

***No Wrong Door
Integrative Screener
Individual-Level
Aggregate Workbook
v.3.0***

User Guide



**University of Maryland, Baltimore County
Department of Psychology
Center for Community Collaboration**

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Purpose of this Manual

This user guide is intended to assist direct care service providers, agency directors/supervisors and staff to understand and incorporate integrative screening practices within their settings, using the *No Wrong Door Integrative Screener Individual-Level Aggregate Workbook*. The information contained in this guide is designed to provide:

- An overview of the *No Wrong Door Integrative Screener Individual-Level Aggregate Workbook* and general tips for administration
- Instructions to guide the use of the *No Wrong Door Integrative Screener Individual-Level Aggregate Workbook* in its electronic version using a computer or tablet
- Examples to demonstrate the overall screening process, from start-to-finish, using the *No Wrong Door Integrative Screener Individual-Level Aggregate Workbook*

Disclaimer. The information captured by the *NWD Integrative Screener Individual-Level Aggregate Workbook* is considered protected health information (PHI). The information captured should be safeguarded in accordance with an individual agency's privacy practice and the Health Insurance Portability and Accountability Act of 1996 (HIPAA). This user guide does not provide instructions on how to use the *NWD Integrative Screener Individual-Level Aggregate Workbook* in a manner that is HIPAA compliant. All questions regarding the security of client PHI should be directed to the HIPAA compliance or privacy officer within individual agencies.

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About the Authors

The Center for Community Collaboration (CCC) is located in the University of Maryland, Baltimore County (UMBC) Department of Psychology. The CCC was initially created as a university-community collaborative with the Infectious Disease Bureau (IDB), Prevention and Health Promotion Administration (PHPA), of the Maryland Department of Health and Mental Hygiene in 2004. Our mission has been to provide capacity building and training services for the implementation of evidence-based practices within direct care services agencies.

The following current and former CCC staff, contributed to the writing of this manual:

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CONTACT US

Questions regarding the content of this user guide, use of the *No Wrong Door Integrative Screener Individual-Level Aggregate Workbook*, and requests for technical assistance should be directed to:

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Using the NWD Integrative Screener as a Data Collection Tool *Individual-Level Aggregate Workbook*

The *NWD Integrative Screener* is designed to be user friendly for providers and agencies. Many items and health domains that agencies are often required to report to local, state, and/or federal entities have been included to help reduce reporting burden. In addition to lessening reporting burden, it can help with initial treatment planning or treatment plan updates. As a way to help with the reporting or treatment planning process, providers can collect individual-level data for one client across multiple time points to see the degree to which symptoms and level of risk change as the client is engaged in treatment using the *Individual-Level Aggregate Workbook*.

Using the Data Collection Tool

It is important to note that client names will not be included in the *Individual-Level Aggregate Workbook*. All client responses will be identified based on client ID.

Each row of data represents a time point at which the *NWD Integrative Screener* was completed for a single client. For each time point, the data collection tool tracks:

- Subscale scores for each health domain
- Referral need, agreement, and whether the referral was made (yes/no)
- Readiness ratings for each health domain
- Individual items score

7	DATA	24.999	25.000	22.222	0	3	2	0	0	0	0	0	3	4	0	1	0	0	0	N/A
8	DATA	49.998	50	22.222	0	3	3	0	0	0	4	0	2	3	0	1	0	0	1	0
9	DATA	33.332	50	22.222	0	3	3	0	0	0	4	0	1	4	0	1	0	0	0	N/A
10	DATA	41.865	25	22.222	0	3	4	0	0	0	4	0	0	4	0	1	0	0	1	0
11	DATA	24.999	25	22.222	0	3	2	0	0	0	0	0	0	4	0	1	0	0	0	N/A

Individual-Level Aggregate Workbook

For each time point, the *Individual-Level Aggregate Workbook* tracks:

- Subscale scores with graphs to show change in scores where appropriate (physical health status, mental health symptom severity, resiliency, substance abuse, sexual health risk)
- Whether a referral was needed and made (when indicated)
- Readiness ratings for each health domain
- Frequency counts and/or average scores for individual items

To obtain individual-level data, two Excel® workbooks must be open on the computer:

- 1) The *NWD Integrative Screener* workbook (either client or provider version)
- 2) The *Individual-Level Aggregate Workbook*

IMPORTANT: Make sure you are opening and saving a new version of the *NWD Integrative Screener* Excel® workbook for each time point. Data is only stored for one time point within each *NWD Integrative Screener* Excel® workbook. Overwriting a client’s responses at a given time point will also change the data presented within the **Data Sheet** tab of the workbook. Additional rows of data cannot be added in the *NWD Integrative Screener* Excel® workbook

The next few pages outline steps for obtaining individual-level data using the *Individual-Level Data Aggregate Workbook*.

