IPS Grow Reporting Tool User Guide

Updated: 20th April 2020

Welcome to the IPS Grow Reporting Tool

The IPS Grow Reporting Tool is designed to help IPS Services manage their data and report to different stakeholders. This is a web-based tool which will read services' spreadsheets and create reports at different levels (Team Level, Service Level, Stakeholder, STP, Regional, and National).

The Tool allows services to manage their data and report to different stakeholders. The Reporting Tool can be used to:

- Upload performance spreadsheets
- View performance dashboards across your teams or services
- Share reports with your commissioner
- Report to NHS England (if you are a Wave 1 or Wave 2 area)

The Tool is designed to read spreadsheets with certain headings (more details on adopting the IPS Grow Standard Spreadsheet or adjusting your existing spreadsheet can be found **here**) and aggregate the data to create reports for performance monitoring.

The IPS Grow Standard Spreadsheet has been designed in partnership with providers, commissioners and national stakeholders to cut down what is being collected to focus on only information that is used for decision-making and to drive consistency in data collection in the IPS sector.

The IPS Grow Standard Spreadsheet is the recommended method for IPS services to record client information for reporting purposes. **Download it now from the IPS Grow website. Or download directly here.**

This Guidance Document:

Please read the section(s) that respond to your account type

Logging In

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Account Types

There are a number of different account types for different users of the Reporting Tool:

Team Level

For Team Leaders and Team Members

Service Level

For Service Leads, Team Leaders (with multiple teams) and anyone responsible for external reporting

Stakeholder Level

For Local Funders e.g. CCGs and Local Authorities, Contract Managers and/or partner Trusts

STP Level

For anyone external to the service involved in NHS England Reporting at an STP or CCG Level

Regional Level

For DCOs and Regional Leads involved in NHS England reporting

National Level

For NHS England Central

When you have registered for the Tool and received your login details, this should correspond with one of the above account types. If you feel you have been given access to the wrong account type, contact support at **support@ipsgrow.org.uk** with an outline of your role role and duties and this will be reassessed for you.

What does each account type allow you to see or do on the tool?

The reporting tool can be used to:

View dashboards on service performance

Submit or view NHS England Quarterly Returns

Upload spreadsheets to automatically aggregate data

Share information with stakeholders

The next page highlights the possible actions and views for each account type.

Account Type Access

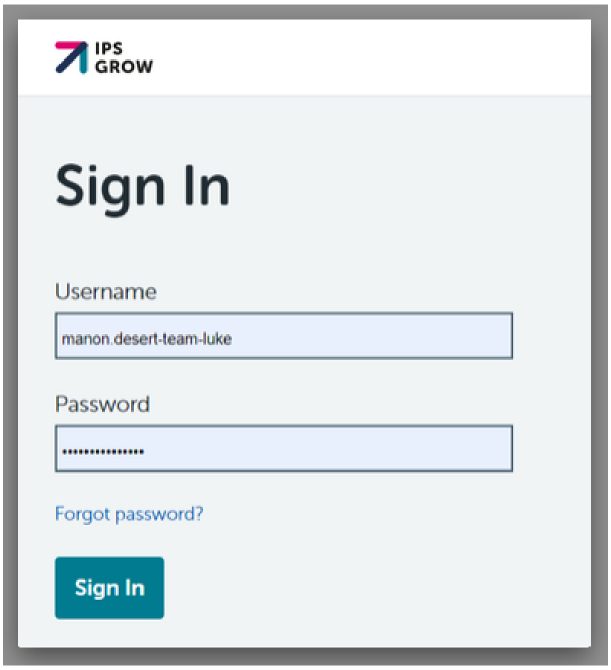
	Team Level	Service Level	Stakeholder Level
Can See:			
Dashboard – Information at an Employment Specialist Level	✓	✗	✗
Dashboard – Information at Team Level	✓	✓	✓ (Level*)
Dashboard - Information at Service Level	✗	✓	✓ (Level*)
Dashboard - NHS England monitoring	✗	✗	✗
Submitted NHS England Quarterly Returns	✗	✓	✗
Help & Resources Section	✓	✓	✓
Can Do:			
Upload spreadsheet(s) to the Dashboard and set targets	✓	✗	✗
Submit and edit NHS England Quarterly Returns	✗	✓	✗

*Providers can decide whether to set their external stakeholders up at a team or service level

	STP Level	Regional Level	National Level
Can See:			
Dashboard – Information at an Employment Specialist Level	✗	✗	✗
Dashboard – Information at Team Level	✗	✗	✗
Dashboard - Information at Service Level	✗	✗	✗
Dashboard - NHS England monitoring	✓	✓	✓
Submitted NHS England Quarterly Returns	✓	✓	✓
Help & Resources Section	✓	✓	✓
Can Do:			
Upload spreadsheet(s) to the Dashboard and set targets	✗	✗	✗
Submit and edit NHS England Quarterly Returns	✗	✗	✗

Logging in

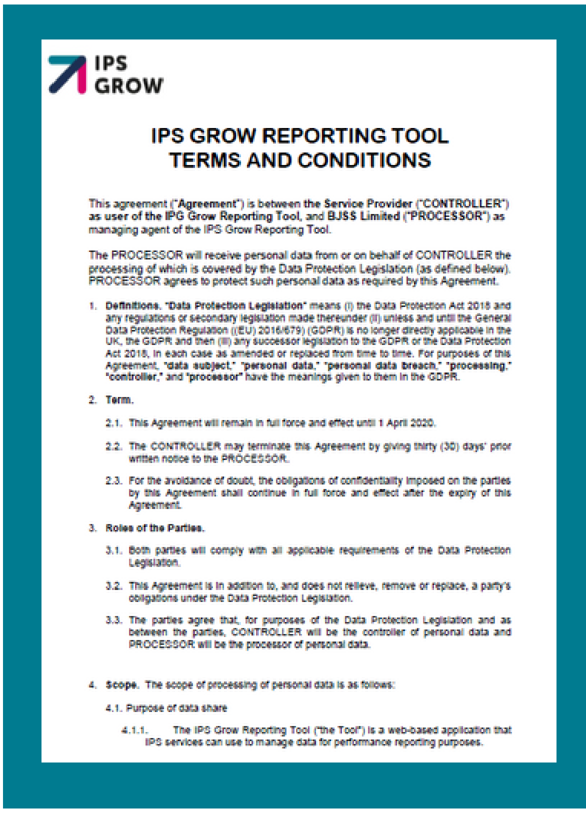
Once you have signed up to use the reporting tool, you will receive an email with instructions on how to login, set your password and access the tool. You should receive this email within a week of signing up. If you have any trouble with logging in, please contact IPS.Support@bjss.com



Information Governance

If you are an IPS provider logging in to the Reporting Tool for the first time, you will need to accept the Terms and Conditions before your organisation can access the tool. The Terms and Conditions explain how the tool reads your spreadsheets and set out a data processing agreement with BJSS, our technology partners who host the tool.

- If you have a Service Level account you will need to accept the Terms and Conditions on behalf of your organisation. The Terms and Conditions will appear on the screen when you first log in.
- If you have a Team Level account you will need to wait until the Terms and Conditions have been accepted before you can access the tool.



IPS GROW

IPS GROW REPORTING TOOL
TERMS AND CONDITIONS

This agreement ("**Agreement**") is between the **Service Provider** ("CONTROLLER") **as user of the IPG Grow Reporting Tool**, and **BJSS Limited** ("PROCESSOR") as managing agent of the IPS Grow Reporting Tool.

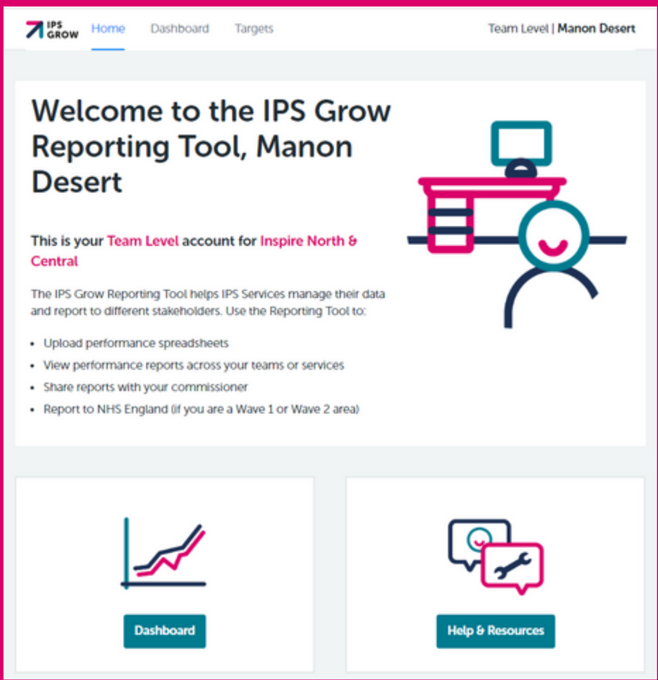
The PROCESSOR will receive personal data from or on behalf of CONTROLLER the processing of which is covered by the Data Protection Legislation (as defined below). PROCESSOR agrees to protect such personal data as required by this Agreement.

1. **Definitions.** "**Data Protection Legislation**" means (i) the Data Protection Act 2018 and any regulations or secondary legislation made thereunder (ii) unless and until the General Data Protection Regulation ((EU) 2016/679) (GDPR) is no longer directly applicable in the UK, the GDPR and then (iii) any successor legislation to the GDPR or the Data Protection Act 2018, in each case as amended or replaced from time to time. For purposes of this Agreement, "**data subject**," "**personal data**," "**personal data breach**," "**processing**," "**controller**," and "**processor**" have the meanings given to them in the GDPR.
2. **Term.**
   - 2.1. This Agreement will remain in full force and effect until 1 April 2020.
   - 2.2. The CONTROLLER may terminate this Agreement by giving thirty (30) days' prior written notice to the PROCESSOR.
   - 2.3. For the avoidance of doubt, the obligations of confidentiality imposed on the parties by this Agreement shall continue in full force and effect after the expiry of this Agreement.
3. **Roles of the Parties.**
   - 3.1. Both parties will comply with all applicable requirements of the Data Protection Legislation.
   - 3.2. This Agreement is in addition to, and does not relieve, remove or replace, a party's obligations under the Data Protection Legislation.
   - 3.3. The parties agree that, for purposes of the Data Protection Legislation and as between the parties, CONTROLLER will be the controller of personal data and PROCESSOR will be the processor of personal data.
4. **Scope.** The scope of processing of personal data is as follows:
   - 4.1. Purpose of data share
     - 4.1.1. The IPS Grow Reporting Tool ("the Tool") is a web-based application that IPS services can use to manage data for performance reporting purposes.

Logging in

When you log in you will be welcomed by the Homepage. Depending on your role you will see one of the displays below:

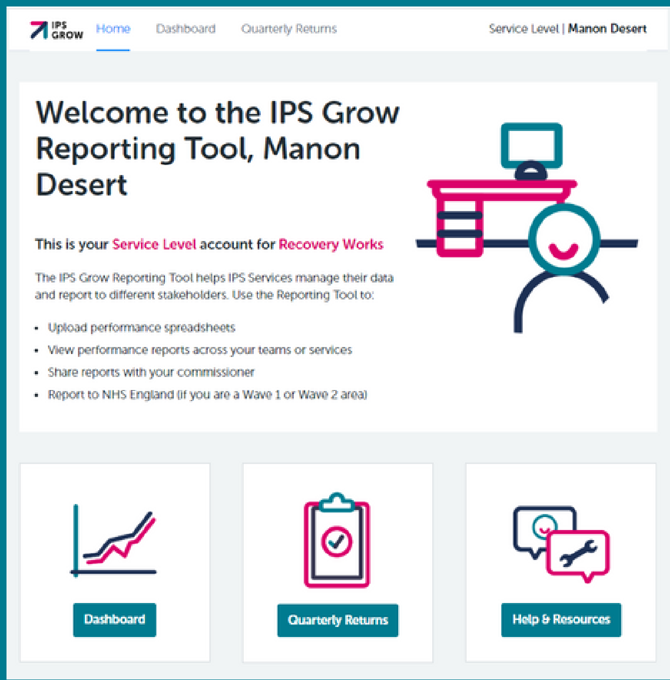
Homepage Display: A



Display A is for: Team Level and Stakeholder Level accounts.

Here you will see two options; the **Dashboard** and **Help & Resources**

Homepage Display: B



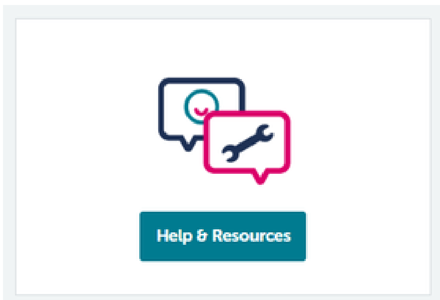
Display B is for: Service Level, STP, Regional and National Level accounts.

Here you will see three options; the **Dashboard, Quarterly Reports** and **Help & Resources**

Help & Resources

If you click on 'Help & Resources' you will be directed to the FAQs and User Guides on the IPS Grow website.

These will open in the same window taking you away from the Tool, so we'd advise you to right click on Help & Resources and click 'open in new window' so you are not redirected away from the Tool.



How to sign out?

Simple hover on your name at the right hand column of the window and click 'sign out' button.

Team Level User Guide

2

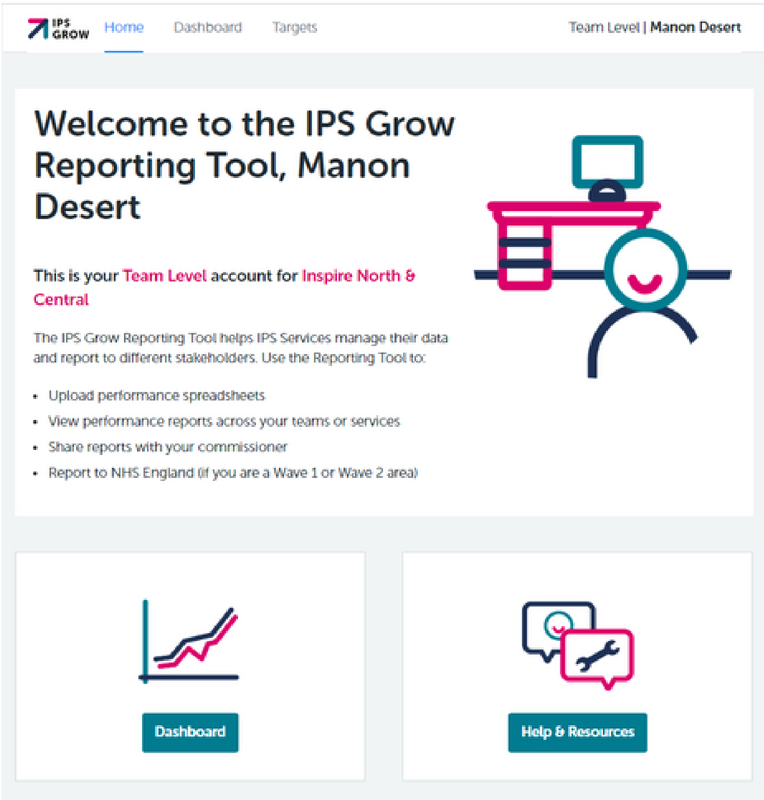
Team Level - User Guide

Tool Features at Team Level

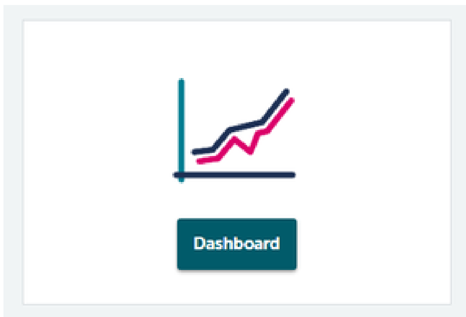
At a Team Level you will be able to:

- upload spreadsheets completed by the Employment Specialists within your team
- view performance reports across your team and over time
- set targets for your team

When you first log in you will be welcomed by the Homepage:



First, we will look at the Dashboard, so click on the 'Dashboard' button



The data and analysis on your Dashboard differs to that of any other user. The dashboard for a Team Leader contains more information, including specific data relating to individual Employment Specialists. For example, if you choose to share your dashboard with an external stakeholder (e.g. a commissioner), they will not be able to see any of your employment specialist information.

