MTL Manual

Team PSD

2021-03-16

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# 1 *Modeling to Learn* Technical Manual

Welcome to the *Modeling to Learn* manual for learners, facilitators, and administrators. This manual includes links to all guides, cheatsheets, and resources, needed to walk through *Modeling to Learn Blue* and *Red*.

# 2 Introduction - *Modeling to Learn* Manual

Welcome to the *Modeling to Learn* for learners, facilitators, and administrators.

**Click within chapters and subsections** or use the **built-in search feature using the magnifying glass in the top left** to search throughout the manual for key terms.

# 3 2.1 Learner

## 3.1 MTL Red Part 1

Today we’re modeling to learn from patient data and team trends.

### 3.1.1 Done and Do (15 minutes)

|  |  |
| --- | --- |
| **Done** | **Do** |
| We logged in to mtl.how/data to look at the facility data. | We will build our team in the *MTL* Data User Interface and review our team data. |

### 3.1.2 Learning Objectives

1. Describe the decisions your team made in producing your team data table.
2. Test whether team historical trends shown in the “viz” tabs reflect your expectations.
3. Apply your clinical expertise to identify new information about a team patient in the “data” tabs.

### 3.1.3 In-session Exercise (30 minutes)

*MTL* on BISL

1. Open an internet browser window. Go to mtl.how/data. First select your VISN and then select your facility.

[![data ui login screen cast](data:text/html; charset=utf-8;base64,)](#DontLink)

1. Explore the facility data.

* To **view facility data** click on the […] next to the file **“facility.xlsb”** and click **“Edit”** to open in Excel.
* **Team files are in team folders.** If you do not see a team folder, click on **“Request New Team Folder”** in the horizontal header next the BISL logo.

[![data ui splash page screen cast](data:text/html; charset=utf-8;base64,)](#DontLink)

* Click through the tabs on the bottom of the Excel spreadsheet. What options are there and what do they mean? Hints:
  + Data: Sortable report of data
  + Diag: Diagnostic data
  + Enc: Encounter types of visits
  + HF: Health Factors data related to visits
  + Meas: Measures or flag names
  + Viz: Visualization of trends
* What filtering options are available?
  + Filter to your clinic or division to see trends for the last two years.
* vizDiag shows unique visits by primary diagnosis on the visit of PTSD, Dep, OUD, or AUD.

NOTE: Refresh your data if you are experiencing issues or discrepancies within the data and filtering facilities/clinics.

* To **refresh your facility file’s data**, right click on any tab at the bottom of the Excel spreadsheet and select **“Unhide…”**.
* In the **“Unhide sheet:”** dropdown, select **“Control”** and click **“OK”**.
* In the **“Control”** tab, select your VA facility’s station number in the **“Station:”** dropdown and click **“Refresh”**.
  + Do not worry if you see your **Excel worksheet become unresponsive as the data is refreshing and will take about 1-2 minutes to complete**.
* **Warning: Do NOT click “Propagate”** as this is used by our data team to update facility data across the nation.

[![edit excel screen cast](data:text/html; charset=utf-8;base64,)](#DontLink)

### 3.1.4 Your Team Data Folder

1. Scroll to your team folder at the bottom of the page. Open the data\_ui folder and open your data\_ui file in Excel.

* Click on the 3 dots
* next to the data\_ui file.
* Click on “Edit” to open in Excel, then click “Edit Workbook” at the top of the sheet.

[![edit excel screen cast](data:text/html; charset=utf-8;base64,)](#DontLink)

1. Go to the ClinicSelection tab. Use columns C-H to select the clinics that make up your team.

* You can sort and filter by Clinic Name, Division Name, Physical Location, Primary Stopcode, Secondary Stopcode, and Default Provider.
* Note: This will pull all clinics used in the last two years, including de-activated clinics (denoted by a “ZZ” prefix). You can also see the de-activated clinic’s inactivation date in column I.
* Follow the instructions in **Box A2.**
* After filtering, click the “Add All” arrow in column B (Cell B6). Fine-tune your selections by double-clicking on the clinic name in column A (to remove) or column C (to add).
* In the future, if you want to quickly get the same list of clinics again, you can select the grey “Get previous clinic list from last click of Get Patient-level Data” arrow in Column B (Cell B3).

1. To view your team patient data and your team trends click “Get Patient-level Data.” We will not do this in-session today.