For technical assistance and support or to request a copy of the *Individual-Level Aggregate Workbook* please contact UMBC’s Center for Community Collaboration at 410-455-5840 or

communitycollaboration@umbc.edu

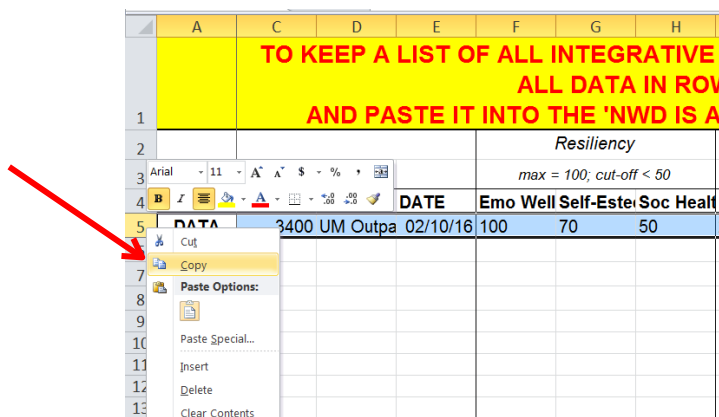
Steps for Using the *Individual-Level Aggregate Workbook*

1. Upon completing pages 1-6 and the **Interview Page** of the *NWD Integrative Screener* electronically, values for responses at the given time point will populate in the **Data Sheet** tab in the *NWD Integrative Screener Excel®* workbook.

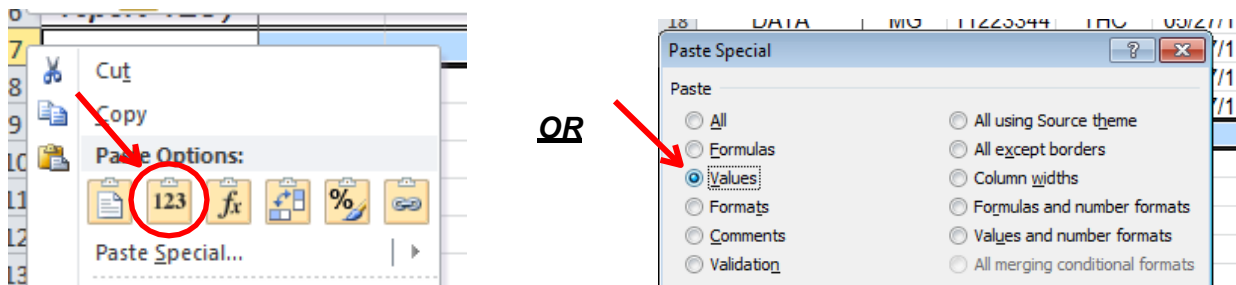
ITEM	ID	AgName	DATE	Emo Well Self-Este Soc Heal	Phys Hea Perc Heal Disability Pain	Anx-Depr Depressi Anxiety Trauma
DATA	3400 UM Outpa	02/10/16	100	70	50	20 0 0 50 14.286 10 24.999 25

Note. If the **Data Sheet** tab is not currently visible in the *NWD Integrative Screener Excel®* workbook, the tab is likely hidden. To unhide, right-click any of the tabs and from the options select “unhide”. A menu of the hidden tabs will appear, select the **Data Sheet** tab and then click OK.

2. Open the **Data Sheet** tab (shown above). Right click on the row number in the **Data Sheet** tab containing the client’s responses (to highlight the entire row) and select “Copy.”



