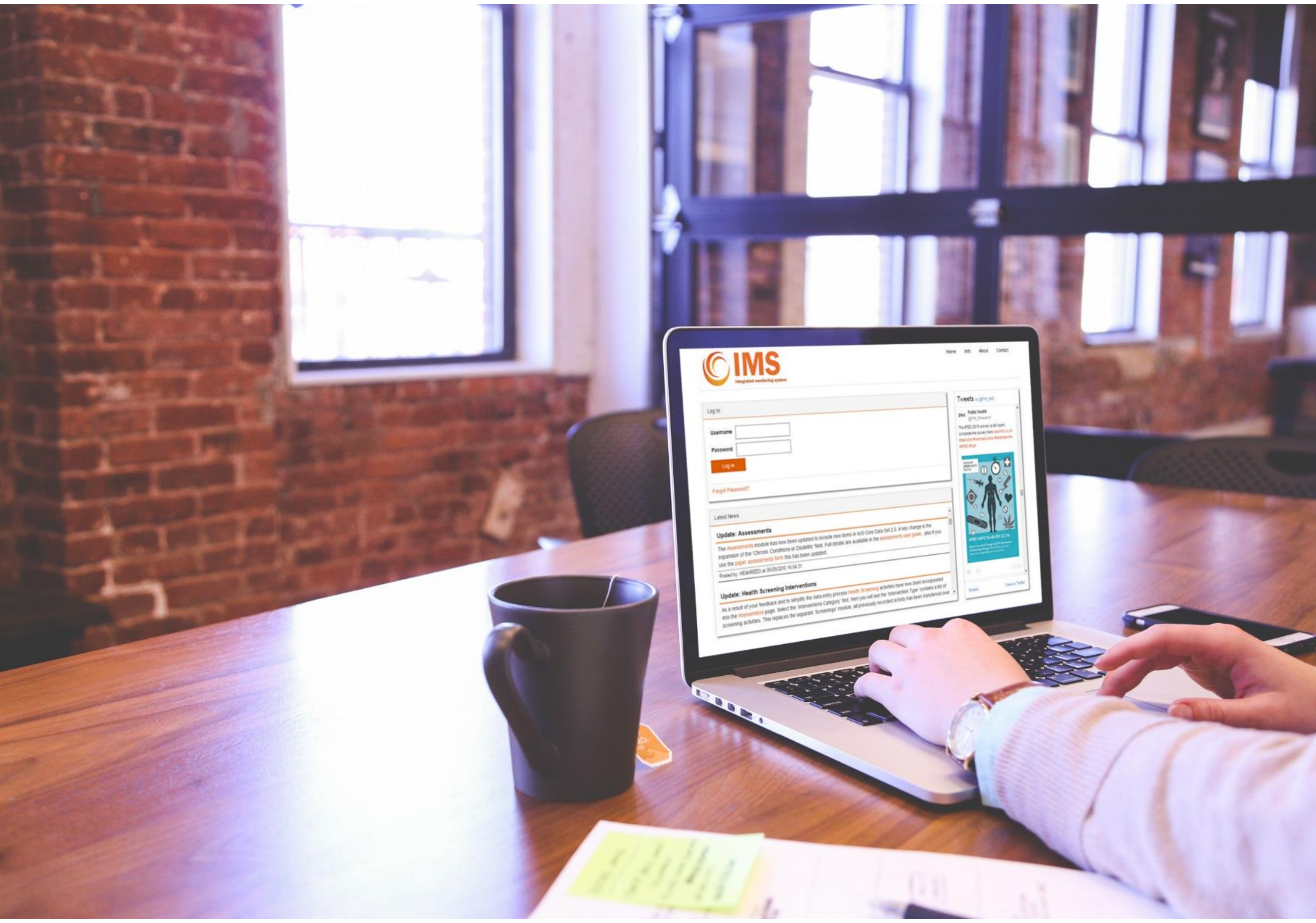
IMS
integrated monitoring system

Integrated Monitoring System

User Guide

November 2016

Version 2.0



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Version Control

Version Number	Change Summary	Updated By	Change Date
1.0	IMS Online user guide first version	HEAHREED	23/09/14
2.0	IMS Online user guide version 2.0	HEAHREED	07/11/16

INTRODUCTION

IMS Online is a tool for recording activity including Drug and Alcohol brief interventions, health & wellbeing reviews, and needle & syringe exchange transactions. Use of IMS Online allows activity delivered by treatment services to be included within the Integrated Monitoring System (IMS). Further details of the data items that are collected for IMS can be found in Appendix C. The minimum system requirements for using IMS Online can be found in Appendix D.