Team Level Dashboard

Team Level - Dashboard

What to expect to view within the Dashboard:

You have the option to view the following accross your entire team, or to 'drill down' to view data by Employment Specialist

Quarter Overview / Year to Date

Service performance statistics - presented in a table
Service quality statistics - presented in a table

Caseload

A graph showing a snapshot of the number of cases held by each Employment Specialist

Performance Breakdown

Monthly breakdown of service performance - presented in charts
Quarterly breakdown of performance by Employment Specialist - presented in charts

Demographics

Overview of client information - presented in charts

To view the performance for different quarters simply change the 'Reporting Period' in the dropdown box at the top of the Dashboard (see figure 1). Selecting the Fiscal Year itself will allow you to view the cumulative performance of all quarters to date.

To view the performance for a specific Employment Specialist in a Reporting Period change the 'Employment Specialist' in the dropdown (see figure 2). They will be listed by their initials.

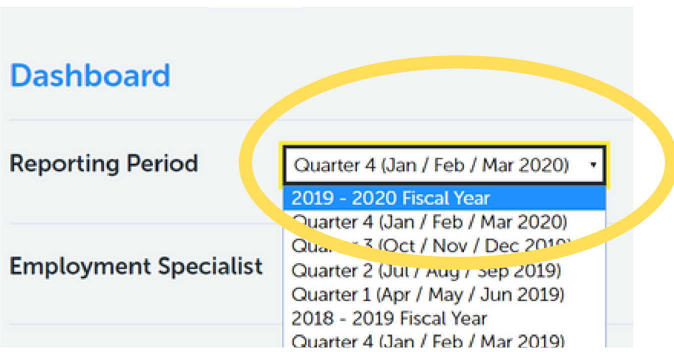


Fig 1

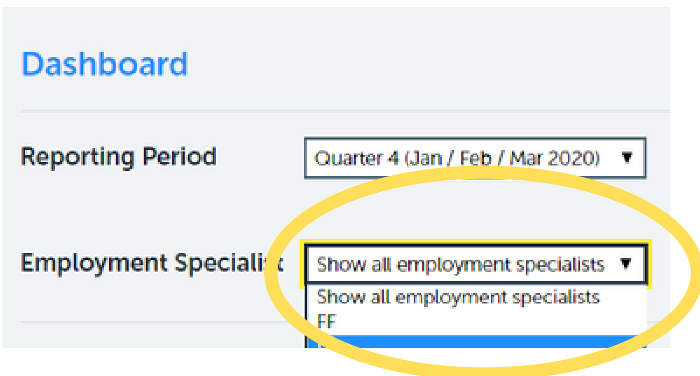


Fig 2

Team Level - Quarter Overview

The first segment of the dashboard displays service performance and service quality statistics. These are presented in a table labelled **'Quarter Overview'**. Before inputting spreadsheet data, the table will be empty. Figure 3 below represents a Quarter Overview with sample data.

Clicking on the arrows next to an item shows you more information on the metric.

The "Quarter total" column shows your team's performance data for the quarter. When you upload a spreadsheet into the tool, the Value column will be auto-populated with your data.

Service performance	Quarter total	Target
▼ Number of referrals to the service The referral date is defined as the date the referral was received by the employment specialist and accepted onto their caseload.	-	50
▶ Number of referrals where the client is already in employment	-	8
▶ Number of clients who have started a vocational profile	-	25
▶ Number of clients supported into work	-	13
▶ Total number of job starts	-	-
▶ Number of clients still in work 13 weeks after they started a job	5	5
▶ Number of clients still in work 26 weeks after they started a job	7	3

The "Target" column shows your team's target for the quarter. Not all items will have targets.

Only users at a team level can add/edit Service Performance targets. Find out how to do this on page X.

Service quality	Quarter total	Target
Average number of days from starting the vocational profile to face to face contact with an employer	30 days	30 days
Average number of days from referral to first attempted contact by an Employment Specialist	-	5 days
Average number of days from referral to starting the vocational profile	-	10 days
Average number of days from a client starting their vocational profile to their first job start	-	-
Number of clients discharged from the service	-	-

The Service Quality Targets are pre-set based on IPS fidelity metrics. Some values are blank where targets are not relevant.

Fig 3

Team Level - Caseload

The next segment of the dashboard is a chart showing the number of clients on the caseloads held by each Employment Specialist. The coloured blocks represent different types of case. If your data describes cases as anything other than what is shown, they are counted as 'Other' in this chart.

Figure 4 shows the Caseload Chart with example data entered (each Employment Specialist is labelled with their initials).
Clicking on the case type icon will hide those types of cases from appearing in the chart.

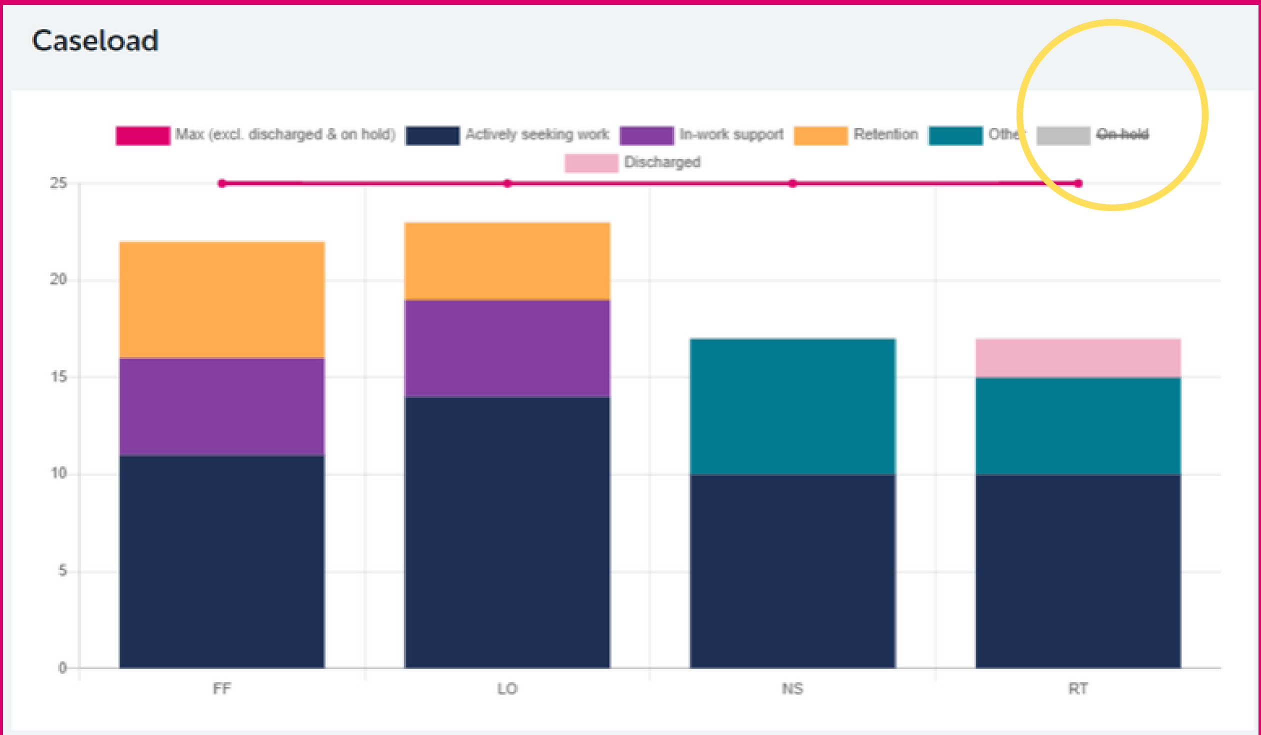


Fig 4

Please Note:

This is a snapshot of the current number of clients who have started a vocational profile and have not been discharged from the service. It reads off the "Date Vocational Profile started" and the "Discharge date" on your spreadsheet.

Discharged cases will continue to appear as ‘discharged’ in this chart until you have submitted discharge dates. Once a date has been submitted it no longer appears in the caseload.

Team Level - Performance Breakdown

The next section of the Dashboard provides a performance breakdown for your service.

The graphs on the left show a **monthly breakdown** of the team's performance **as a whole**.

The graphs on the right show a **quarterly breakdown** of the team's performance **by Employment Specialist**.

This column is a visual representation of:

- The number of referrals to the service by month
- The number of clients starting a vocational profile by month
- The number of clients supported into work by month
- The number of clients who achieved a 13 week job sustainment by month
- The number of clients who achieved a 26 week job sustainment by month

This column is a visual representation of:

- The number of referrals recorded per employment specialist for the quarter
- The number of clients who have started a vocational profile with an Employment Specialist in the quarter
- The number of clients supported into work by each Employment Specialist in the quarter (‘Job Starts’)
- The number of clients who achieved a 13 week job sustainment in the quarter, by Employment Specialist
- The number of clients who achieved a 26 week job sustainment, by Employment Specialist

The pink line represents the monthly target taken as annual target divided by 12.

Fig 5

Team Level - Demographics

The final segment of the Dashboard relates to demographics.

Information on clients' Age, Gender, Ethnicity, Work Related Benefits are presented in graphs as a snapshot of the current caseload. Figure 6 below demonstrates some example data:

Fig 6

Please Note: Even if you submit a file for previous quarters, the demographics listed will only aggregate the current caseload for the quarter you are reviewing.

Top Tip..

Hover the mouse over charts to view full information on the data point

Team Level - Setting Targets

The right hand column of the Quarter Overview in the Dashboard provides the option to show targets. Only you as the Team Leader can add/edit these targets.

Quarter Overview

Service performance	Quarter total	Target
▶ Number of referrals to the service	-	50
▶ Number of referrals where the client is already in employment	-	8
▶ Number of clients who have started a vocational profile	-	25
▶ Number of clients supported into work	-	13
▶ Total number of job starts	-	-
▶ Number of clients still in work 13 weeks after they started a job	5	5
▶ Number of clients still in work 26 weeks after they started a job	7	3

Fig 7

To add/edit Targets, click on **Targets** at the top of your screen and a window appears where you can set your annual team targets

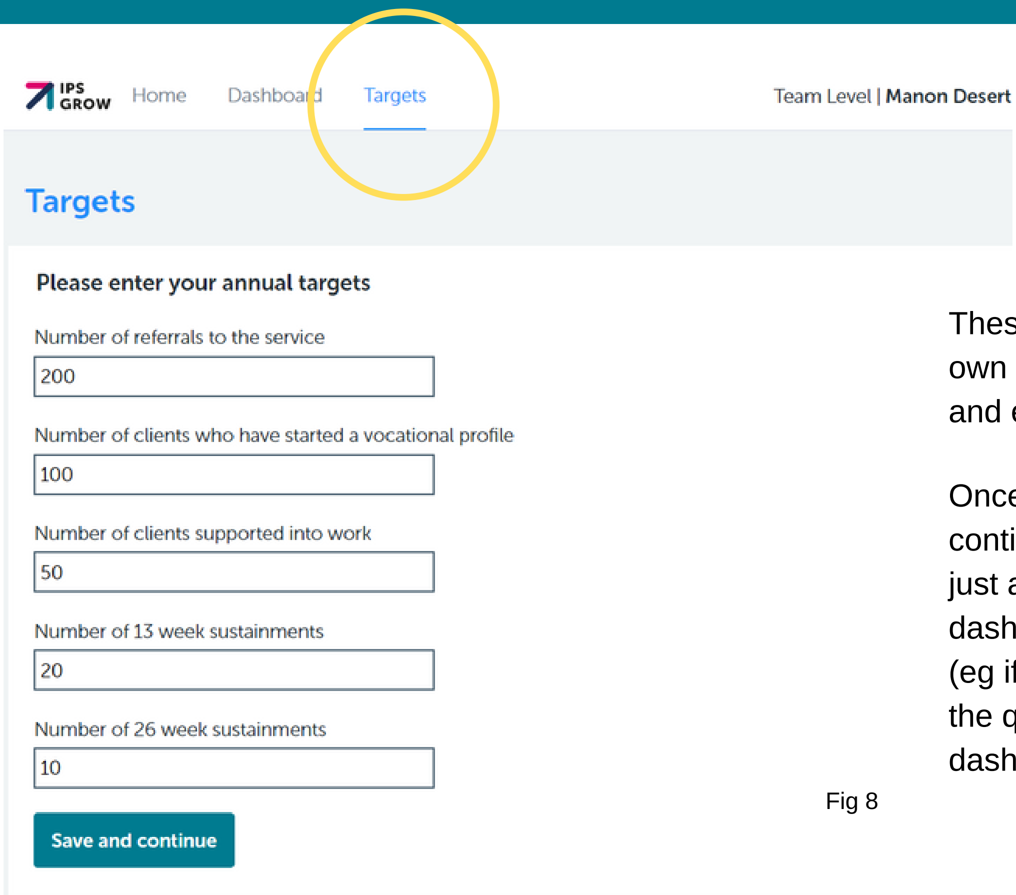


Fig 8

These targets are for your own use, so you can update and edit them as you wish.