* **You already have a fresh data UI file to work with in your team data\_ui folder.**
* We will learn about the “Create Team Data Table” button in our next team meeting.
* **To query patient and clinic level data using the data\_ui, you will need LSV permissions.** To check which facilities you have LSV access for, click [here](https://spsites.cdw.va.gov/sites/PBM_AD/_layouts/15/ReportServer/RSViewerPage.aspx?rv%3aRelativeReportUrl=/sites/PBM_AD/AnalyticsReports/LSVAccessVerification.rdl) (VA intranet only).
* **If you don’t have access to facilities that you believe you should, please verify:**
  1. CPRS access/permissions at your station (i.e COR tab access for CPRS).
  2. Your network username recorded in VistA. To have your network username recording in VistA, please follow the instructions outlined [here](https://vaww.dev.fre.cdw.va.gov/sites/D05_VISN21/DashboardDevelopment/Updating%20Network%20UserName%20in%20VistA.aspx) (VA intranet only).

NOTE: It takes some time to run a query from your team data UI to the VA Corporate Data Warehouse.

* On average (depending on the size of your team) it may take 15 minutes or so for your team data UI to pull in fresh data, and Microsoft Excel will be unresponsive until the data UI has finished pulling in your data.

[![session 2 data ui screen cast](data:text/html; charset=utf-8;base64,)](#DontLink)

1. Click to view the “viz” tab, which show team trends.

* There are team trends for diagnoses, encounters, health factor data (e.g., suicide plans, evidence-based practice templates), and measures from Mental Health Assistant.
  + What stands out to you?
  + What is most important to you to check out first?
  + What is most surprising?

[![data ui 4 screen cast](data:text/html; charset=utf-8;base64,)](#DontLink)

* Click on any trend line and then “Quick Explore” (look for the magnifying glass). In the “Explore” box, pick the item you want to explore and click “Drill To.” Keep using the Quick Explore to drill until you reach the data you want.
  + To return to the original settings, click on the gray “Reset Pivot Chart.”
  + The viz tabs will also return to default selections, when you click “Get Patient-level Data” for new data pulls.
* Right click on a trend line and filter to hide a selected item or only keep the selected item.
* vizDiag in the data UI shows a drill down by diagnoses or combination of diagnoses.

[![data ui screen cast](data:text/html; charset=utf-8;base64,)](#DontLink)

* For Veterans Video Connect (VVC), use the VVC filter in the vizEnc tab.

[![vvc_filter](data:text/html; charset=utf-8;base64,)](#DontLink)

1. Click to view the “data” tab, which show your team’s individual patient information.

* Patients who have requested restricted access to their information have asterisks (\*\*\*\*) in Columns F & G. If you are a VA provider, you can still identify patients from Column H.
* Patient information corresponds to the same categories as the team trends: diagnoses, encounters, health factor data (e.g., suicide plans, evidence-based practice templates), and measures from Mental Health Assistant.
* Providers can filter to find specific patients, or produce reports.
* dataDiag in the data UI has an additional column after “Diagnoses of Interest,” called “Primary Diagnoses”, specifying which diagnosis is primary.

[![primary diagnosis screencast](data:text/html; charset=utf-8;base64,)](#DontLink)

* What **data** tab would you use to find out how many current patients on the team are engaged in a specific evidence-based psychotherapy? What column shows you the session number (EBP template) that the patient is on?
* What **viz** option would you use to see what the most common service encounters or visits are?
* Are there services that have been increasing over time? Are there services that have been decreasing over time?

With the team trends (viz) and team patient (data) information in the data UI, your team can efficiently use team meetings to focus on the interrelated issues of care coordination and team quality improvement.

### 3.1.5 Done and Do (15 minutes)

|  |  |
| --- | --- |
| **Done** | **Do** |
| We selected the clinics that make up our team for the Team Data UI. [data ui screen cast](#DontLink) | Review the HF, Diag, Enc and SP tabs in Team Data UI to find a patient (zoom in) and find a team trend (zoom out). Log in to mtl.how/data and look at the two team folders: data\_ui and team\_data\_table. [data ui screen cast](#DontLink) |

## 3.2 MTL Red Part 2

Today we’re modeling to learn how to calculate team parameters.

