WHĀRAURAU | The Choice and Partnership Approach (CAPA)

Choice and Partnership Approach (CAPA): Service data for implementation | Aotearoa NZ example

This document summarises key points from the video 'CAPA and Service Data for Implementation', presented by the Marinoto ICAMHS team in the Waitematā District. The purpose is to provide an easy-to-use reference version of the data examples and dashboards discussed in the video presentation.

The video explains the importance of working closely with your data team to develop accurate reporting and dashboards to support the effective implementation of CAPA. The data used in this example is extracted from two systems: Patient Information Management System (PIMS) and HCC.

- PIMS provides reports such as admission, discharge, and contact activity.
- HCC produces information on interventions and HoNOSCA.

Together, these data sources input into the dashboards shown in the video presentation.

Choice appointments: How to calculate what you need

To calculate how many Choice appointments your service needs to offer, you can use two key pieces of referral information:

1. The number of accepted referrals in any given quarter (accepted referrals are those that are accepted into your service).
2. Your annual number year-to-date (YTD) of accepted referrals and compare this with the previous year. Using last year's quarter as a comparison point helps you forecast demand.

   For example:
   Look at Quarter 2 from last year. How many accepted referrals did you receive during that period? This gives you a baseline for how many Choice appointments you would typically need per week e.g. 120 accepted referrals = 10 Choice appointments per week.

   Now, check your current YTD accepted referrals. Are you receiving more or fewer compared to last year? Calculate the percentage increase or decrease. Apply the percentage to last year's quarterly referral numbers. This figure gives you the likely number of Choice appointments required for the current year, e.g. YTD there has been a 10% increase in accepted referrals from last year, therefore we need to provider an extra 10% per week = 12 Choice appointments per week.

It is recommended to plan for the highest number you might need, to ensure the team has enough flexibility to meet demand.

In order to gather the above information, you will need to build a report that gives you the ability to:

- Select a date range
- Select 'accepted referrals' only
- Select a sub - team, e.g. youth team, remote team (to understand variations within each team).
- Export data into excel to allow analysis

The team also compiled the following details in this report to support an in-depth analysis which could be looked at in team days to support workforce planning and job planning, e.g. what age groups are we seeing?

NHI, client name, date of birth, current age, age at referral, gender, ethnicity, school, domicile description, referral start and end dates, and referral source.

Partnership appointments: How to calculate what you need

1. Know your conversions rates from Choice to partnership
2. Number of face to face (FtF) or direct contacts per episode (this impacts your job plan multiplier)
3. Number of accepted referrals and number of discharges every month (flow management – do you need a Letting Go day?)
4. Current case load (see current case load report below)

In order to gather the above information, you can set up a Discharge Report that gives you the ability to:

- Select a date range
- Select a sub - team, e.g. youth team, remote team (to understand variations within each team).

The team also compiled the following details in this report:

NHI, client name, age at referral, Discharge date, Days in service, Discharge reason (e.g. treatment completed, lost to follow up), Discharge referral source, Primary diagnosis, Case Worker, Direct contacts/FtF (to help you work out average FtF contacts, for job plan multiplier), Contact duration.

This services also has a **Current Case Load** report to understand exactly who is in service at any time.

This reports on:

NHI, Client Name, Age, Gender, School, Partnership Clinician/Choice Clinician, Service open date, Intervention (which will be blank if new referral or Choice), Last HoNOSCA, FtF Contacts, Days Open, Open Principal Diagnosis

Other reports

This service also monitors **Choice outcome** and **Referral information** monthly, entering the data into a spreadsheet and producing graphs to track trends. This helps teams understand their flow - for example, whether accepted referrals are outstripping discharges, and if a Letting Go day may be needed.

Choice outcome – number of:

- New partnerships
- Resolved at Choice appointment
- Referred to NGO
- Choice DNA
- Choice + 1 (phone/video)
- Choice + 1 (FtF)

How to keep track of what happens at a Choice appointment?