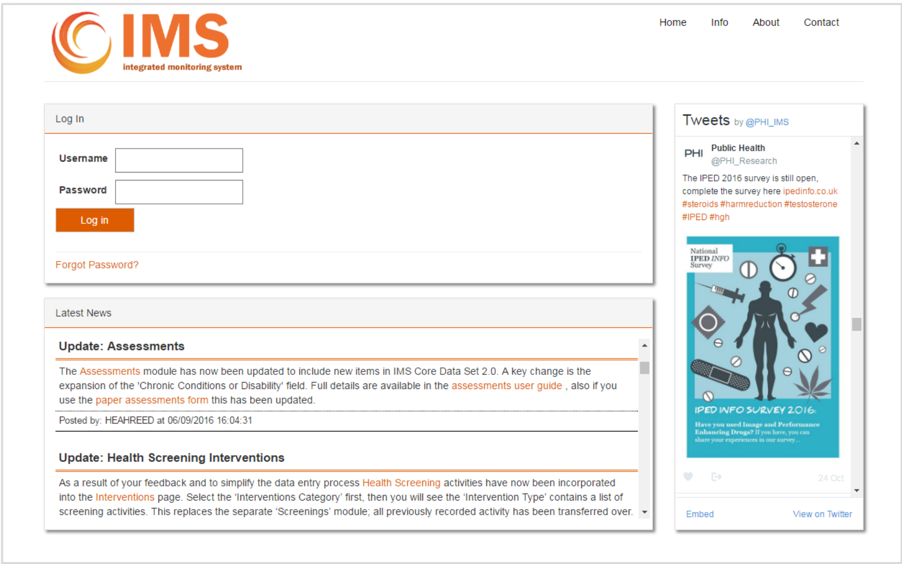
Further details about IMS and previous IMS Reports are available from: https://ims.ljmu.ac.uk/info

GETTING STARTED

Logging in to IMS Online

All users access the system via the Internet. The web address is https://ims.ljmu.ac.uk

You must type in the web address exactly as above; this is a secure website so make sure you include the **https** or otherwise the page may not work.



To log in, enter your ***Username*** and ***Password*** in the boxes shown and click the orange ***Log in*** button.

The ***Forgot Password*** link allows you to enter your username and email to receive a new password; this is sent to your registered email address.

The log on screen displays latest news such as any planned updates, or the date of the next quarterly data deadline, and there's a Twitter feed from the PHI Monitoring Team.

Terms and conditions

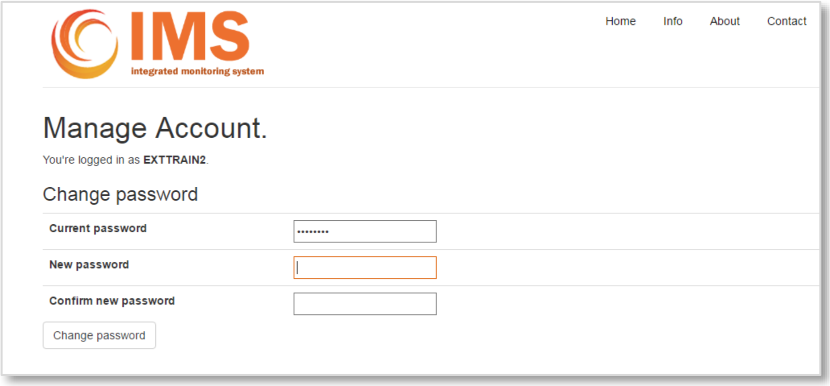
After logging into for the first time you will be presented with the IMS Online terms & conditions page. In order to use IMS Online it is mandatory to accept the terms & conditions by clicking on the ***I Accept*** button. Once you've agreed the terms and conditions this screen won't appear at future logins.