Once you click 'save and continue' the annual targets you just added will update on your dashboard as a quarterly target (eg if you input 100 referrals, the quarterly target listed on the dashboard would be 25)

Uploading your Spreadsheet into the Tool

Team Level - Uploading Data to the Tool

To upload data to the tool, go to your Dashboard and select the Reporting Period you want to update from the dropdown. Then click the 'Update Dashboard' (see figure 9)

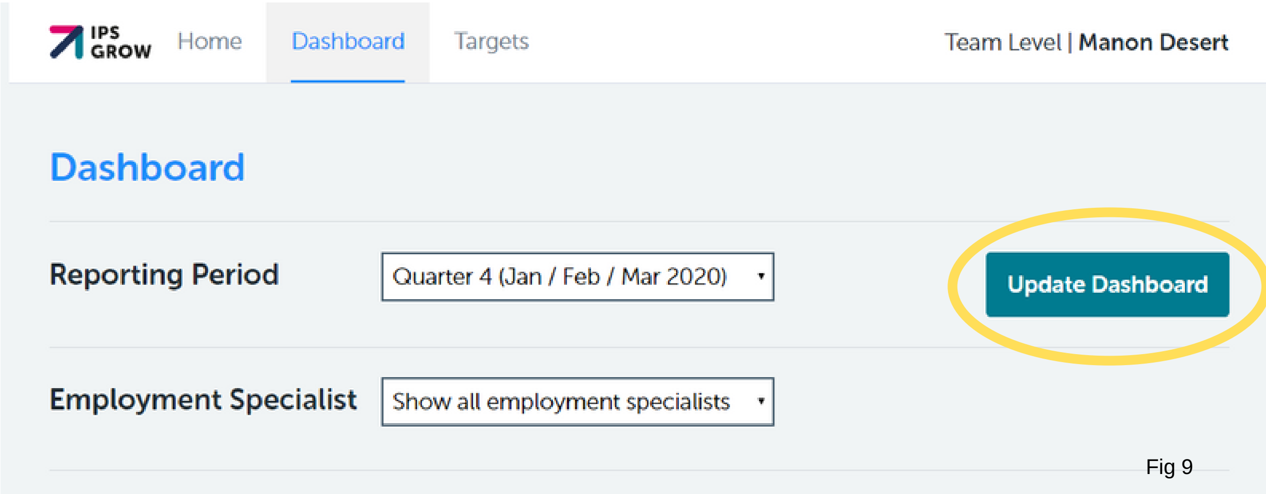


Fig 9

Then choose all the spreadsheet(s) you wish to upload, click 'Open' once they are selected, and then click 'Update'.

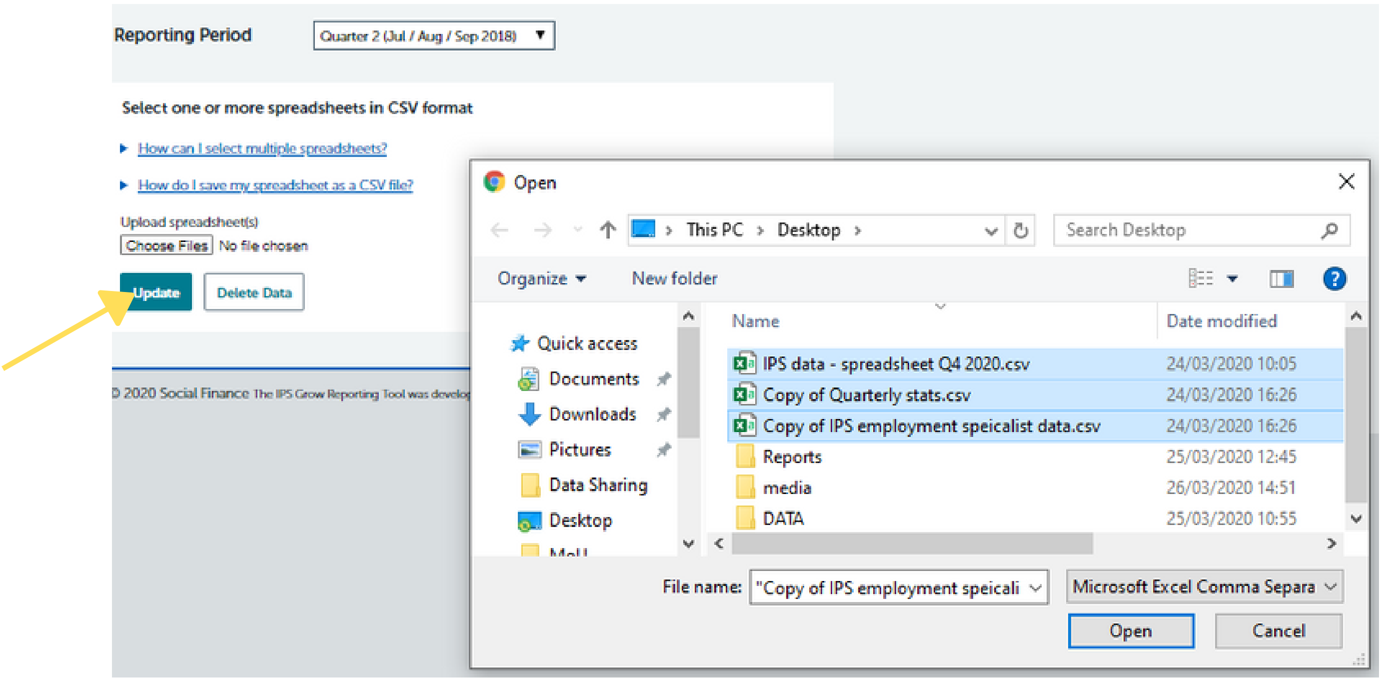


Fig 10

Please Note: The Tool will only read data relevant to the reporting period you have selected. For example, if your file includes Q1, Q2, Q3 and Q4, and you select Q1, only Q1 data will be updated.

Team Level - Uploading Data to the Tool

Please Note: The Tool will only accept the Spreadsheet as a .csv file. The Upload link is designed to search for this file type only to avoid error in uploading files (see figure 11).

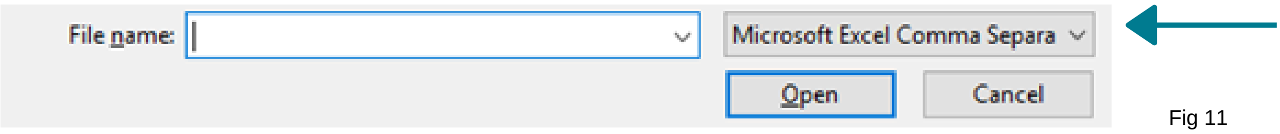


Fig 11

If you do upload the Spreadsheet in the wrong format, you will receive the following error message:

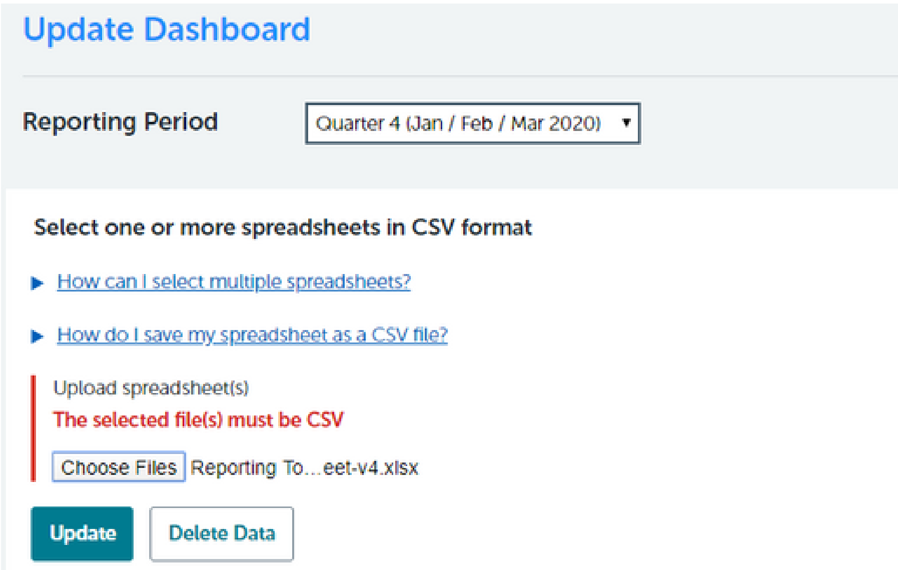


Fig 12

If you receive this error, simply re-save the spreadsheet and select a (*.csv) file as the file type:

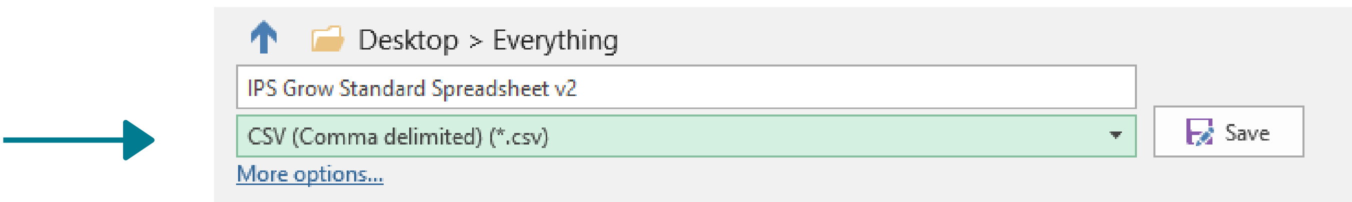


Fig 13

Then re-upload the spreadsheet and click ‘Update’

See page 53 for more detailed guidance on how to save your spreadsheet as a .csv file.

Deleting Data: To delete the data in a quarterly period, simply select the Reporting Period you want to delete from the drop-down menu. Then click 'Delete Data'. You will then be prompted to confirm. If you are sure you want to clear the data in this period click 'Yes, delete data for this reporting period'

Top Tip..

You can upload multiple .csv files at one time and let the Tool aggregate the data for you!

If you are a Team Leader and uploading your standard spreadsheet for the quarter, you can select multiple spreadsheets (one filled out by each ES in your team) and upload this to the Tool, rather than each ES collecting and adding their data onto one Spreadsheet.

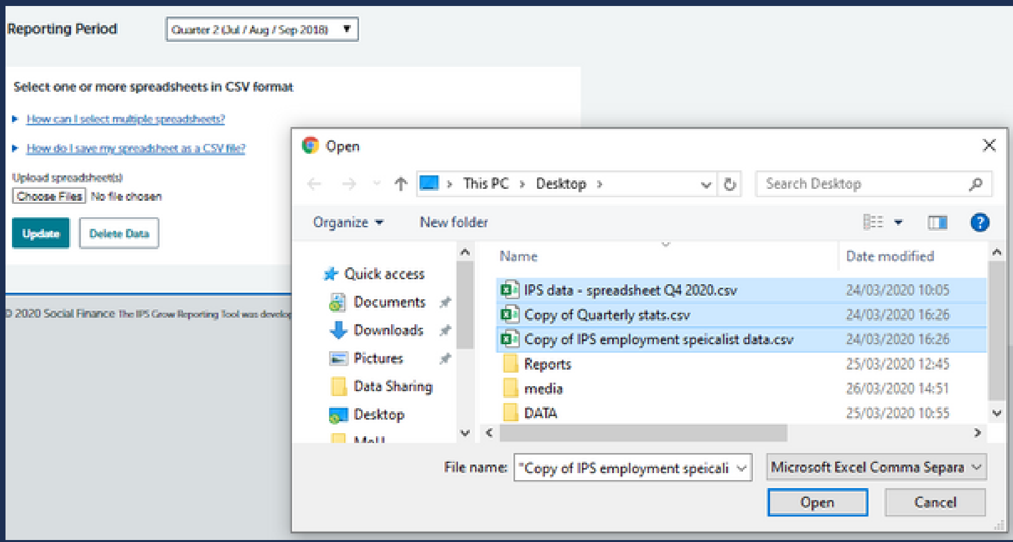


Fig 14

Before you click 'Update' you'll be able to see how many files the Tool is reading:

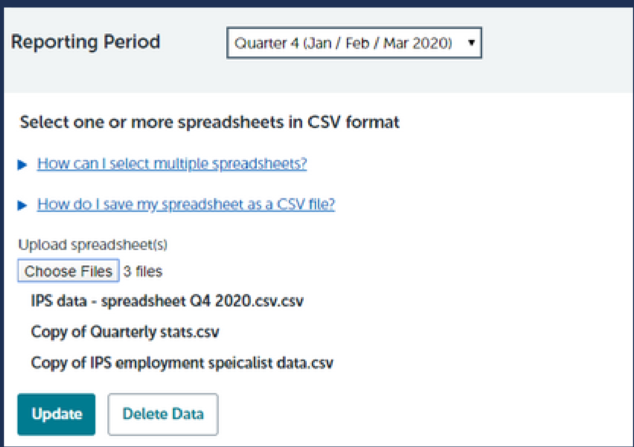


Fig 15

In figure 15, the Tool is reading spreadsheets from 3 Employment Specialists within the team – and the tool shows all 3 file names that have been selected.

Alternatively, in figure 16 you can see what happens if the Employment Specialists are all using and updating a single spreadsheet. You should see the file name of this one spreadsheet (it may appear trunkated as shown).

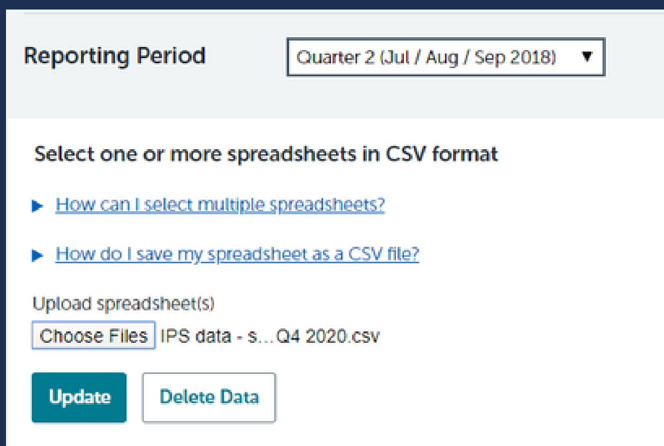


Fig 16

Please Note..

You need to submit all files together in the one upload (as per figure 15). If you submit multiple times, you will overwrite what you previously submitted.

Team Level - Uploading Data to the Tool

Once you click the ‘Update’ button, the tool will process your data and you will be taken back to the dashboard view of the quarter that you were editing with the following screen:

Fig 17

Did you receive an error message?
See page 55

That's it!

The Reporting Period that you selected has been updated.

You can now view performance reports across your team and share reports with others.

More Top Tips..

You can submit a spreadsheet part way through the current quarter. The Tool will populate the data with as much information as currently available, and you can update the file with additional data whenever you want.

If you've made a mistake or uploaded the wrong spreadsheet, you can edit data at any point. Simply upload a spreadsheet for any reporting period and the tool will overwrite previous data that was stored there.

You cannot download your dashboard, however you can take a screenshot of the content which may be useful for performance reviews.

Only users within your organisation with Service Level accounts will automatically be able to see your team's dashboard, and performance by employment specialist. No other users will be able to view your individual team's data. However you might want to set up your commissioner or Mental Health Trust with a stakeholder account so they can see a summary of your dashboard.