- Open the **Individual-Level Aggregate Workbook** and paste the responses on the next available line in the **Raw Data** tab. Since values are attached to code within the **NWD Integrative Screener** workbook, you will need to “Paste as Values” rather than pasting as you normally would. To do this, right click the row number in the **Individual-Level Aggregate Workbook** and select the paste option designated by the “123 clipboard” icon. Alternatively, you can select “Paste Special” and select the “Values” option.



Note. Pasting without specifying the Values option will result in error messages.

- Repeat steps 1 through 3 to add new time points within the **Individual-Level Aggregate Workbook**.

IMPORTANT: The provider will have a copy of the **Individual-Level Aggregate Workbook** for each client. The workbook can hold **Integrative Screener** data for a client up to 5 time points (e.g., baseline, 3 months, 6 months, 9 months, and discharge).

Note. Tables displayed in the **Health Domain Sheets** (see below) are currently set to read up to five data points to readily display data collected every three (3) months for a one year period. Ways to adjust this to include more time points will be discussed below.

1. COPY DATA (ROW 5) FROM 'DATA SHEET' WITHIN THE INTEGRATIVE SCREENER WORKBOOK 2. PASTE AS 'VALUES' (RIGHT CLICK --> PAST SPECIAL --> VALUES [123 Clipboard]) **DO NOT ALTER ROWS 2-6!**											
				<i>Resiliency</i>			<i>Physical Health</i>				
				<i>max = 100; cut-off = 50</i>			<i>max = 100; cut-off = 50</i>				
ITEM	ID	AgName	DATE	Emo Well-being	Self-Esteem	Soc Health	Physical Health	Perceived Health	Disability	Pain	Anx-DepriDe
MEANS (if applicable)				84.00	70.00	56.00	26.00	30.00	0.00	50.00	25.71
Freq. Counts (if applicable; report 'YES')											
DATA	3400	utpatient Psy	04/03/15	100	70	50	20	0	0	50	14.286
DATA	3400	utpatient Psy	06/12/15	70	70	60	30	50	0	50	42.858
DATA	3400	utpatient Psy	08/07/15	70	70	70	30	50	0	50	28.572
DATA	3400	utpatient Psy	10/03/15	80	70	50	30	50	0	50	28.572
DATA	3400	utpatient Psy	02/10/16	100	70	50	20	0	0	50	14.286

Additional Aspects of the *Individual-Level Aggregate Workbook*



Raw Data Tab

Within the **Raw Data** tab, means (averages) and frequency counts are calculated (when applicable) to give an overall understanding of the client's functioning across time. Also included are cut-off scores indicating referral needs for each health domain/subscale.

Data Codebook Tab

The **Data Codebook** tab provides information on each of the subscales and individual items listed, including ranges and cut-off scores needed to determine subscale referral needs, as well as value labels for each individual item (e.g., 0 = None, 1 = Some, 2 = A Lot).

Health Domain Sheets

There are health domain tabs (Demographics, Physical Health, Mental Health, Substance Use, HIV-ID Risk, HIV-ID Testing, and Stigma) that display output similar to what is presented on the electronic **Feedback Sheets** within the *NWD Integrative Screener* workbook. The information included in the health domain sheets is automatically populated based on the data copied from the *NWD Integrative Screener* workbook. There are some aspects that are consistent across all health domain sheets that are worth noting before looking at the information specific to each health domain:

- **Data Collection Dates:** The user entering or reviewing the data will need to manually type in today's date and the range of dates for which the data apply (i.e., dates for the first and last time point entered into the dataset) on the **Demographics** tab; dates will automatically copy over to the other health domain sheets. Specific instructions for this are included in comments within the cells (marked with a red arrow).

No Wrong Door Integrative Screener 3.0
Individual-Level Data

Demographic Information			
Today's Date:	06/09/15	Client ID:	3400
Data Collected Between:	04/03/15	to	06/09/15
Number of Screeners Completed:	5		

- ☐ **Tables:** As previously noted, tables are currently set to display up to five (5) time points.