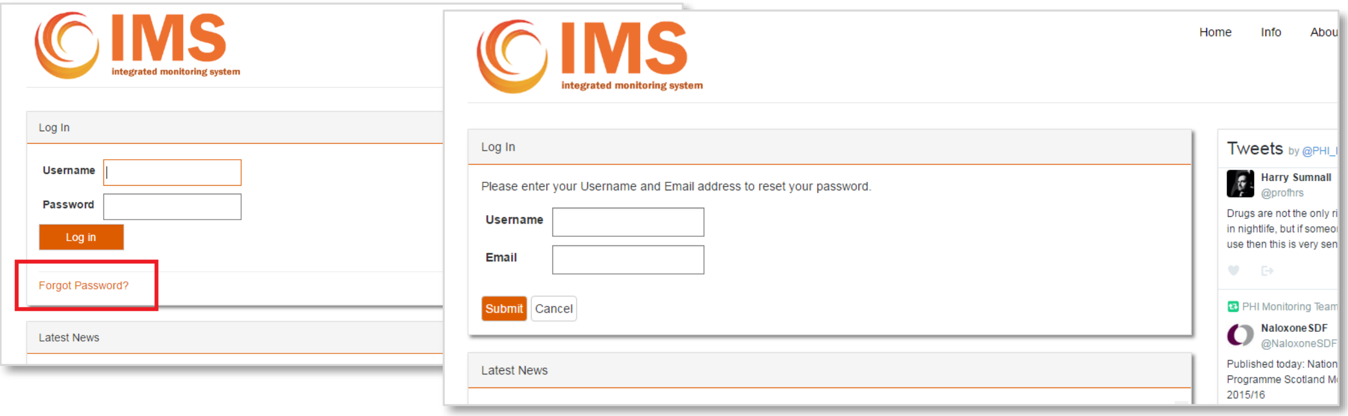
Your User Account & Password

When your username for IMS Online is created you will receive an automatically generated email containing your user details.
Important: Before you can login for the first time you must click on the link within this email as this verifies your details and activates your IMS Online account.

Once you have logged in to IMS Online you should use the ***Change Password*** option to change it to something that only you will remember.

Your password must be between 6 and 14 characters long.





Your account is automatically locked after ten attempts to login with an incorrect password, if this happens contact us to unlock your account.

If you forget your password you should click the ***Forgot Password*** link on the ***Login*** page. This allows you to enter your username and email and then sends a reset link to the email address that's registered to your account.

If you forget your username or need to change the registered email address, just contact us and we'll help you.

Remember you should never share your password. If other colleagues require access to IMS Online then your agency ***SuperUser*** may set up new user accounts, or contact us and we'll help. **https://ims.ljmu.ac.uk/contact**

Log Off

When you've finished remember to click the orange ***Log Off*** button which appears next to your username in the top right hand corner of the screen; this will prevent unauthorised access and keep your data secure.

If you do not use IMS Online for longer than 30 minutes you will automatically be logged off. When this happens you will be taken back to the ***Login*** screen - simply re-enter your username and password to continue.