Service Level User Guide

3

Service Level - User Guide

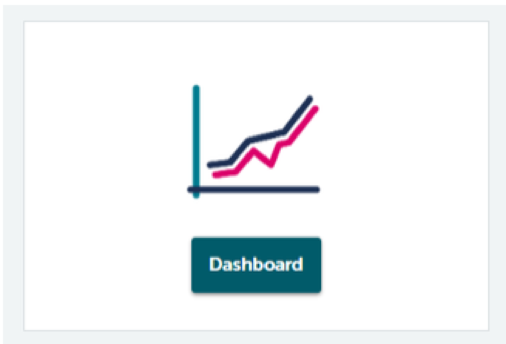
Tool Features at Service Level

With a Service Level account you will be able to:

- view performance dashboards across multiple teams and at an individual team level
- submit quarterly returns to NHS England (see page 32 on how to do this)
- grant team leaders in your organisation access to the Reporting Tool by accepting the Terms and Conditions (see page 7)

When you first log in you will be welcomed by the Homepage:

First, we will look at the Dashboard, so click on the 'Dashboard' button



The data and analysis on your Dashboard differs to that of any other user. The Dashboard for a Service Lead contains the same level of information as Team Leader, but also the option to view the data collectively for your service, or drill down to view data for individual teams.

Service Level - Dashboard

What to expect to view within the Dashboard:

You have the option to view the following accross your entire service, or to 'drill down' to view data for individual teams.

Quarter Overview

Service performance statistics - presented in a table
Service quality statistics - presented in a table

Performance Breakdown

Monthly breakdown of service performance - presented in charts
Quarterly breakdown of performance by Employment Specialist - presented in charts

Demographics

Overview of client information - presented in charts

Dashboard - Quarter Overview

The first segment of the dashboard displays service performance and service quality statistics. These are presented in a table labelled **'Quarter Overview'**.

At a Service Level, you have the option to view information across the service as a whole, or to view each team within your service individually. You can do this by adjusting the 'Team drill down' box, highlighted in yellow:

Team drill down

Please select an option ▼

Quarter Overview

The 'Quarter total' column shows service performance for the quarter so far.

When a spreadsheet is uploaded onto the Tool, this column will be auto populated with the new data.

Clicking on the arrows next to an item shows you more information on the metric.

Service performance	Quarter total	Target
▸ Number of referrals to the service	177	154
▸ Number of referrals where the client is already in employment	-	23
▸ Number of clients who have started a vocational profile	120	98
▸ Number of clients supported into work	37	56
▸ Total number of job starts	28	-
▸ Number of clients still in work 13 weeks after they started a job	37	48
▸ Number of clients still in work 26 weeks after they started a job	15	46

Service Performance targets are set at a Team Level and aggregated up to a service level. Not all items will have targets.

Service quality	Quarter total	Target
Average number of days from starting the vocational profile to face to face contact with an employer	30 days	30 days
Average number of days from referral to first attempted contact by an Employment Specialist	5 days	5 days
Average number of days from referral to starting the vocational profile	13 days	10 days
Average number of days from a client starting their vocational profile to their first job start	32 days	-
Number of clients discharged from the service	21	-

Service Quality targets are pre-set based on fidelity metrics. Not all items have targets.

Fig 18

Performance Breakdown

The next section of the Dashboard provides a performance breakdown for the service.

The graphs on the left show a **monthly breakdown** of the service's performance **as a whole**.

The graphs on the right show a **quarterly breakdown** of performance across the different teams within your service.

This column is a visual representation of:

- The number of referrals to the service that month
- The number of clients starting a vocational profile by month
- The number of clients supported into work by month
- The number of clients who achieved a 13 week job sustainment in that month
- The number of clients who achieved a 26 week job sustainment by month

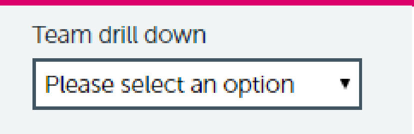
This column is a visual representation of:

- The number of referrals per team for the quarter
- The number of clients who have started a vocational profile per team for the quarter
- The number of clients supported into work per team in that quarter ('Job Starts')
- The number of clients who achieved a 13 week job sustainment in that quarter per team
- The number of clients who achieved a 26 week job sustainment per team

The pink line represents the monthly target taken as annual target divided by 12.

Fig 19

Team Performance Breakdown



If you decide to 'drill down' to view performance for an individual team, the graphs will change to reflect the selected team's performance.

The graphs on the left show a **monthly breakdown** of the team's performance **as a whole**.

The graphs on the right show a **quarterly breakdown** of the team's performance **by Employment Specialist**.

This column is a visual representation of:

- The number of referrals to the service by month
- The number of clients starting a vocational profile by month
- The number of clients supported into work by month
- The number of clients who achieved a 13 week job sustainment by month
- The number of clients who achieved a 26 week job sustainment by month

Fig 20

This column is a visual representation of:

- The number of referrals recorded per Employment Specialist for the quarter
- The number of clients who have started a vocational profile with an Employment Specialist in the quarter
- The number of clients supported into work by each Employment Specialist in the quarter (‘Job Starts’)
- The number of clients who achieved a 13 week job sustainment in the quarter, by Employment Specialist
- The number of clients who achieved a 26 week job sustainment, by Employment Specialist

The pink line represents the monthly target taken as annual target divided by 12.

Demographics

The final section of the dashboard presents information on the employment specialists' client demographics.

Information on clients' Age, Gender, Ethnicity, Work Related Benefits are presented in graphs as a snapshot of the current caseload. Figure 21 below shows some example data:

Fig 21

Please Note:

Even if you are looking at previous quarters, the demographics charts only show infomation for the current caseload.

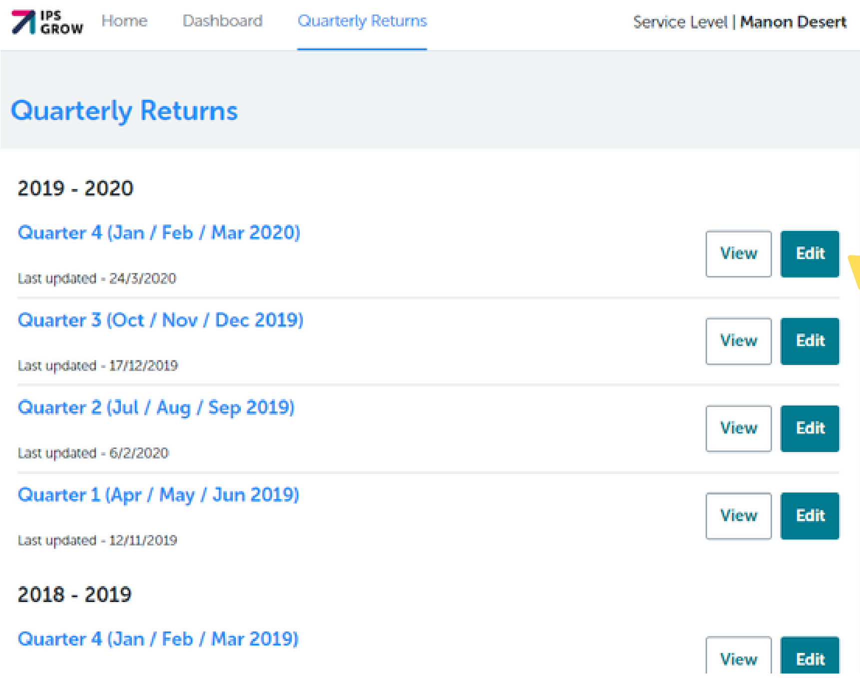
Submitting your Quarterly Returns

Quarterly Returns

Submitting your NHS England Quarterly Returns using the Standard Spreadsheet is easy.

When you log in at Service Level, you will see an icon at the bottom of the screen labelled 'Quarterly Returns' (see fig 22). Click on this and a new window will open (fig 23).

Fig 22



Find the quarter you would like to update and click 'Edit'.

Fig 23

Please Note: There are 5 steps to the Quarterly Returns. You will now be taken through these steps.

Quarterly Returns

To Upload A Spreadsheet for Step 1

Click 'Upload Spreadsheet' (see fig 24) and a new window will appear (fig 25) where you will have the option to upload one or more spreadsheet(s) of data as long as they are in the standard format (download Standard Spreadsheet) and saved as a .csv file.

Fig 24

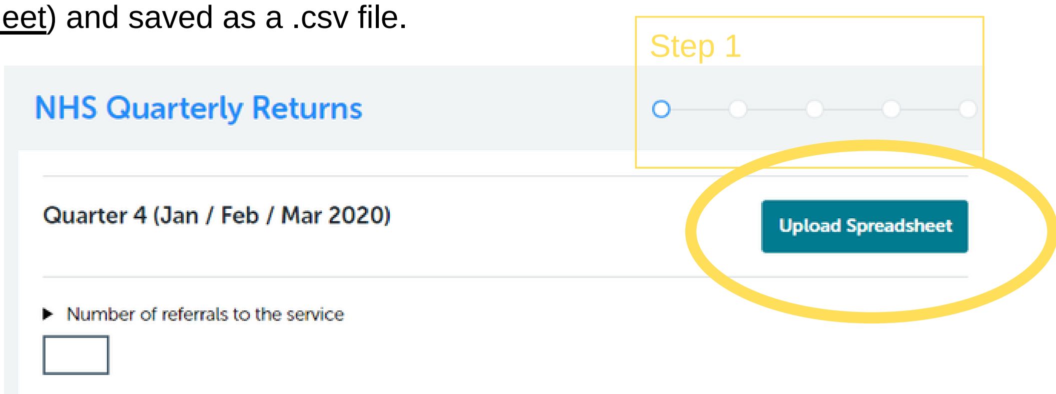
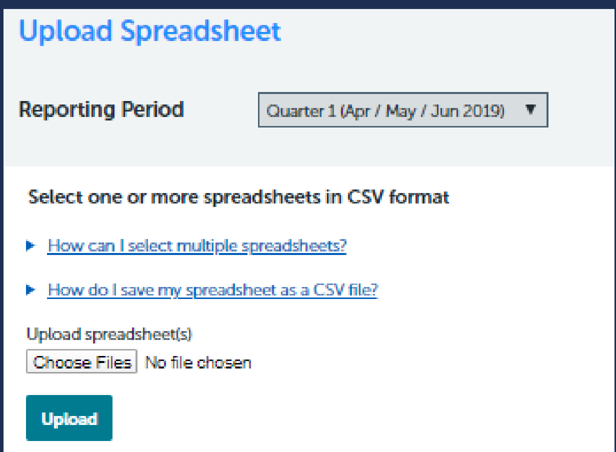


Fig 25



See pages 19 - 21 for further guidance on uploading spreadsheet(s).

This will auto populate the first part of the Quarterly Return (see fig 26).

Clicking on the arrows next to an item shows you more information on the metric.

If the values don't look right to you, you can edit them by entering the correct values into the boxes.

Once you are happy, press 'Next' to fill out the rest of the return.

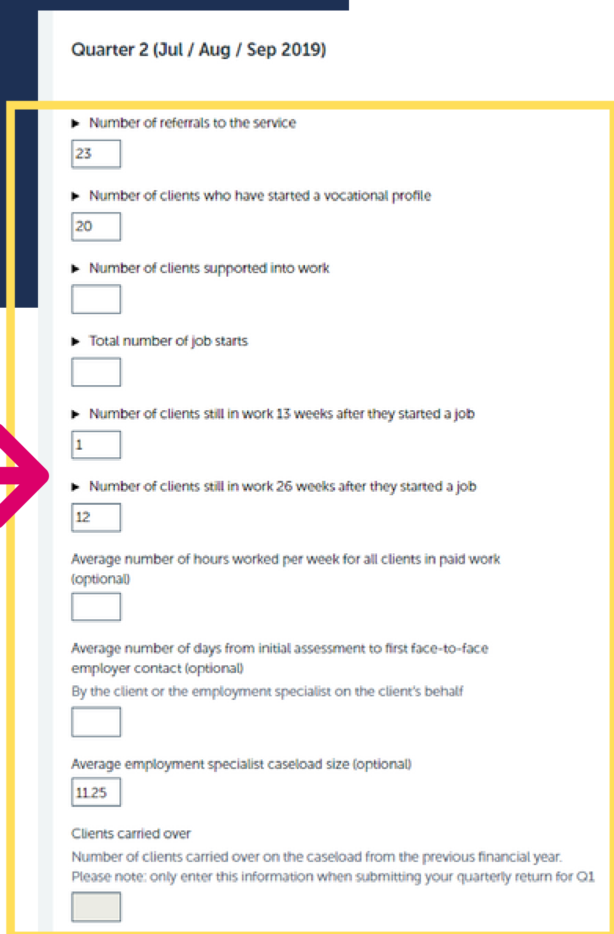


Fig 26

Quarterly Returns

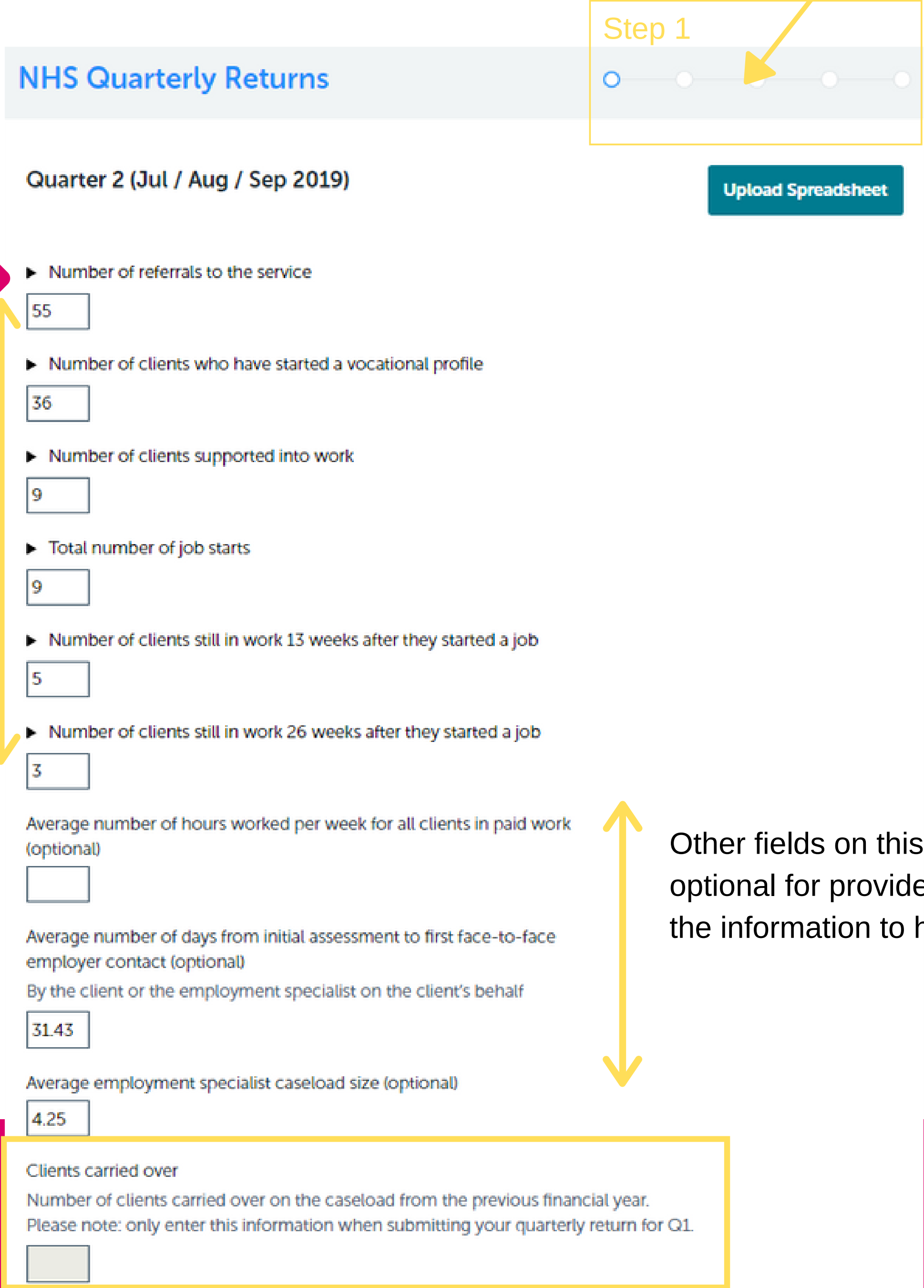
Step 1: Option 2

To Manually Enter Data for Step 1

Enter the performance from the quarter into the text boxes.

