 1 month from DOE	Enrollment Date	1 month from Enrollment Date
LSP Ongoing	every 6 months from DOE	2 months before Date Due	6month Enrollment anniversary
PFS -2 Retrospective Version	One-time completion per caregiver enrolled at least 6 weeks	6 weeks from DOE	12 weeks from DOE
Quarterly Report – Caregiver	Once per quarter	Quarter begin	Discharge+15 days or Quarter End+15 days, whichever is earlier
Quarterly Report – Child	Once per quarter	Quarter begin	Discharge+15 days or Quarter End+15 days, whichever is earlier