IMS ONLINE MENU

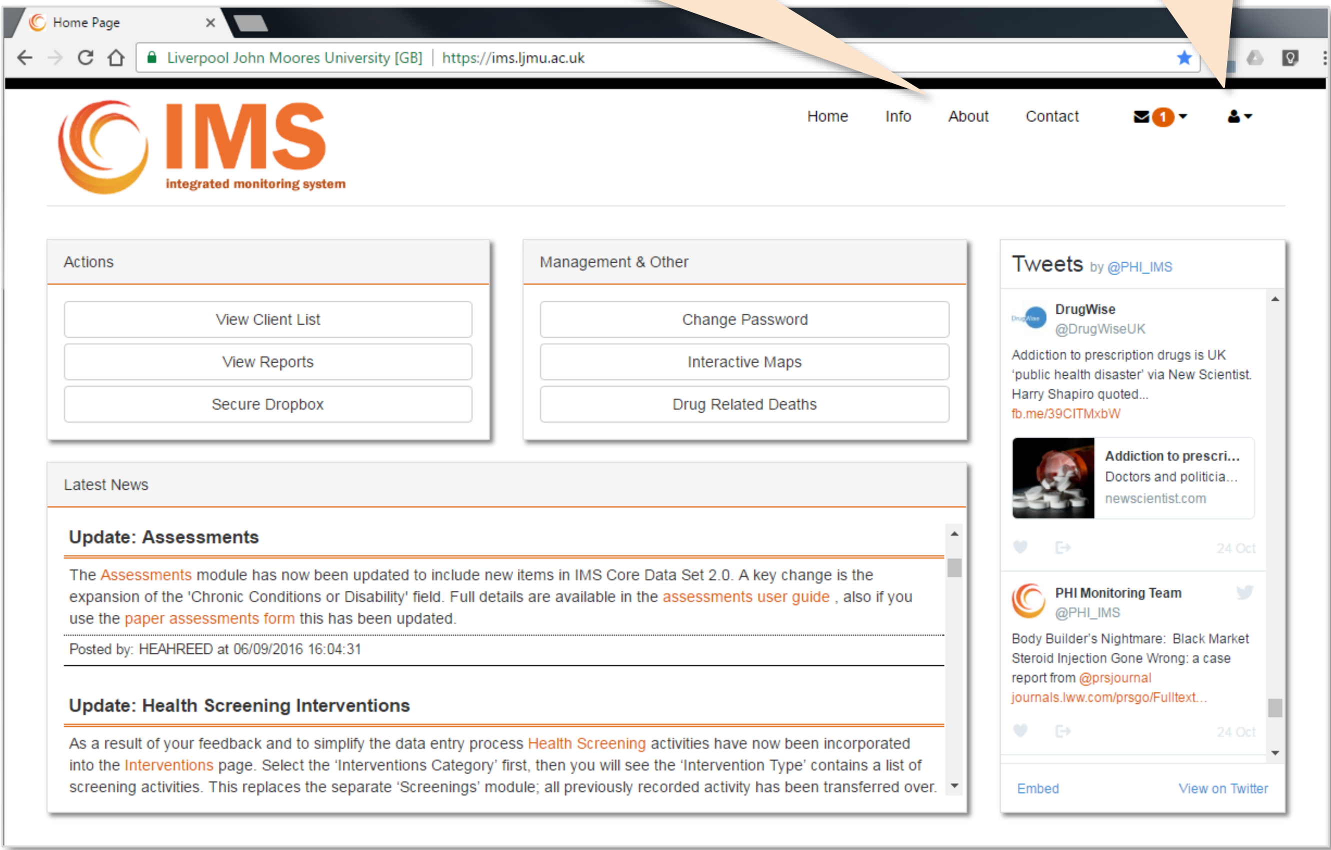
Home Page

When you are logged into IMS Online the ***Home Page*** will appear as shown here.

The top menu links…
Home: always brings you back to this *Home Page.*
Info: quarterly & annual reports, user guides & other IMS information.
About: more about us, IMS online and the Public Health Institute.
Contact: our contact details; we're always available if you're stuck.

The user icon shows you are logged in, click it to change password or log out.

The mail envelope shows how many new files you have in the *Secure Dropbox.*



The menu options shown here may vary depending on which modules you have access to. They are covered in more detail in this user guide:

View Client List: a full list of the clients for your agency(s)

View Reports: various options to generate reports from your own data

Secure Dropbox: for secure transfer of documents to (or from) our team at the Public Health Institute

Change Password: the page where you can change your password

Create Extract: function which allows you to extract your own data for analysis as an excel spreadsheet