Date	Sex/Drug-Linked Behavior				Other Risk		
	High Se	More Fre	Self-	Recover	Jail	IDU	Needle
04/03/15	Yes	Yes	Yes	No	No	No	No
06/12/15	Yes	Yes	No	No	No	No	No
08/07/15	Yes	No	No	No	No	No	No
10/03/15	No	No	No	No	No	No	No
02/10/16	No	No	No	No	No	No	No

If needed, tables can be expanded to include additional time points:

- 1) Left click on the small black triangle in the bottom right corner of the table

No	No
No	No
No	No
No	No

2) Drag down to include the desired number of rows

Sex/Drug-Linked Behavior					Other Risk		
Date	High Se	More Fre	Self-	Recover	Jail	IDU	Needle
04/03/15	Yes	Yes	Yes	No	No	No	No
06/12/15	Yes	Yes	No	No	No	No	No
08/07/15	Yes	No	No	No	No	No	No
10/03/15	No	No	No	No	No	No	No
02/10/16	No	No	No	No	No	No	No



3) To delete rows, simply drag up to remove desired rows and then clear the contents from the rows that are no long included in the table

Sex/Drug-Linked Behavior					Other Risk		
Date	High Se	More Fre	Self-	Recover	Jail	IDU	Needle
04/03/15	Yes	Yes	Yes	No	No	No	No
06/12/15	Yes	Yes	No	No	No	No	No
08/07/15	Yes	No	No	No	No	No	No
10/03/15	No	No	No	No	No	No	No
02/10/16	No	No	No	No	No	No	No

SHIR Referral		Risk Reduction Referra		HIV/ID Testing Referral		Overall	
Date	Risk-SH	Ref Mad	Risk-RR	Ref Mad	Risk-Tes	Ref Mad	Readine:
04/03/15	No	N/A	No	N/A	Yes	No	N/A
06/12/15	Yes	No	Yes	No	Yes	No	N/A
08/07/15	Yes	No	Yes	No	Yes	No	N/A
10/03/15	Yes	No	Yes	No	Yes	No	N/A
02/10/16	No	N/A	No	N/A	Yes	No	N/A

A brief description of the information captured in each of the Health Domain Sheets in the **Individual-Level Aggregate Workbook** is provided below.

Demographics

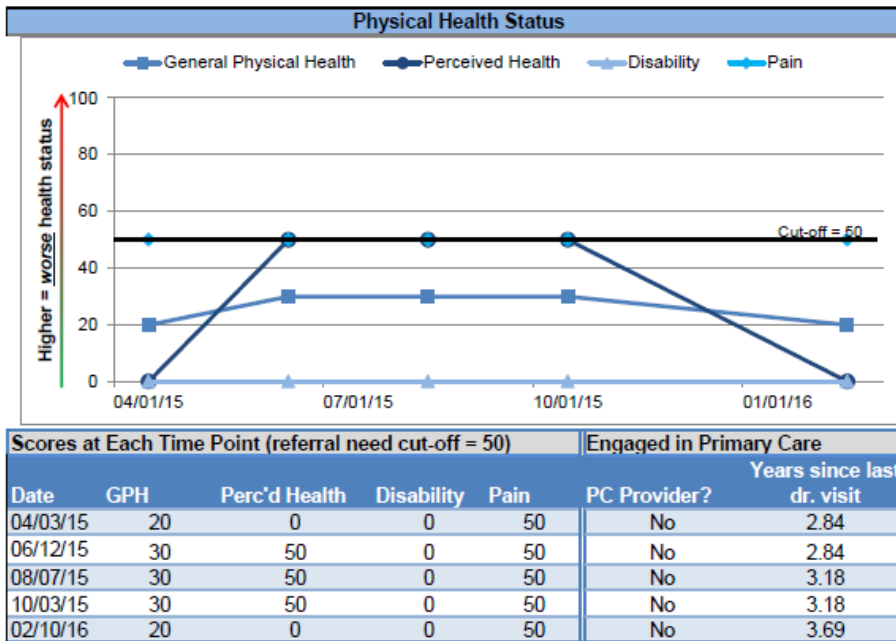
- Stable demographic items from the initial screen (e.g., date of birth, age, sex assigned at birth)
- List of additional characteristics at each time point

From Initial Screen on: 04/03/15							
Date of Birth: 03/15/81							
Age (at first screen): 34							
Country of Origin: USA							
Primary Language: English							
Race: Black/African American Native Hawaii							
Ethnicity: Not Hispanic/Latino(a)							
Sex Assigned at Birth: Female							