This team used a paper form like below (the only paper form they used as a service):

DUTY APPOINTMENT BOOKINGS

CLIENT DETAILS

Client Name:

Sub Team: ☐ Youth ☐ Child ☐ Remote

Choice Appt: ☐ **ADHD Choice Appt:** ☐ **Urgent Appt:** ☐ Y

APPOINTMENT DETAILS

Date: **Time:** **Location:**

DUTY CLINICIAN – please tick

☐ Confirmed with client and/or caregiver
☐ Documented in HCC notes
☐ Entered into Outlook Choice and sent
☐ Choice care plan open in HCC
☐ Interpreter required/booked ☐ Y ☐ N
☐ Cultural support required/booked ☐ Y ☐ N

ADMIN TO COMPLETE – please tick

☐ Placed into CHOICE/URGENT folder ☐ Appointment letter sent

CHOICE CLINICIAN TO COMPLETE – please tick

☐ Acc into partnership, if Yes, Issues: Partnership clinician:
☐ Resolved at point of contact
☐ Not for our service – referred onto (please specify):
☐ Choice +1 – please specify: ☐ F2F ☐ Phone/Video
☐ DNA
☐ Made contact to reschedule ☐ Y ☐ N
☐ No contact made (send a DNA letter) ☐ Y ☐ N
☐ Attach demographic and consent form
RETURN ALL paperwork to admin

ADMIN TO COMPLETE – please tick

☐ Update PIMS/HCC with demographic information
☐ Scan Consent form into HCC
☐ Update Outlook Choice appointment with outcome
(If for partnership – follow process)

The manager will then collate these forms at the end of the month and update the spreadsheet. They used a similar form for urgent appointments to track outcomes.

Referral Information – number of:

- Total referrals
- Accepted referrals
- Rejected referrals
- Urgent
- Discharges

Client Dashboard

The service also provides a Client Dashboard for each client, enabling the team to monitor HoNOSCA scores and track their progress through the service. This supports caseload supervision by allowing staff to review each case, discuss current circumstances, and consider Letting Go plans. All information is sourced directly from the electronic clinical record (HSS) and automatically fed into the dashboard.

Dashboard

Demographic:

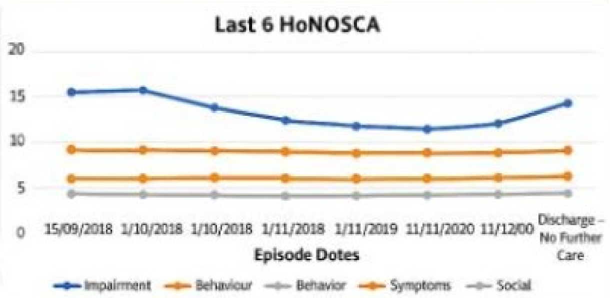
Age at Referral	15
Current Age	16
Ethnicity	New Zealand Europoan
Gender	Male
Smoking Status	Has never Smoked

Diagnosis:

Principal	MajerDepressive Disorder
Other	

Forms Completed:

Transition Plan	Completed
Choice Letter	Completed
Family Violence	Completed
Smoking Cessation	Completed
Family Contacts *(client present)*	0



	Total Score	New Referral	2 menth Review	3 month Review	Family Canexform
Total Score	14	5	1	1	0
Impairment	3	2	3	3	3
Behaviour	3	2	3	3	3
Symptoms	3	3	3	3	3
Social	5	3	3	3	0
Date	15/09/2018	11/09/20211	11/11/11	21/30/203	7/05/2020

Days Since:

F2F Contact	87
Last HoNOSCA	10

Upcoming Dates:

Next HoNOSCA	6/09

Treatment:

Referral Open For:	376
Days waited	29
Days to First	18
Total Contacts	155
Criss Contacts	4
Intervention: *(Client not present)*	0
Intervention:	CBT specific

Episodes:

CASE TITLE	Past
Child & Youth	1