IPS Grow Standard Spreadsheet

Guidance Document

IPS Grow Standard Spreadsheet

The IPS Grow Standard Spreadsheet is the recommended method for IPS services to record client information for reporting purposes.

The 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 can be used in conjunction with the IPS Reporting Tool to create reports for performance monitoring.

The IPS Grow Reporting Tool is a web-based application that allows you to upload your Spreadsheets to generate reports. These reports can be used for internal purposes (e.g. to help team leaders keep track of employment specialists' activities and to support supervision) or can be shared with external stakeholders (e.g. local commissioners, to support contract review meetings). If you are in receipt of NHS England Transformation Funding, you can submit your quarterly reports online using the Reporting Tool.

This Guidance Document:

Describes the structure of the Standard Spreadsheet

Provides a definition of each datapoint in the Spreadsheet

Outlines a rationale for collecting each datapoint

Explains how the Reporting Tool will read the data to create dashboards

Highlights the Do's and Don'ts for recording data using the Standard Spreadsheet

Access the IPS Grow Reporting Tool here:

ipsgrow-report.org.uk

Structure and Layout

There are three categories of information in the IPS Grow Standard Spreadsheet:

1) Client Information

Including contact details and demographic information about the client (such as gender or date of birth).

Client ID	Name	Telephone	Email	Date of birth	Gender	Ethnicity	Work related benefits
02746394JP	John Smith	07571 262 4444	john.smith@gmail.com	20/09/1987	Female	Mixed - Any other mixed background	Universal Credit - Limited Capacity for Work or Work Related Activity

2) Service Information

Information about the client's journey through the service. This includes key dates, caseload and job search information.

Employment Specialist initials	Referral date	Referral source	Referrer name	Employment status on referral	Date of first attempted contact	Date Vocational Profile started	Date of first face to face employer contact	Caseload status	Discharge date	Reason for discharge
LO	25/08/2018	Source 1	Mary Jones	Unemployed	29/08/2018	19/09/2018	21/09/2018	In work support	27/10/2019	Completed support

3) Employment Information

Information about the different jobs a client may be supported to start and sustain while on the service.

1st Job					2nd Job				
1st job start date	Hours per week 1	Employer	Role	1st job end date	2nd job start date	Hours per week 2	Employer	Role	2nd job end date
01/01/2018	18	Pizza Express	Waiter	09/09/2018	10/10/2018				

The IPS Grow Standard Spreadsheet records information on a single sheet at a client level. This means that all information about a client's background information, journey through the IPS service and employment information can be read on a single row of the Spreadsheet.
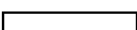
Don't...

Use multiple rows to record information on a single client

Everything you need to record about a client should fit in a single row. If you are using the IPS Grow Reporting Tool it is important not to record a client twice in the same Spreadsheet as the Tool will then count them as two people. The Standard Spreadsheet includes a "duplicates check" which will help you pick up on any clients accidentally listed more than once.

Structure and Layout

Individual fields (columns) in the Spreadsheet are further categorised as Mandatory, Optional or Other:

- Mandatory fields are in pink. These are the fields which the IPS Grow Reporting Tool will read when creating service dashboards and reports. They are the necessary fields to complete if you want to use the Reporting Tool.

- Optional reporting fields are in teal. These are not mandatory to fill in but will give more detailed reports at a provider/local commissioning level.

- Other fields are in white. These fields are purely for use at a provider level. These fields will not be read by the Reporting Tool and will not appear in any service dashboards or reports.

Key

	=	Mandatory field
	=	Optional field
	=	Other field (for the provider's use only, data not read by the tool)

Do...   Customise your Spreadsheet

The Standard Spreadsheet includes the recommended datapoints for an IPS service to collect. However, your service may need to collect additional information specific to your contract/local context. Add or remove Optional or Other columns to suit your needs.

Note: The Standard Spreadsheet is password protected. If you ever need to unprotect it, the password is IPSGrow.

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.
2) The information is contained within 1 tab.
3) There is only one line per client.

Client Information

The first section of the IPS Grow Standard Spreadsheet records background information about the client. All this information is either optional to fill out or is not read by the Reporting Tool.

Heading	Definition	Field type	Rationale for inclusion	Tips for recording data
Client ID	Client's unique ID for the service.	Other	Helps identify duplicate entries in the spreadsheet (more reliable than name in case two clients have the same name).	The duplicates column at the end of the spreadsheet uses Client ID to identify duplicate entries.
Contact information	Client's name, email address, and phone number.	Other	Maintains information about the client in the same place.	Please note that this information is for the provider's use only. This information will not be read by the IPS Grow Reporting Tool.
Date of birth	Client's date of birth recorded as DD/MM/YYYY	Optional	Equal access information collected so that providers and commissioners can assess whether the service is reaching a representative range of ages, genders and ethnicities.	Ensure that you only record dates in date columns (no text). Any notes can be added as a comment or recorded in the comments section at the end of the Spreadsheet. Demographic data (DoB, Gender, Ethnicity, Benefits) will show in the dashboard as a snapshot of the current caseload, even if you submit a file for previous quarters.
Gender	Client's gender. Select from: • Female • Male • Other • Prefer not to say	Optional		Research the ethnic makeup of your area to assess whether you are reaching the expected number of people from each group.
Ethnicity	Client's ethnicity. Select from one of 20 categories. (See page 12 for a list).	Optional		
Work related benefits	Client's work-related benefits. Select one of 10 categories. (See page 12 for a list).	Optional		This category does not include benefits which are non-work related (e.g. PIP, housing benefit, etc.). If you need to collect this data, please add another column to the Spreadsheet.