Information Across Time Points:							
Date	Time in the US	Housin	Educati	Veteran Status	Jail	Gender Identity	Sexual Orientation
04/03/15	N/A (born in US)	Rent or Own House/Apt	Some College	No	No	Female	Straight/Heterosexual
06/12/15	No Change	No Change	No Change	No Change	No Change	No Change	No Change
08/07/15	No Change	No Change	No Change	No Change	No Change	No Change	No Change
10/03/15	No Change	No Change	No Change	No Change	No Change	No Change	No Change
02/10/16	No Change	No Change	No Change	No Change	No Change	No Change	No Change

Physical Health

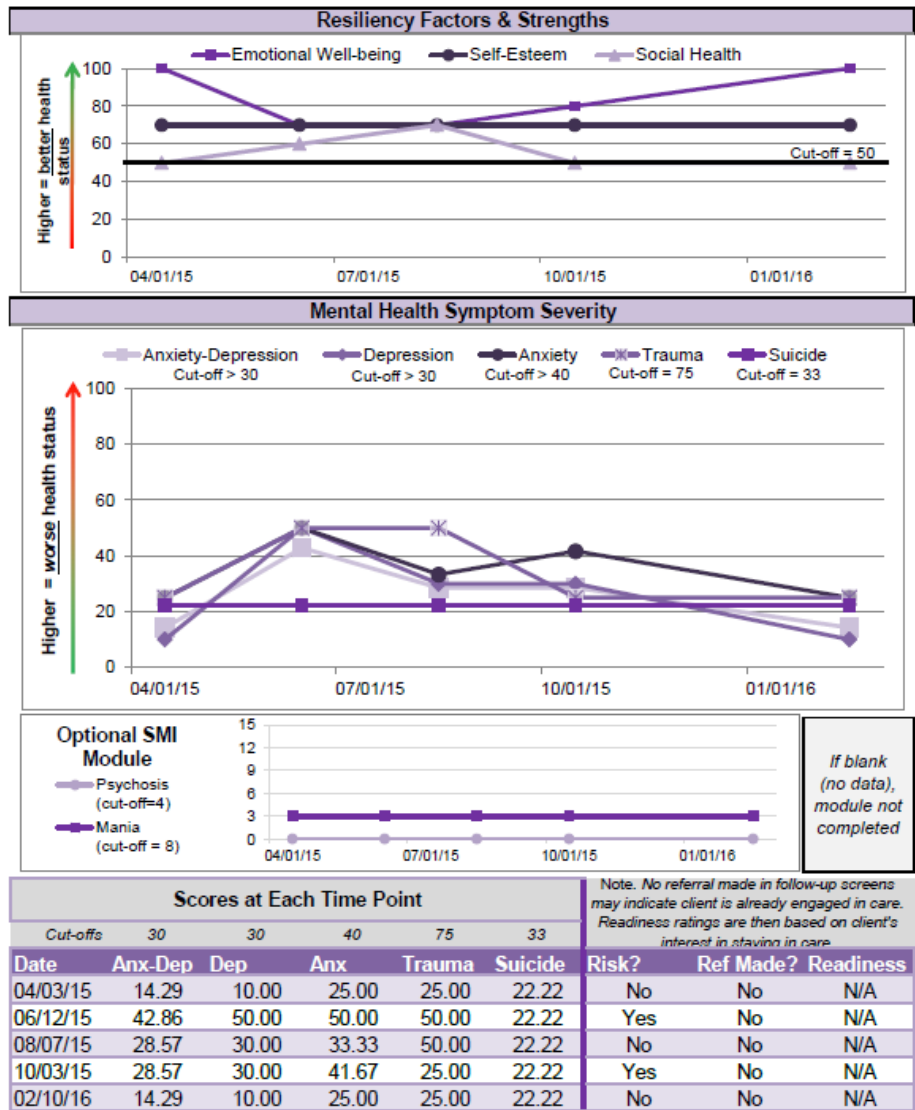
- Graph of changes in physical health status (general physical health, perceived health, disability, and pain) across time
- Table of subscale scores at each time point
- Table of engagement with primary and prenatal care at each time point
- Table of identified risk and referral needs at each time point
- Readiness rating for addressing physical health concerns at each time point