Here you can see how far through the Quarterly Returns you are. As you progress through the windows, the dot will move.

Clicking on the arrows next to an item shows you more information on the metric.



Step 1

NHS Quarterly Returns

Quarter 2 (Jul / Aug / Sep 2019)

Upload Spreadsheet

▸ Number of referrals to the service

55

▸ Number of clients who have started a vocational profile

36

▸ Number of clients supported into work

9

▸ Total number of job starts

9

▸ Number of clients still in work 13 weeks after they started a job

5

▸ Number of clients still in work 26 weeks after they started a job

3

Average number of hours worked per week for all clients in paid work (optional)

Average number of days from initial assessment to first face-to-face employer contact (optional)
By the client or the employment specialist on the client's behalf

31.43

Average employment specialist caseload size (optional)

4.25

Clients carried over
Number of clients carried over on the caseload from the previous financial year.
Please note: only enter this information when submitting your quarterly return for Q1.

The main reporting metrics relate to boxes 1-6 (referrals, vocational profiles, clients supported into work, job starts, 13 and 26 week sustainments).

Other fields on this page are optional for providers who have the information to hand.

Top Tip..

To be able to calculate the number of clients supported in a year (a key performance metric for NHS England) you will need to enter the number of clients "carried over" from the previous financial year.

These are clients who are engaged with the service and still receiving support, but were referred before the current financial year. This is essentially the existing caseload at 31 March.

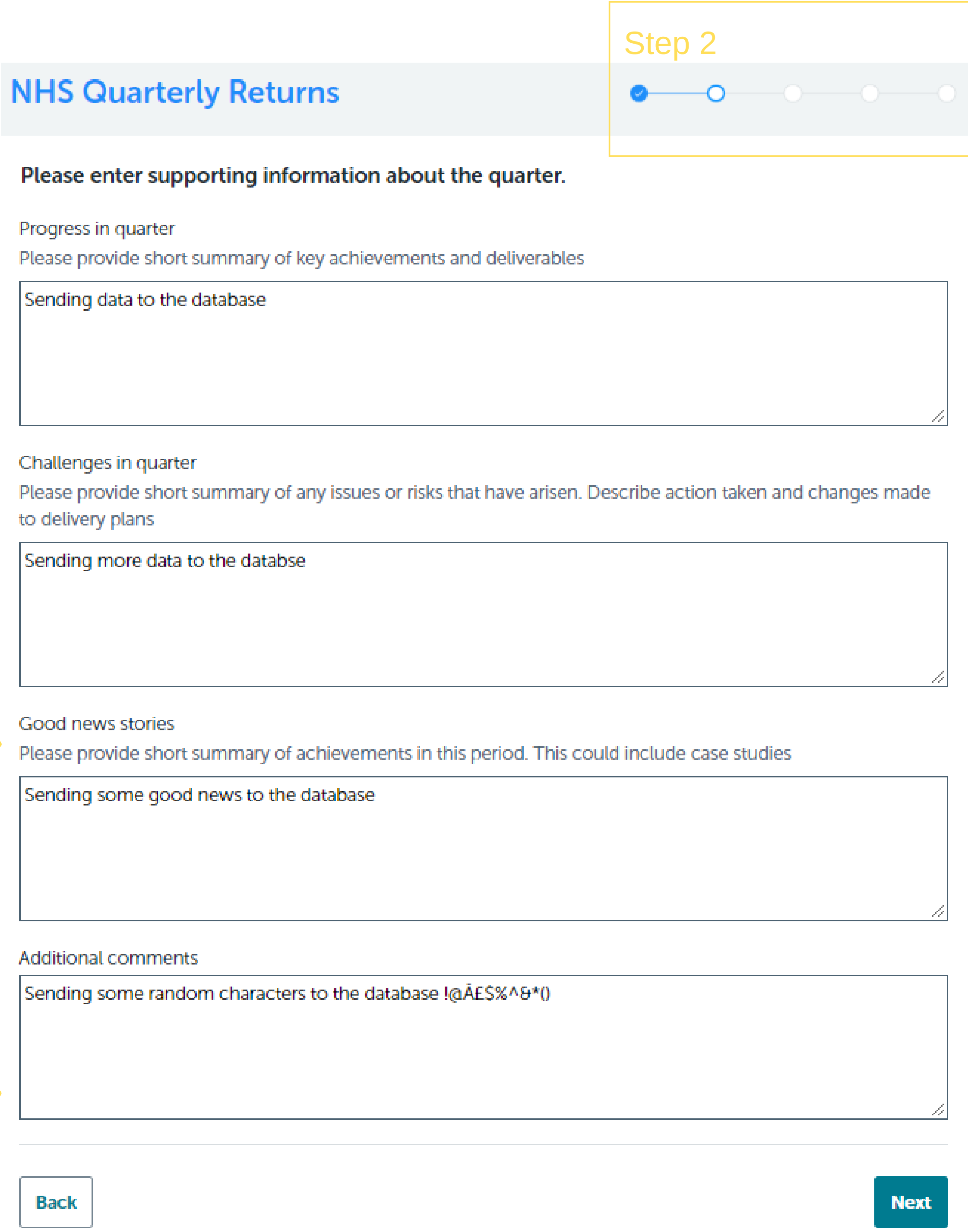
This information only needs to be submitted once, for the July submission.

Quarterly Returns

Step 2

The next section of the quarterly returns allows you to record narrative information about progress and challenges encountered in the quarter.

Fig 27


Step 2

NHS Quarterly Returns

Please enter supporting information about the quarter.

Progress in quarter
Please provide short summary of key achievements and deliverables

Sending data to the database

Challenges in quarter
Please provide short summary of any issues or risks that have arisen. Describe action taken and changes made to delivery plans

Sending more data to the databse

Good news stories
Please provide short summary of achievements in this period. This could include case studies

Sending some good news to the database

Additional comments

Sending some random characters to the database !@Å£$%^&*()

Back

Next

This section contains text boxes for good news stories and additional comments

Once you are happy, press 'Next' to fill out the rest of the return.

Quarterly Returns

Step 3

The third section of the quarterly returns refers to workforce and recruitment. This section asks for the number of team leads, employment specialists, other staff and vacanices you have at the end of the quarter.

Step 3

Fig 28

NHS Quarterly Returns

Please describe your current workforce using the fields below

Number of Employment Specialists (Full Time Equivalent)

33

Total Transformation Funded Employment Specialists (FTE)

33

Number of Team Leads (FTE)

29

Total Transformation Funded Team Leads (FTE)

10

Number of Other Posts (FTE)

29

Transformation Funded Other posts (FTE)

42

Number of Vacancies (FTE)

38

Transformation Funded Vacancies (FTE)

7

This text box allows you to provide a recruitment update, if needed.

Recruitment update

Please provide details of recruitment plans for any vacant posts

Sending even more data to the databse

Back

Once you are happy, press 'Next' to fill out the rest of the return.

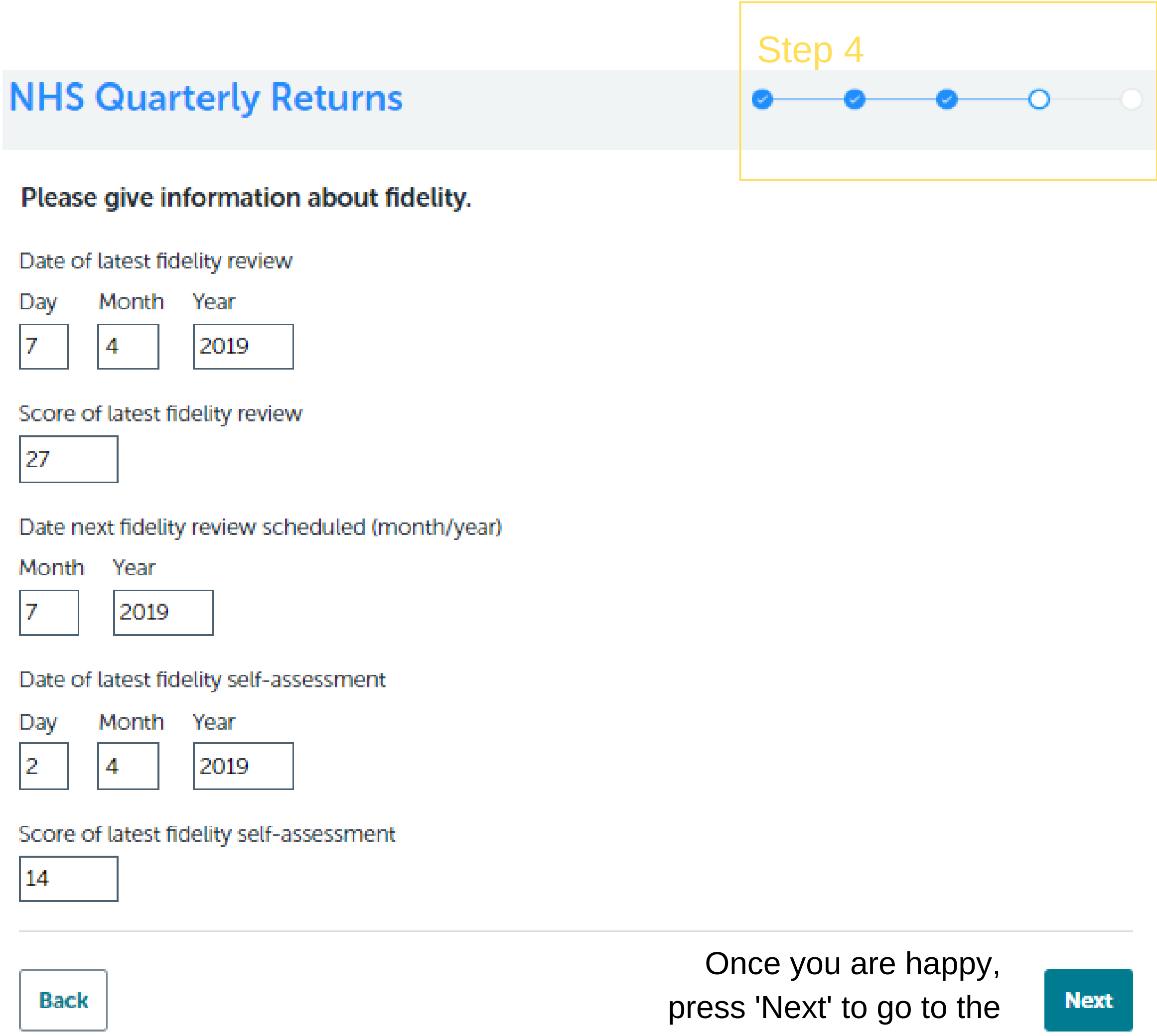
Next

Quarterly Returns

Step 4

The fourth section of the quarterly returns asks you for information on your latest and upcoming fidelity reviews.

Fig 29



Once you are happy, press 'Next' to go to the final step.

Top Tip..

A **fidelity review** on the Reporting Tool is defined as a formal, external fidelity review conducted by a trained organisation such as the Centre for Mental Health or IPS Grow.

A **fidelity self-assessment** refers to an internal review, or a peer review (for example, this may be by a Team Leader or another IPS Provider).

Quarterly Returns

Step 5

The fifth and final section of the quarterly return allows you to review and edit your information

Fig 30

Step 5

NHS Quarterly Returns

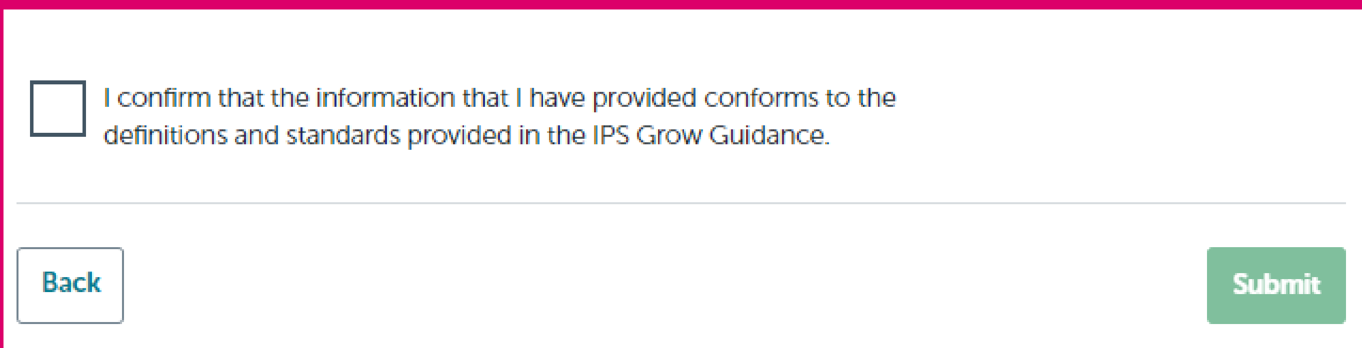
Quarterly Return - Quarter 2 (Jul / Aug / Sep 2018)

Quantitative Information Edit

Service Performance	Quarter Total
Number of referrals to the service	10
Number of clients who have started a vocational profile	35
Number of clients supported into work	14
Total number of job starts	-
Number of clients still in work 13 weeks after they started a job	19
Number of clients still in work 26 weeks after they started a job	12
Average number of hours worked for all clients in paid work	29
Average number of days from starting the vocational profile to first face to face contact with an employer	11

At the bottom of this summary section, you will be asked to confirm that you have followed the IPS Grow Guidance before you can submit the quarterly return. This document is the user guide. The full guidance document for the IPS Grow Standard Spreadsheet (which includes detailed datapoint definitions) can be found here.