Service Information

The second section of the IPS Grow Standard Spreadsheet records information about the client's contact with the service. This section will help you track KPIs, monitor caseload information and record the client's stage on their journey to employment. This section includes mandatory fields that should be kept up-to-date if you are using the Reporting Tool.

Heading	Definition	Field type	Rationale for inclusion	Tips for recording data
Employment specialist initials	Initials of the employment specialist who received the referral and/or will be working with the client.	Mandatory	This field is mandatory because it allows the reporting tool to calculate caseloads KPIs per employment specialist.	If two employment specialists have the same initials, include the initials of their middle name to differentiate between the two.
Referral date	Date that the referral was received by the employment specialist. *Note: this is not necessarily the same as the date that the referral was made by the care coordinator.*	Mandatory	Allows tracking of number of referrals over time. Links with the Mental Health Standard Dataset.	If employment specialists (ES) within the team generate their own referrals, record the ES initials in the referral column at the same time as you record the referral date. This will allow the Reporting Tool to report on referrals per ES.
Referral source	Services may set their own optional dropdowns for this category. To set this up, use the dropdown section in the cover page of the Standard Spreadsheet.	Optional	Services may wish to record more detail about where referrals are coming from. • Geographical split of referrals • Team that made the referral • Method of referral (e.g. self-referral, direct referral by a clinician etc.)	Work with your local commissioner to decide which categories would be most useful in your local context. Consider what categories could best support decision making.
Referrer name	Name of the person who made the referral.	Other	Allows more precise tracking of where referrals are coming from.	Please note that this information is for the provider's use only. This information will not be read by the Reporting Tool.
Employment status on referral	Whether the client was employed or unemployed upon referral to the service.	Optional	Allows services to track how many retention cases they have in the service. Retention work is defined as support to help a client: • Return to same job with the same employer. • Move to a different job with the same employer. • Find the same job with a different employer. • Find a different job with a different employer.	There is a tension between IPS fidelity and job retention. However, IPS Grow recognises that job retention can be a life-saving intervention if work-related stress is impacting on mental health. As a guideline, we suggest that IPS services work with no more than 5 job retention cases per caseload. This guidance may be reviewed once an analysis of job retention practices among IPS services in the UK has been conducted.

Service Information

Heading	Definition	Field type	Rationale for inclusion	Tips for recording data
Date of first attempted contact	Date that the employment specialist first attempted to contact the client via phone, email, text or face to face.	Optional	A key performance indicator which allows teams to track how quickly they are engaging with clients who have been referred to the service.	Employment specialists may include this date even if the client did not respond to the attempted contact. The IPS Grow recommendation is that first attempted contact should happen within 5 days.
Date vocational profile started	Date that the client and employment specialist started work on the vocational profile.	Mandatory	IPS Grow recommends using the date a vocational profile was started as a measure of the number of clients that have engaged with the service. The Tool counts the number of clients who have started a vocational profile, in order to calculate the number of engagements.	The vocational profile is a living document that can be updated as a client develops their employment goals. Therefore, IPS Grow recommends not waiting until a vocational profile is "completed" to count a client as engaged.
Date of first face to face employer contact	Date of the first face to face contact with an employer, either by the client or by the employment specialist on behalf of the client.	Mandatory	Rapid job search is one of the eight key principles of IPS. As such, IPS fidelity sets the target of the face to face contact with an employer happening within 28 days of the client engaging with the service.	

How can I track softer outcomes for my clients, such as volunteering, education etc?

You can customise the Spreadsheet to include any additional information/data you wish to record. Simply add additional columns to the Spreadsheet with a different heading.
Please note: The Reporting Tool will not aggregate or record this data - only the existing mandatory and optional columns will be measured by the Reporting Tool.

Service Information

Heading	Definition	Field type	Rationale for inclusion	Tips for recording data
Caseload status	The client's stage on their journey through the service.	Optional	These fields can be used in supervision for more detail on the employment specialist's caseload.	Dropdown options include: • On waiting list. *Clients who have been referred but are on a waiting list due to full caseloads.* • Actively seeking work. *Clients who have started the job search process.* • In-work support. *Clients who have gained a job and are being supported to remain in that job. Support may be more intensive in the first month of in-work support.* • On hold. *Clients who have not been discharged but are not working with the service for a period of time, often due to health reasons.* • Discharged. *Clients who have been discharged from the service. Remember to enter a discharge date in the next column so that they don't show up on the employment specialist's caseload.*
Discharge date	Date that the client was discharged from the employment specialist's caseload.	Mandatory	This field allows you to track the size of each employment specialist's caseload at any time.	
Reason for discharge	Reason that the client was discharged from the employment specialist's caseload.	Optional	Gives a sense of why clients were discharged from the service, for example, whether they completed support or stopped responding to attempted contact.	Dropdown options include: • Completed support. *Client has gained all they can from the service and has been discharged.* • Unable to contact. *Client has fallen out of contact with the employment specialist.* • Declined support. *Client does not want support or requires a different service.* • Inappropriate referral. *Client is not suited to the service e.g. does not wish to find work at this time.* • Other.