Prenatal Care			Risk Identified & Referral Made			
			<i>Note. No referral made in follow-up screens could indicate that client is already engaged in care. Readiness ratings are then based on client's interest in staying linked to care.</i>			
Date	Pregnant?	Prenatal Care?	Date	Risk?	Ref Made	Readiness
04/03/15	No	FALSE	04/03/15	Yes	No	6
06/12/15	No	FALSE	06/12/15	Yes	No	6
08/07/15	No	FALSE	08/07/15	Yes	No	6
10/03/15	No	FALSE	10/03/15	Yes	No	6
02/10/16	No	FALSE	02/10/16	Yes	No	6

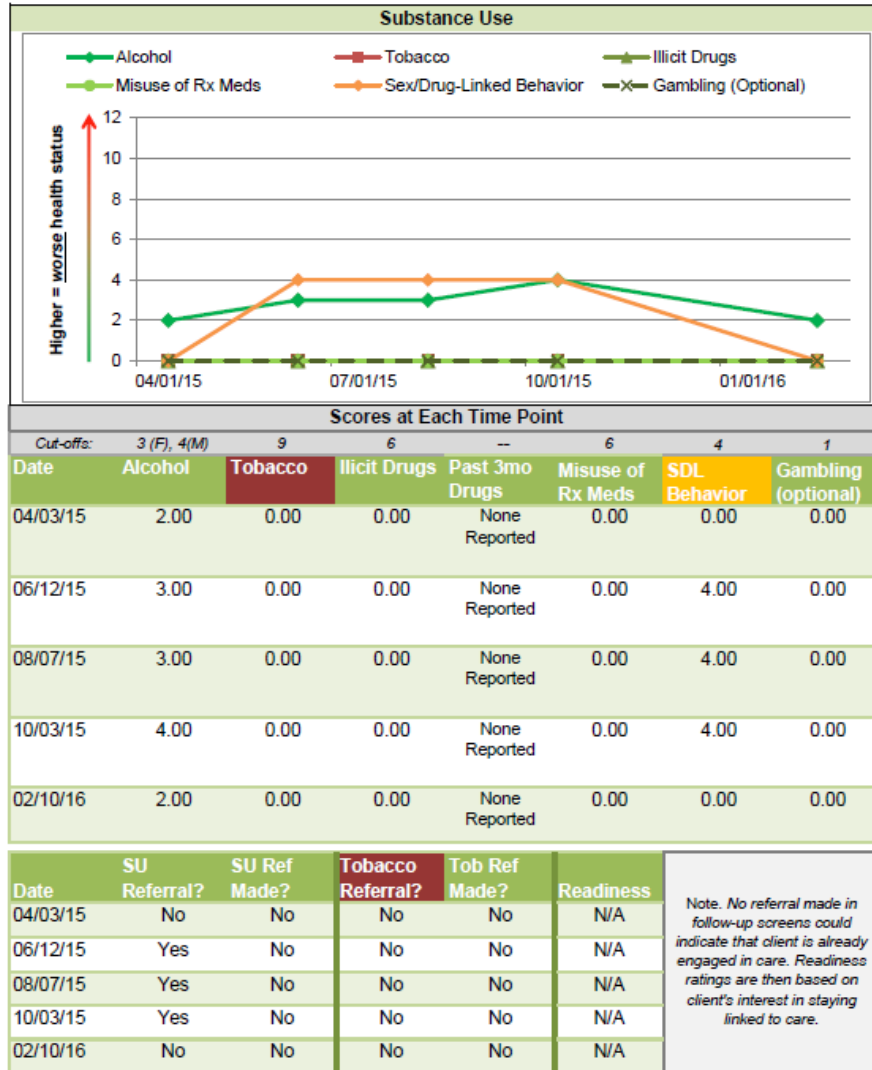
Health

- Graph of changes in resiliency factors (general emotional well-being, social health, self-esteem) across time
- Graph of changes in mental health symptoms (depression, anxiety, trauma, suicide) across time
- Table of symptom severity subscale scores at each time point along with cut-off scores at which referrals are indicated
- Table of identified risk and referral needs at each time point
- Readiness rating for addressing mental health concerns at each time point