Fig 31



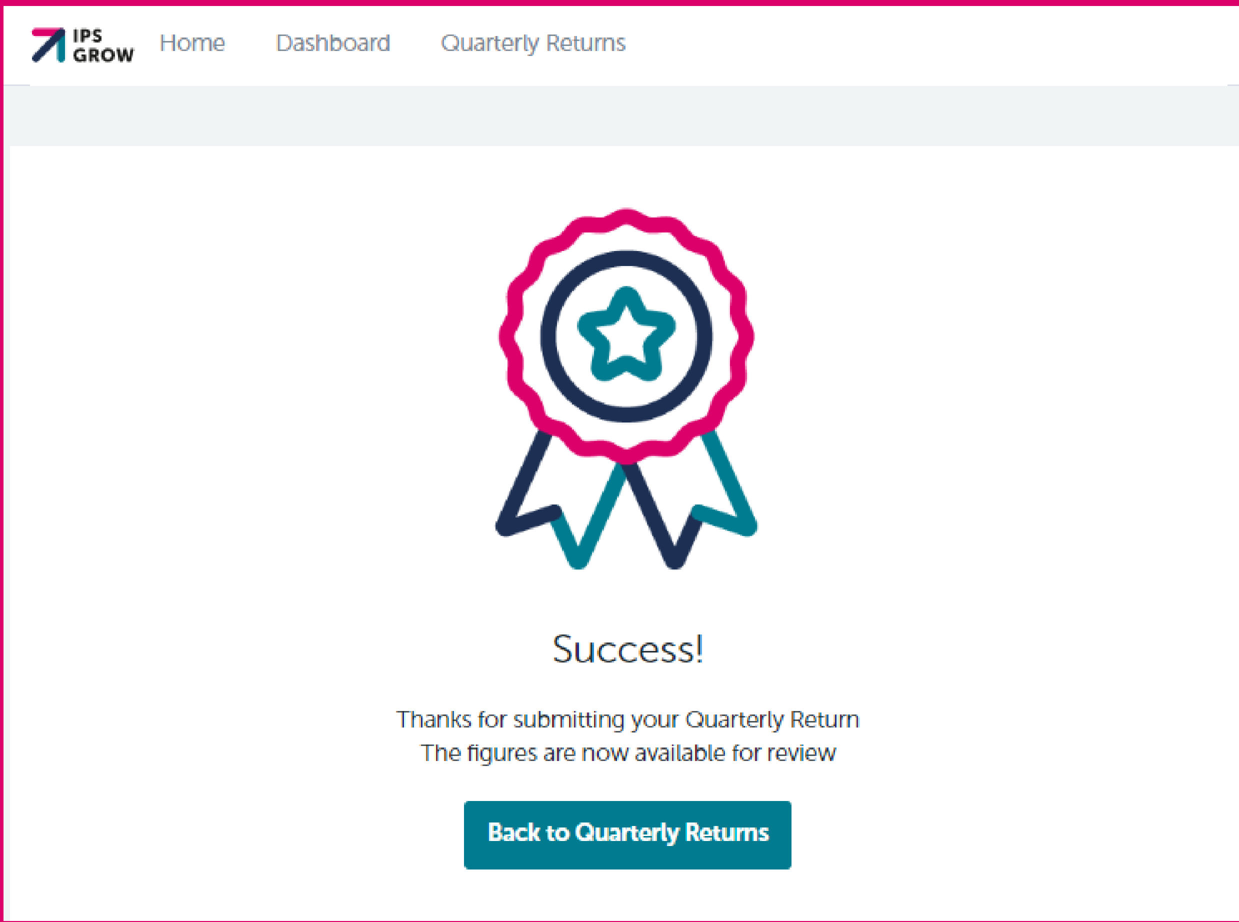
I confirm that the information that I have provided conforms to the definitions and standards provided in the IPS Grow Guidance.

Back

Submit

Quarterly Returns

That's it!



Once submitted, your quarterly return will be viewable at an STP, Regional and National level to users who are logged on in your area.

Top Tip..

You can return to edit a quarterly return at any time, even after it has been submitted.

More Top Tips..

Stick to the timelines for submission of your quarterly reports. Other users at STP, Regional and National level will also be following these timelines:

IPS Reporting Timeframes				
	Wave 1 services to submit quarterly return for review by STP lead	STP lead review and send to NHS England regional lead	NHS England regional lead to review and send to NHS England Policy & Performance teams	NHS England Performance team to produce quarterly report
Quarter 1 (2019/20)	By 19th July 2019	By 2nd August 2019	By 9th August 2019	By 23rd August 2019
Quarter 2 (2019/20)	By 18th October 2019	By 1st November 2019	By 8th November 2019	By 22nd November 2019
Quarter 3 (2019/20)	By 24th January 2020	By 7th February 2020	By 14th February 2020	By 28th February 2020
Quarter 4 (2019/20)	By 17th April 2020	By 1st May 2020	By 8th May 2020	By 22nd May 2020

Fig 31

You cannot download your quarterly returns, however you can take a screenshot of the summary page if you need to share it outside the reporting tool.

You cannot save your quarterly returns as you go so either keep a record offline or submit and return to edit it when you have more information.

Set up your commissioner, Mental Health Trust or other partners with a stakeholder account so they can see a summary of your dashboard. You can choose whether they see summary information of an individual team, or of your entire service.

Stakeholder Level User Guide

4

Stakeholder Level - Dashboard

When you log in, the homepage will appear as Homepage Display A (see page 8).

As a Stakeholder you are simply viewing the Dashboard, there is no option to add, edit or comment on the data.

What to expect to view within the Dashboard:

Quarter Overview

Service performance statistics - presented in a table
Service quality statistics - presented in a table

Performance Breakdown

Monthly breakdown of service performance - presented in charts

Caseload

An graph showing a snapshot of the number of cases held by each Employment Specialist

Demographics

Overview of client information - presented in charts

You can view performance for different quarters by changing the 'Reporting Period' in the dropdown box at the top of the Dashboard (see figure 32).

Clicking on the Fiscal Year will show you the cummulative values for the year to date.

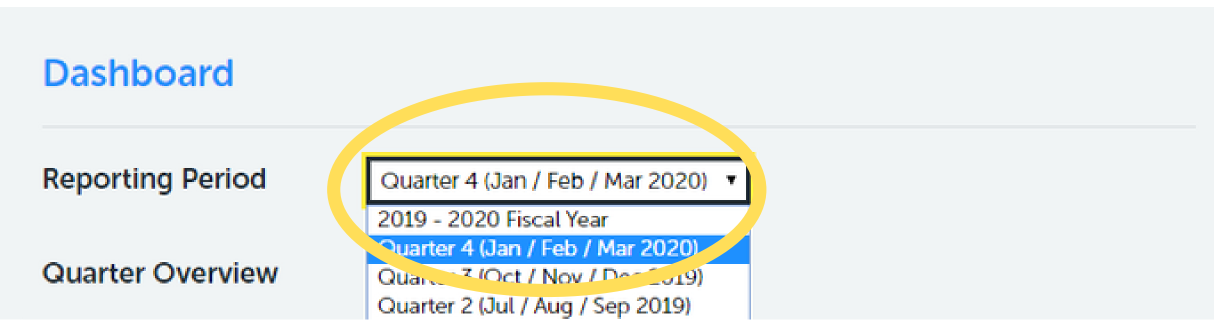


Fig 32

Stakeholder Level - Quarter Overview

The first segment of the dashboard displays service performance and service quality statistics. These are presented in a table labelled **'Quarter Overview'**. Before inputting spreadsheet data, the table will be empty. Figure 33 below represents a Quarter Overview with sample data.

Clicking on the arrows next to an item shows you more information on the metric.

The "Quarter total" column shows your team's performance data for the quarter. When you upload a spreadsheet into the tool, the Value column will be auto-populated with your data.

Service performance	Quarter total	Target
▼ Number of referrals to the service	-	50
▶ Number of referrals where the client is already in employment	-	8
▶ Number of clients who have started a vocational profile	-	25
▶ Number of clients supported into work	-	13
▶ Total number of job starts	-	-
▶ Number of clients still in work 13 weeks after they started a job	5	5
▶ Number of clients still in work 26 weeks after they started a job	7	3

The referral date is defined as the date the referral was received by the employment specialist and accepted onto their caseload.

Service quality	Quarter total	Target
Average number of days from starting the vocational profile to face to face contact with an employer	30 days	30 days
Average number of days from referral to first attempted contact by an Employment Specialist	-	5 days
Average number of days from referral to starting the vocational profile	-	10 days
Average number of days from a client starting their vocational profile to their first job start	-	-
Number of clients discharged from the service	-	-

The "Target" column shows your team's target for the quarter. There is not normally a target for total number of job starts so this is blank. Only users at a team level can add/edit Service Performance targets. Find out how to do this on page X.

The Service Quality Targets are pre-set based on IPS fidelity metrics. Some values are blank where targets are not relevant.

Fig 33

Stakeholder Level - Charts

The next section of the Dashboard contains a more detailed series of charts about the service.

The graphs on the left show a **monthly breakdown** of the service's performance.
The pink line demonstrates the monthly target (annual target divided by 12).

- The number of referrals to the service by month
- The number of clients who have started a vocational profile by month
- The number of clients supported into work by month
- The number of clients who achieved a 13 week job sustainment by month
- The number of clients who achieved a 26 week job sustainment by month

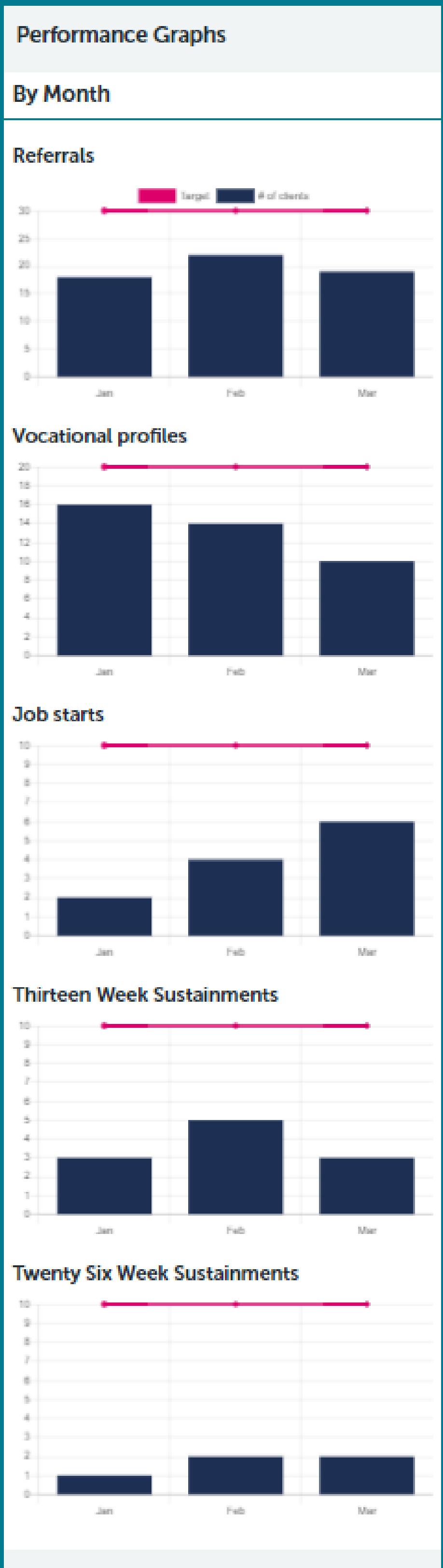


Fig 34

The graphs on the right show a **snapshot** of demographics for clients currently engaged with the service.

- Clients' Age
- Clients' Gender
- Clients' Ethnicity
- Clients' Work Related Benefits

Fig 35

STP Level

User Guide

5

STP Level - Overview

When you log in, the homepage will appear as Homepage Display 2 (see page 8).
At STP Level, you can only view data in the Reporting Tool - you cannot edit or comment.

Feature 1: The Dashboard

Your Dashboard in its current form is very simple. You can view two metrics for the service (see figure 36) which correspond to the core NHS England performance targets:

- **Number of service users receiving support.** This is the total number of service users supported by providers in your STP area in the financial year.
- **Number of clients supported into work.** This is the total number of service users who were supported into work in your STP area.

Year to date	
Number of service users	Number of clients supported into work
118	28

Fig 36

Feature 2: Quarterly Returns

When you click on Quarterly Returns, you can view any quarterly returns submitted by providers within your STP.

You can view previous quarters here too, and when they were last updated. You cannot comment on or edit any data.