Employment Information

The third section of the IPS Grow Standard Spreadsheet records information about the different jobs a client may be supported to start while using the service. This section includes mandatory fields that should be kept up-to-date if you are using the Reporting Tool.

Heading	Definition	Field type	Rationale for inclusion	Tips for recording data
1st job start date	Date that the client started their first job	Mandatory	Used to calculate number of clients who have been supported into work, as well as job sustainments.	This should only be recorded once the client has worked for more than 4 hours.
Hours per week	Average number of hours worked per week by the client	Mandatory	Used to track client progression.	For clients who are self-employed or on zero hours contracts, take the average over the first month of work. You may update this column whenever you want.
Employer	Name of the client's employer.	Other	This information is for the provider's use only. This information will not be read by the Reporting Tool.	
Role	Client's job title or role.	Other	This information is for the provider's use only. This information will not be read by the Reporting Tool.	
1st job end date	Date that the client left this employment.	Mandatory	This field is used to calculate job sustainments (please see below for how this is calculated).	If this column is not filled in, but a start date has been entered, the Tool will assume that the client is still in the job.

Top Tip..

Some providers collect evidence of job starts. IPS Grow recommend the following forms of evidence for job starts:

- Job offer letter/ contract.
- Confirmation of employment of at least 1 day e.g: a time-sheet, payslip or signed declaration (from client or employer).

Do..

Use the Reporting Tool to automatically calculate job sustainments

The Standard Spreadsheet can record up to five jobs for a single client. If you choose to use these fields, the IPS Grow Reporting Tool can calculate job sustainments for you. Simply make sure columns T to AR are included in your Spreadsheet and delete columns AS and AT before you upload your Spreadsheet to the Tool.

The Reporting Tool uses the IPS Grow recommended calculation for job sustainments which is defined below:

> ***Sustained employment*** *is measured regardless of whether this duration was accrued over the same job or multiple jobs. Breaks in employment for clients with multiple jobs must be less than 6 weeks between jobs. If a gap of more than 6 weeks occurs, the clock will reset and sustainments will be calculated from the start date of the subsequent job. Only one job sustainment outcome of each duration (13, 26 weeks) will be counted for each person referred into the service.*

If you would prefer to enter your own sustainment dates simply use columns AS and AT to enter your 13 and 26 week sustainment dates for the client. Remember to still enter the date the client started their first job in column T, so that the tool can calculate the number of job starts.

Why does the spreadsheet only measure up to 26 weeks?

After a number of informed discussions and consultations, most services were in agreement that the optimum period to measure direct outcomes was within the first 26 weeks. Therefore sustainment within the tool is measured up to 26 weeks rather than 52 weeks.

Don't..

Enter text into number or date columns

The Standard Spreadsheet has a number of checks included to make sure only the right type of information can be entered into each column (dates, numbers, text). However, you might decide to amend the spreadsheet or use your own version. If you are using the Reporting Tool, entering the wrong type of information in a column will result in an error, so be sure to check this before uploading.

Other Information

List of dropdowns

Comments –

The Standard Spreadsheet includes a column for employment specialists/team leads to record any comments about the client. This is for internal use only and is not stored by the Reporting Tool.

Gender

Male
Female
Other
Prefer not to say

Duplicates check –

The Standard Spreadsheet includes a duplicates check at the end of the Spreadsheet. This looks at unique IDs (column A) to make sure the same client is not recorded twice. If a client is recorded more than once the cell will turn red and count how many times they show up in the Spreadsheet.

Ethnicity

Asian or Asian British - Any other
Asian or Asian British - Bangladeshi
Asian or Asian British - Chinese
Asian or Asian British - Indian
Asian or Asian British - Pakistani
Black or Black British
Black or Black British - African
Black or Black British - Caribbean
Black or Black British - Any other
Mixed - White and Asian
Mixed - White and Black African
Mixed - White and Black Caribbean
Mixed - Any other mixed background
Other Ethnic Groups - Arab
Any other ethnic group
White - British
White - Irish
White - Gypsy or Irish Traveller
White - Any other White background
Prefer not to say

Work Related benefits

ESA Support Group
ESA Work Related Activity Group
ESA Other
Incapacity Benefit
Income Support
Incapacity Benefit and Income Support
Job Seekers Allowance
Universal Credit
Universal Credit - Limited Capacity for Work
Universal Credit - Limited Capacity for Work or Work Related Activity