Substance Use

- Graph of changes in substance use severity (alcohol, tobacco, illicit drugs, misuse of prescription medications, sex/drug-linked behavior) across time
- Table of subscale scores and illicit drugs used (within past three months) at each time point along with cut-off scores at which referrals are indicated
- Table of identified risk and referral needs at each time point
- Readiness rating for addressing substance use concerns at each time point



HIV-ID Risk

- Graphs of changes in HIV/ID risk behavior (sex/drug-linked behavior, sexual risk behavior, needle sharing, incarceration) across time, including a legend for cut-off scores
- Tables of subscale scores at each time point
- Tables of identified risk and referral needs at each time point for Sexual Health in Recovery/Sexual Health Programming, Sexual Risk Reduction Counseling, and HIV/ID Testing
- Readiness rating for addressing HIV/ID risk at each time point



HIV-ID Testing

- Tables of HIV and other infectious disease testing history and status documented at each time point
- Table including HIV treatment engagement and adherence, if HIV-positive
- Tables of identified testing referral needs at each time point, with a list of specific tests needed. Also included is a table indicating referral needs for HIV treatment engagement or adherence support.
- Table including readiness to accept a referral for HIV/ID testing and/or treatment

HIV and Infectious Disease Testing History						
HIV Testing						*Note. Time since last test refers to time in years. ----- Treatment Engagement and Adherence will be N/A if HIV Test Status is Negative
Date	HIV Tested	Time* Since Last Test	Test Status	Treatment Engagement	Treatment Adherence	
04/03/15	Yes	2.84	Negative	N/A	N/A	
06/12/15	Yes	2.84	Negative	N/A	N/A	
08/07/15	Yes	3.18	Negative	N/A	N/A	
10/03/15	Yes	3.18	Negative	N/A	N/A	
02/10/16	Yes	3.69	Negative	N/A	N/A	

Infectious Disease Testing in Past 12 months						
Date	Gonorrhea	Chlamydia	Syphilis	Hepatitis C	Hepatitis B	Tuberculosis
04/03/15	Yes	No	No	No	No	No
06/12/15	Yes	No	No	No	No	No
08/07/15	Yes	No	No	No	No	No
10/03/15	Yes	No	No	No	No	No
02/10/16	Yes	No	No	No	No	No

Most Recent Infectious Disease Testing Result						
Date	Gonorrhea	Chlamydia	Syphilis	Hepatitis C	Hepatitis B	Tuberculosis
04/03/15	Negative	Negative	Negative	Negative	Negative	Negative
06/12/15	Negative	Negative	Negative	Negative	Negative	Negative
08/07/15	Negative	Negative	Negative	Negative	Negative	Negative
10/03/15	Negative	Negative	Negative	Negative	Negative	Negative
02/10/16	Negative	Negative	Negative	Negative	Negative	Negative

HIV and Infectious Disease Testing Referrals						*Note. Readiness ratings are then based on client's interest in receiving any infectious disease testing (including HIV).
Date	HIV Ref Need?	HIV Referral Made	ID* Ref Need?	ID Referral Made	Readiness*	
04/03/15	No	N/A	Yes	No	5	
06/12/15	No	N/A	Yes	No	5	
08/07/15	No	N/A	Yes	No	5	
10/03/15	No	N/A	Yes	No	5	
02/10/16	No	N/A	Yes	No	5	

Specific Infectious Disease Testing Needed						
Date	Gonorrhea	Chlamydia	Syphilis	Hepatitis C	Hepatitis B	Tuberculosis
04/03/15	No	No	No	No	No	No
06/12/15	No	No	No	No	No	No
08/07/15	No	No	No	No	No	No
10/03/15	No	No	No	No	No	No
02/10/16	No	No	No	No	No	No

Stigma (Optional Module)

- Graphs of changes in stigma (mental health, substance use, HIV+, and MSM) across time, including cut-off scores. The Serious Mental Illness and Gambling modules do not produce separate tables displaying individual-level aggregate results. These are grouped with the mental health and substance abuse tables, respectively.