Quarterly Returns

2019 - 2020

Quarter 4 (Jan / Feb / Mar 2020) — View
Last updated - 24/3/2020

Quarter 3 (Oct / Nov / Dec 2019) — View
Last updated - 17/12/2019

Quarter 2 (Jul / Aug / Sep 2019) — View
Last updated - 6/2/2020

Quarter 1 (Apr / May / Jun 2019) — View
Last updated - 12/11/2019

2018 - 2019

Quarter 4 (Jan / Feb / Mar 2019) — View
Last updated - 3/2/2020

Fig 37

STP Level - Quarterly Returns

Feature 2: Quarterly Returns

To access the Quarterly Returns, simply click on the quarter you'd like to view:

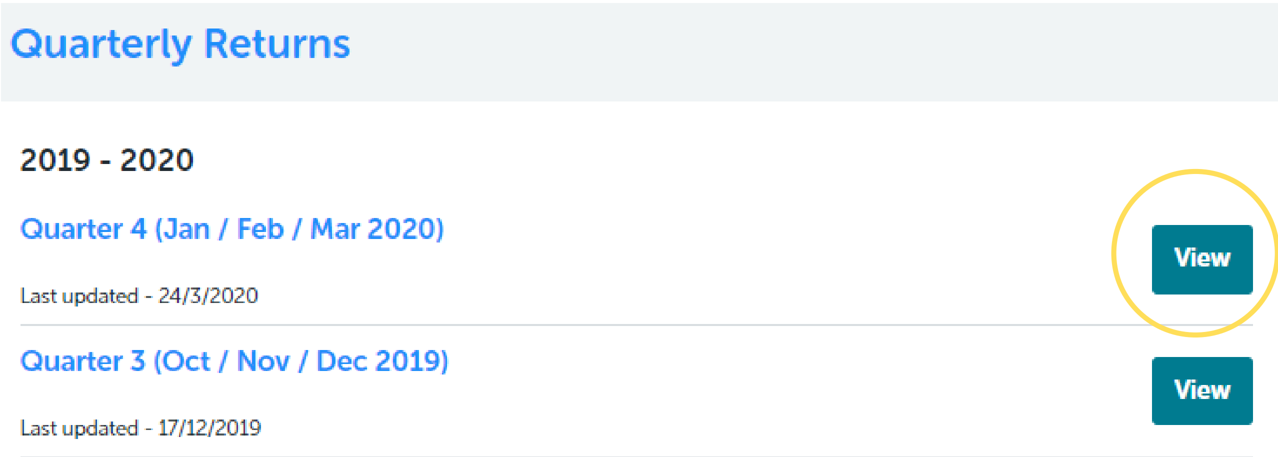
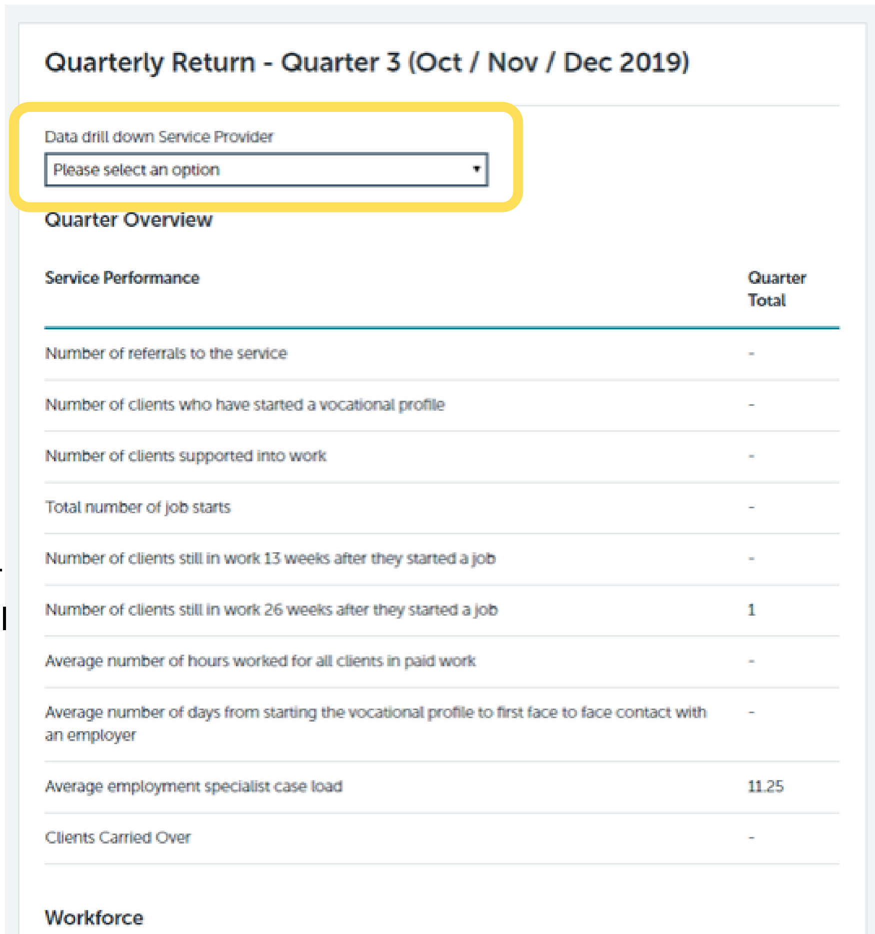


Fig 38

A summary of your STP's performance and workforce metrics for the quarter will appear.

Fig 39


Quarterly Return - Quarter 3 (Oct / Nov / Dec 2019)

Data drill down Service Provider

Please select an option

Quarter Overview

Service Performance	Quarter Total
Number of referrals to the service	-
Number of clients who have started a vocational profile	-
Number of clients supported into work	-
Total number of job starts	-
Number of clients still in work 13 weeks after they started a job	-
Number of clients still in work 26 weeks after they started a job	1
Average number of hours worked for all clients in paid work	-
Average number of days from starting the vocational profile to first face to face contact with an employer	-
Average employment specialist case load	11.25
Clients Carried Over	-

Workforce

Here you can 'drill down' to view individual providers' quarterly returns. This allows you to view narrative and fidelity information for each provider, as well as performance and workforce metrics specific to them.

These metrics are aggregated at an STP level

Regional Level User Guide

6

Regional Level - Overview

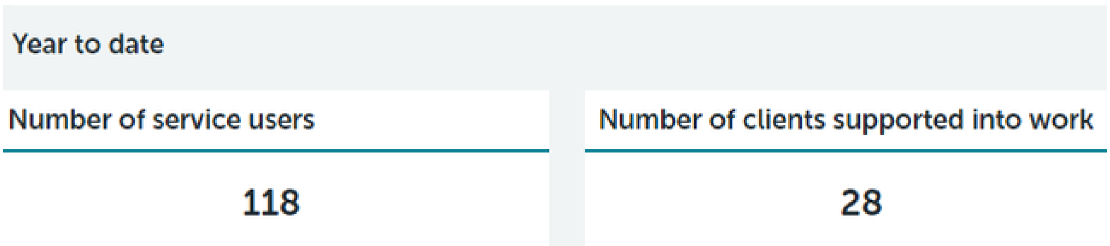
When you log in, the homepage will appear as Homepage Display 2 (see page 8).
At Regional Level you can only view data in the Reporting Tool - you cannot edit or comment.

Feature 1: The Dashboard

Your Dashboard in its current form is very simple. You can view two metrics for the service (see fig 40) which correspond to the core NHS England performance targets:

- **Number of service users receiving support.** This is the total number of service users supported by providers in your Region in the financial year.
- **Number of clients supported into work.** This is the total number of service users who were supported into work in your Region.

Fig 40



Feature 2: Quarterly Returns

When you click on Quarterly Returns, you can view any quarterly returns submitted by providers within your STP.

You can view previous quarters here too, and when they were last updated. You cannot comment on or edit any data.

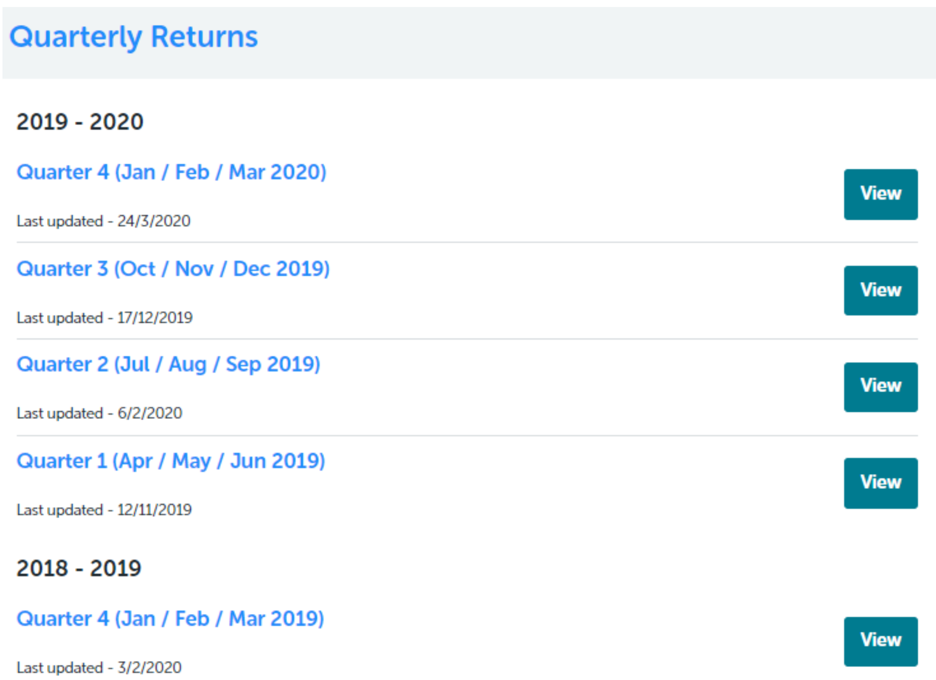


Fig 41

Regional Level - Quarterly Returns

Feature 2: Quarterly Returns

To access the Quarterly Returns, simply click on the quarter you'd like to view:

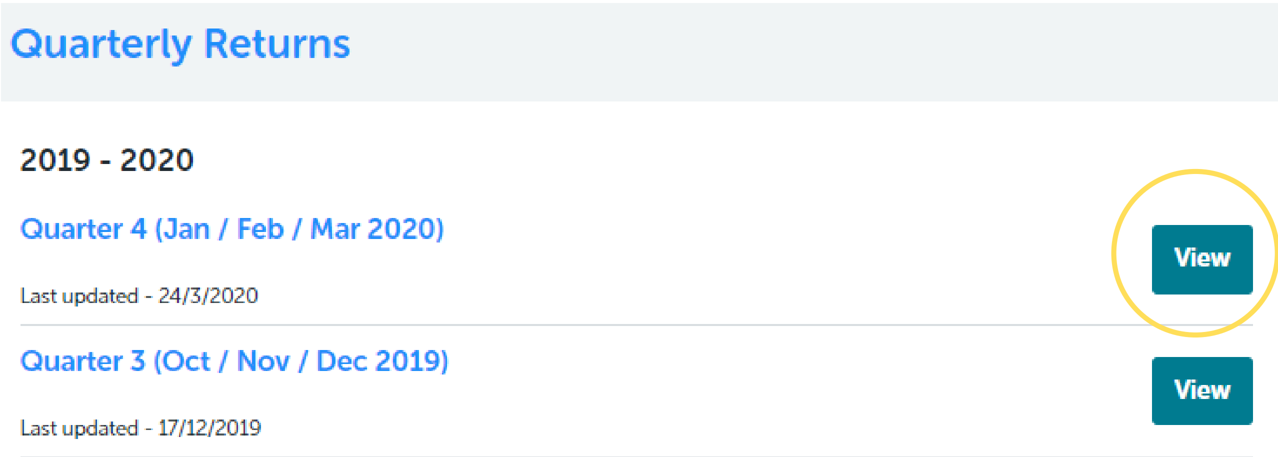
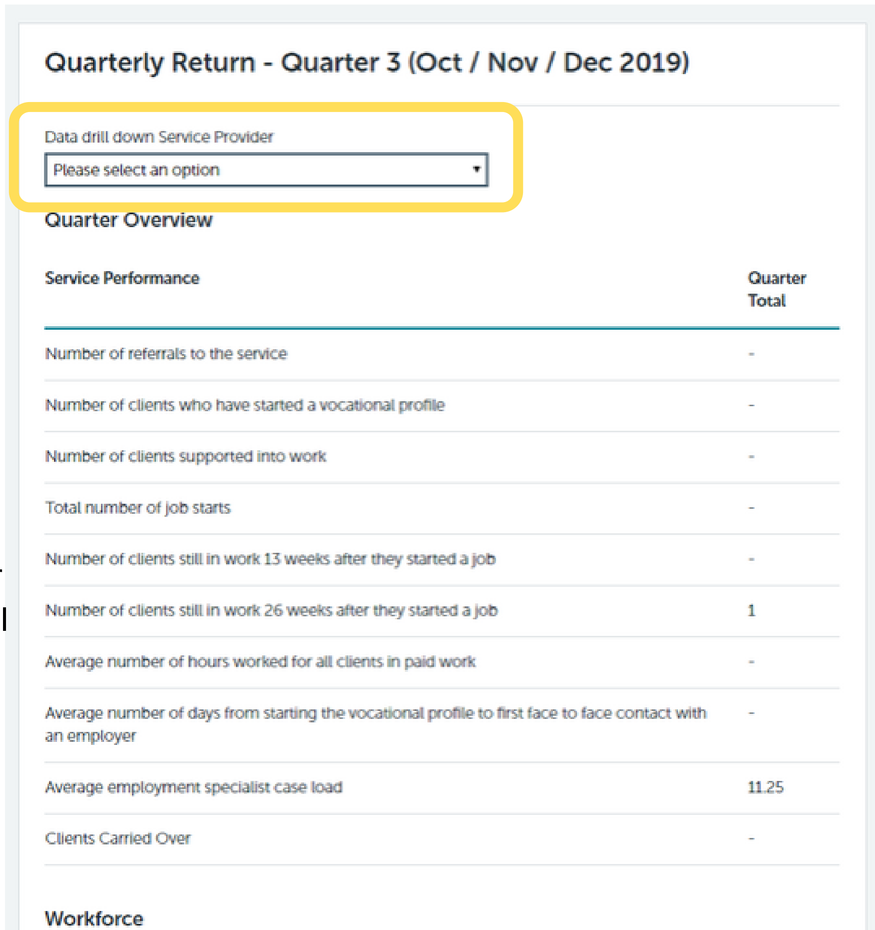


Fig 42

A summary of your STP's performance and workforce metrics for the quarter will appear.



Quarterly Return - Quarter 3 (Oct / Nov / Dec 2019)

Data drill down Service Provider

Please select an option

Quarter Overview

Service Performance	Quarter Total
Number of referrals to the service	-
Number of clients who have started a vocational profile	-
Number of clients supported into work	-
Total number of job starts	-
Number of clients still in work 13 weeks after they started a job	-
Number of clients still in work 26 weeks after they started a job	1
Average number of hours worked for all clients in paid work	-
Average number of days from starting the vocational profile to first face to face contact with an employer	-
Average employment specialist case load	11.25
Clients Carried Over	-

Workforce

Fig 43

Here you can 'drill down' to view individual providers' quarterly returns. This allows you to view narrative and fidelity information for each provider, as well as performance and workforce metrics specific to them.

These metrics are aggregated at an STP level

Help & Resources

7

What if things go wrong?

I can't get my spreadsheet to upload?

Is your file in CSV format? For guidance on how to convert your excel document into a CSV, please see page 53. If there are errors in your excel spreadsheet, these will appear in an error box, please see page 55. If you still cannot get your spreadsheet to upload, please contact support@ipsgrow.org.uk

I think the Reporting Tool is broken?

If you think the Tool has stopped working, please contact BJSS. They can be reached at IPS.Support@bjss.com.

The Reporting Tool will automatically detect some technical faults and generate an error message. If this happens, follow the prompts in the tool, which will instruct you on how to send an error report to BJSS.

I've lost my password

Go to the IPS Grow Tool login page and click on "Forgot your password?" You will receive an email with instructions to set up a new password.

I've uploaded my spreadsheet, but it hasn't populated my dashboard?

The Tool will only read the columns headings it recognises, which means they must match the wording in the IPS Grow Standard Spreadsheet. If you are using your own spreadsheet or if you have changed the column headings to a different wording, or removed them, the tool will not read this data.

You might also want to check that you selected the right quarter when uploading the spreadsheet. Remember that the Reporting Tool counts in calendar years, not financial years, so Q1 refers to the months of January to March.

I don't understand how to adopt my spreadsheet to use with the Reporting Tool?