### 3.2.1 Done and Do (15 minutes)

|  |  |
| --- | --- |
| **Done** | **Do** |
| We reviewed the HF, Diag, Enc and SP tabs in Team Data to find a patient and a team trend. We logged in to mtl.how/data and looked at the two team folders: data\_ui and team\_data\_table. [session 2 data ui screen cast](#Xa52ce780950d4d969792a2559cd519d7ee8c727) | We will examine calculated team parameters for CC, MM, PSY, AGG, and SP. [session 3 data ui parameters screen cast](#Xa52ce780950d4d969792a2559cd519d7ee8c727) |

### 3.2.2 Learning Objectives

1. Describe your team trends over the last two years based on the estimates in the team data table.
2. Test your understanding of how the team data are estimated by reviewing descriptions and definitions.
3. Apply your clinical expertise to consider the team trends in the data UI and team data table to identify team priorities for learning.

### 3.2.3 In-session Exercise (30 minutes)

When you click the “Create Team Data Table” button, it produces a table of descriptive team data.

* We will not do this in-session today. You already have a fresh Team Data Table to work with in your team\_data\_table folder.
* Data are means, medians and percentages of key variables likely to influence the team’s priorities for learning from *Modeling to Learn*
* There are team data produced for each module of *Modeling to Learn*
  + Care Coordination (CC)
  + Medication Management (MM)
  + Psychotherapy (PSY)
  + Aggregate team services (AGG)
  + Measurement-based stepped care and suicide prevention (SP)
* Select a set of clinics in **ClinicSelection tab** similar to what you did for the data UI.
* In the future, if you would like to use the same clinic selections for pulling new parameters, you can select the “Get previous clinic list from Create Team Data Table file” arrow in Column B (Cell B4).
* If you want to produce a team data table for the **SP module**, click on the **SPReferrals tab**. Use this tab to select clinics that your team refers to/receives referrals from for the Measurement Based Stepped Care and Suicide Prevention module. The data pull will track patients stepped up/down between your team and the one(s) you select. For example, if you are a GMH team, you would select “SMH” in the dropdown for “The clinics selected below that my team refers to are” and add the SMH clinics your team refers to in Column A. Once you have selected referral clinics in the **SPReferrals tab**, return to the “ClinicSelection” tab.
* [![sp referrals screen cast](data:text/html; charset=utf-8;base64,)](#DontLink)
* Click on the module drop-down to select the module you want and select “Create Team Data Table.” You can generate a team data table for each of the modules individually, all the modules without SP (called “All without SP”), or all the modules with SP (called “All with SP”). - When you select a team data table option for specific modules, the team\_data\_table file you generate will have all five module tabs and labels, but will populate 0s for all other parameters that were **not** selected.
* If you included SP in the module selection, three pop-ups will appear for the three possible care settings (GMH, SMH, PC/PCMHI) to indicate the threshold for minimum gap in patient care required for subsequent visit to be considered a new care episode. *In general for the (GMH or SMH or PC/PCMHI) setting, how long of a gap in patient care is required for the subsequent visit to be considered a new care episode? Set the threshold below in weeks. The default threshold is 39 weeks (9 months).*
* [![three pop ups screen cast](data:text/html; charset=utf-8;base64,)](#DontLink)

1. Select a module for review

* Find a variable that is important to your team. How is it estimated in this table? What are its units?
* Where can you find even more detailed information about your team data?
* Check out the last two columns. What is the difference between these two columns?

1. Select a second module for review

* Check out the last two columns.
* Find a variable that is important to you team. How is it estimated in this table? What are its units?
* Where can you find even more detailed information about your team data?

1. Are there any team data table values you would like to explore in the team data UI?

* If so, which ones? Open the data UI to examine your question.

1. Does the team see any values in the team data that seem to vary significantly from expectations?

* If so, what is surprising? Does the estimation definition (second to last column, text in red) help you to interpret the variable value?

1. Does the team see any values in the team data that fit your expectations about high priority team needs?

* If so, what are you noticing? In what ways does the team data fit with your day-to-day clinical practice in your team?

[![session 3 data ui screencast](data:text/html; charset=utf-8;base64,)](#DontLink)

### 3.2.4 Done and Do (15 minutes)

|  |  |
| --- | --- |
| **Done** | **Do** |
| We examined team parameters for CC, MM, PSY, AGG, and SP. [session 3 data parameters screen cast](#Xa52ce780950d4d969792a2559cd519d7ee8c727) | Find something in the team data table and consider its implications for team decisions. |