If you need support adapting your existing spreadsheets to use with the Reporting Tool, please contact the IPS Grow Lead for your region. *Click here for contact details.*

How to save a file to CSV

Comma-separated values (CSV) is the format the spreadsheet needs to be to use with the Reporting Tool

To import your Excel spreadsheet to the Reporting Tool, you will need to convert it to a .csv file first.

To do this, click on the File tab in your Excel spreadsheet, and then click Save As.

In the 'Save As' type box, choose to save your Excel file as **CSV (Comma delimited)** (see figure 44)

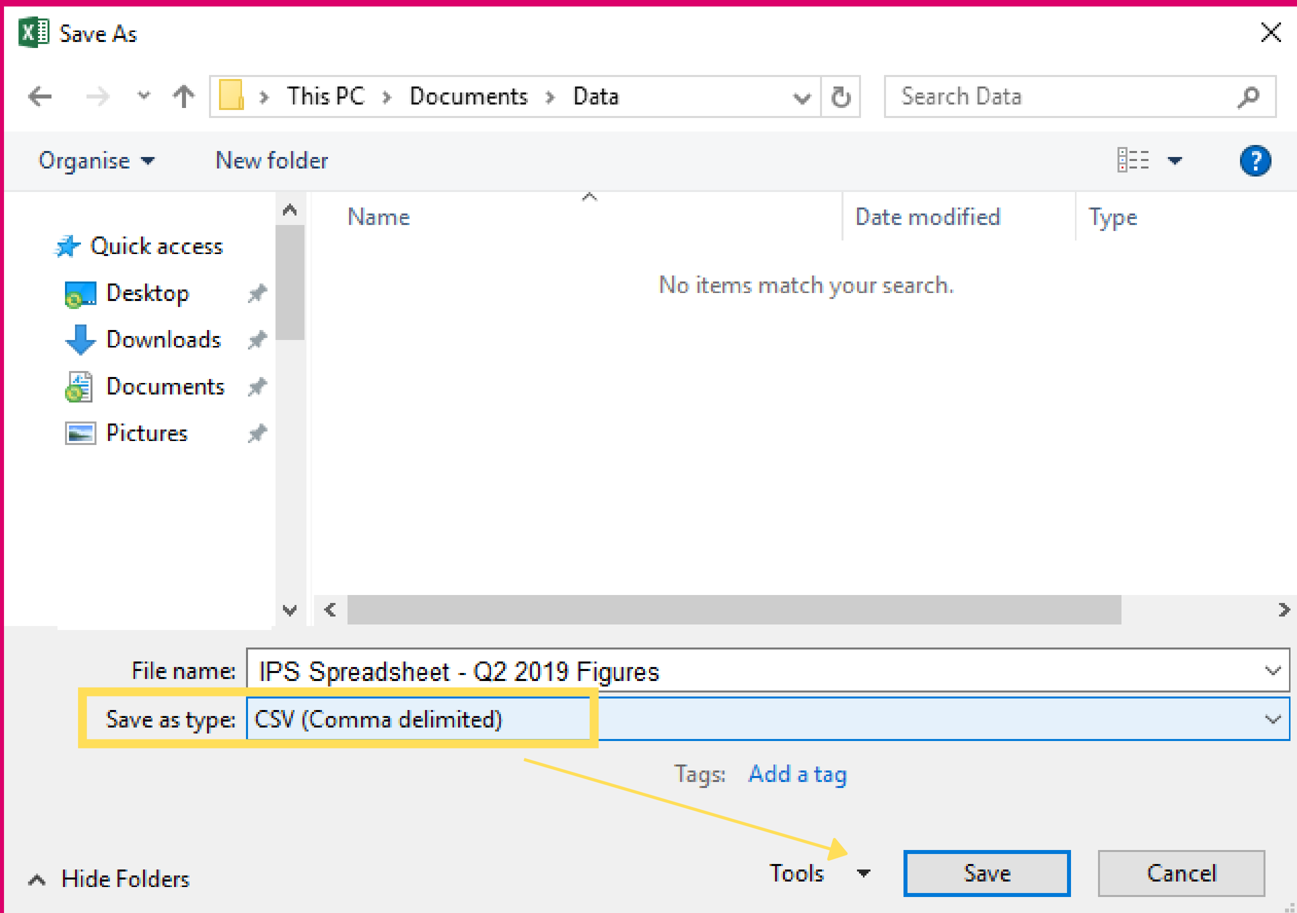


Fig 44

In addition to CSV (Comma delimited), you'll notice a number of csv formats available:

- CSV (MS-DOS) (*.csv)
- CSV UTF-8 (Comma delimited) (*.csv)
- CSV (Macintosh) (*.csv)
- CSV (MS-DOS) (*.csv)

You can save your spreadsheet in any of these formats to upload to the Tool.

Top Tip..

Before converting your Excel file to CSV ensure you have saved a copy of your Excel file. You will need to continue using the Excel Spreadsheet, and it is not possible to convert a CSV file back to an Excel file.

How to save a file to CSV

Comma-separated values (CSV) is the format the spreadsheet needs to be to use with the Reporting Tool

Choose the destination folder where you want to save your CSV file, and then click 'Save'.

After you click 'Save', Excel will display two dialogs. Don't worry, these are not error messages and everything is going right.

The first dialog is to remind you that only the **active Excel tab** will be saved in the CSV file format. This means that if you have more than one tab in the excel file (e.g. the cover sheet in the Standard Spreadsheet), they will not be converted to CSV. **Click OK.**

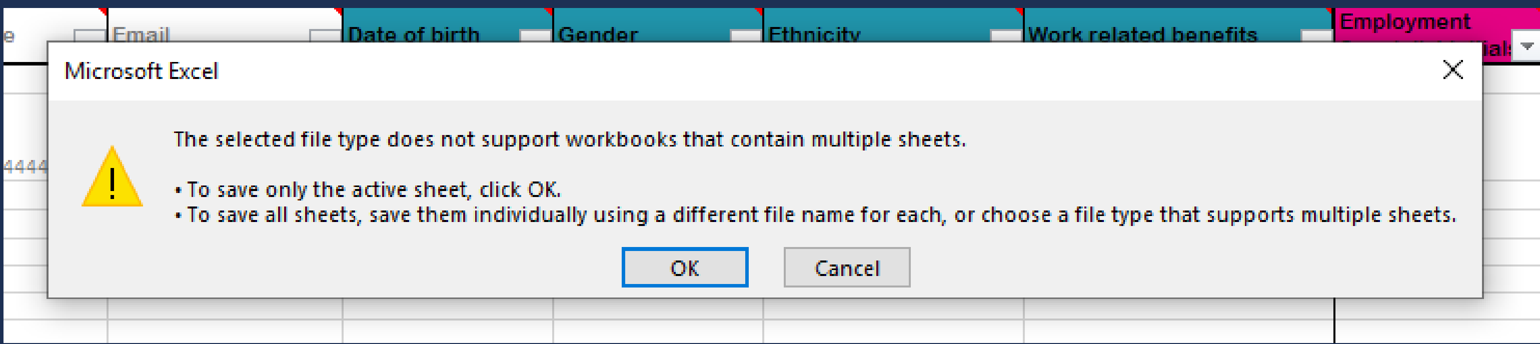
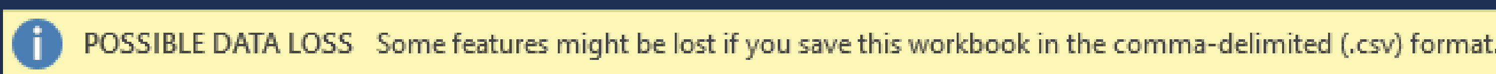


Fig 45

Clicking 'OK' in the first dialog will display a second message informing you that your worksheet may contain features unsupported by the CSV format.



This is fine, simply click Yes.

That's It! You've now converted your Excel to CSV.

Spreadsheet Errors

If there is unreadable data in your spreadsheet, the Reporting Tool will show an error message which will point out where the error lies.

For example, the error message below highlights various errors in the spreadsheet and gives details so you can make the necessary amendments.

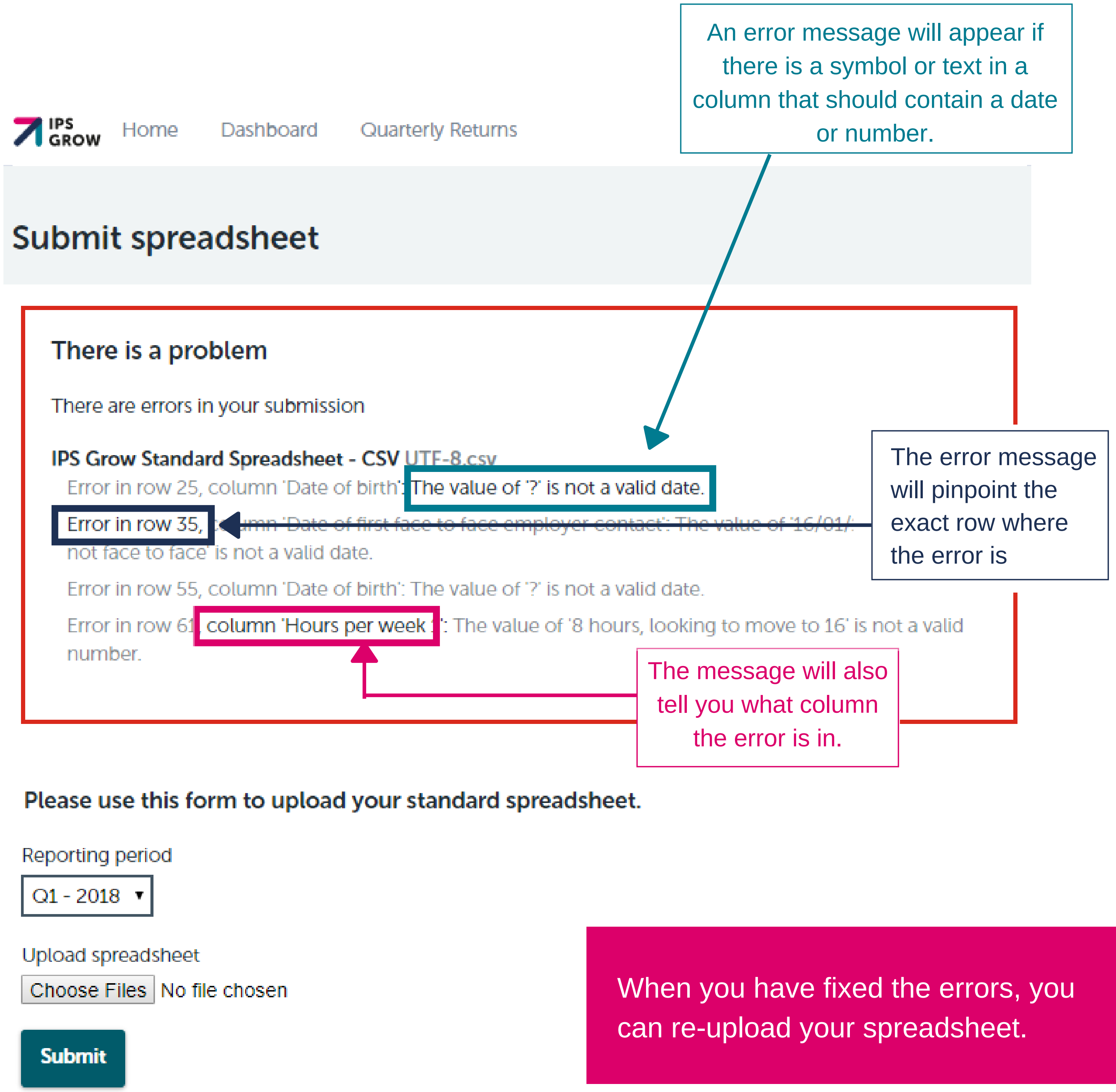
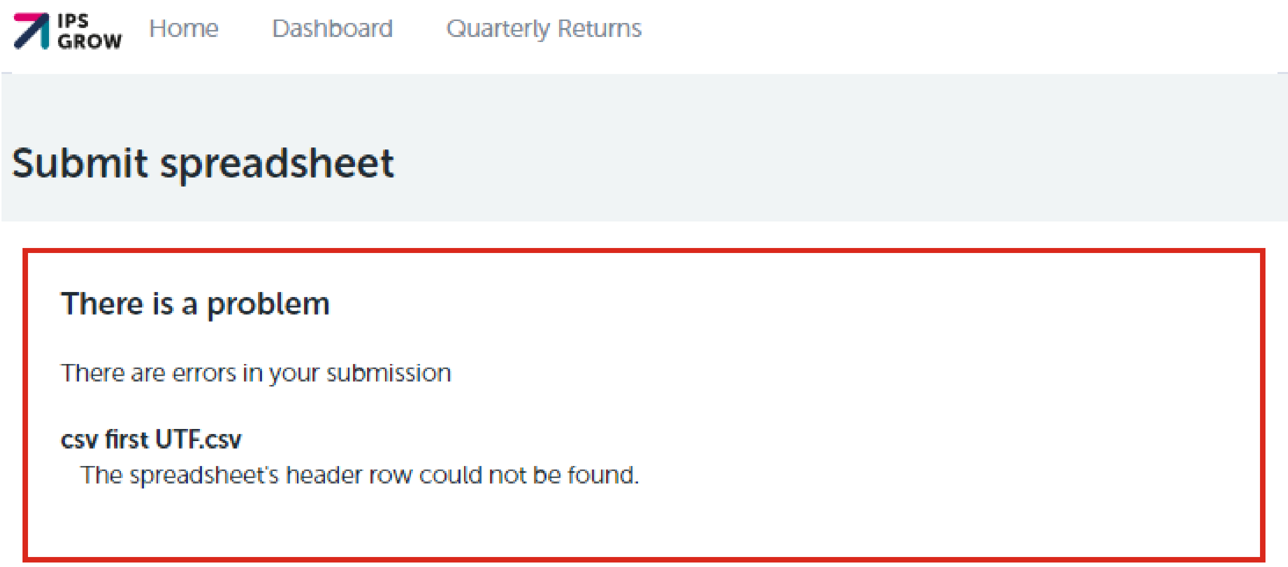


Fig 46

Spreadsheet Errors

The Reporting Tool cannot read CSV files that do not include the correct headings. The headings should match those in the IPS Grow Standard Spreadsheet. If the headings do not match, you will receive this error message:

Fig 47



Cross-check your headings against the IPS Grow Standard Spreadsheet and re-upload your CSV.

Top Tip..

If you are using the IPS Grow Reporting Tool, you may upload any spreadsheet providing that:

1) The headings you want the Tool to read match the IPS Grow Standard Spreadsheet, and are situated in the first 10 rows of your spreadsheet.
2) The information is contained within 1 tab.
3) There is only one line per client.

Further Resources

Access our other resources to assist with your IPS data and reporting here:

- Reporting Tool

- IPS Grow Website

- Standard Spreadsheet Guidance

- IPS Grow Leads Offering and Contact Details