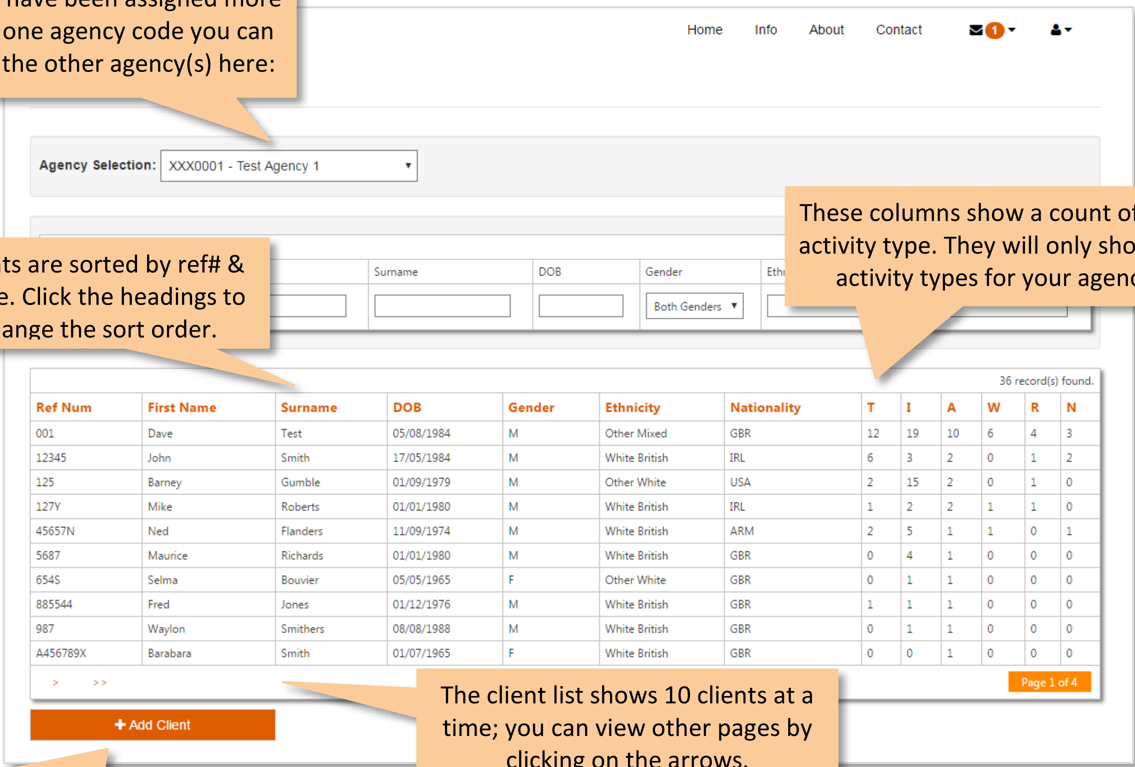
Interactive Maps: IMS data displayed geographically by local authority and postcode areas

Drug Related Deaths: DRD form to allow collaboration and data entry for DRD surveillance

CLIENT LIST SCREEN

This screen shows all the clients for your agency. If you have been assigned more than one agency code you can view the other agency(s) with the dropdown box at the top of this screen. When first opened the screen will show all clients for your default agency code, sorted by ***Client reference*** (if used) then by ***Client name***.

If you have been assigned more than one agency code you can view the other agency(s) here:



Ref Num	First Name	Surname	DOB	Gender	Ethnicity	Nationality	T	I	A	W	R	N
001	Dave	Test	05/08/1984	M	Other Mixed	GBR	12	19	10	6	4	3
12345	John	Smith	17/05/1984	M	White British	IRL	6	3	2	0	1	2
125	Barney	Gumble	01/09/1979	M	Other White	USA	2	15	2	0	1	0
127Y	Mike	Roberts	01/01/1980	M	White British	IRL	1	2	2	1	1	0
45657N	Ned	Flanders	11/09/1974	M	White British	ARM	2	5	1	1	0	1
5687	Maurice	Richards	01/01/1980	M	White British	GBR	0	4	1	0	0	0
654S	Selma	Bouvier	05/05/1965	F	Other White	GBR	0	1	1	0	0	0
885544	Fred	Jones	01/12/1976	M	White British	GBR	1	1	1	0	0	0
987	Waylon	Smithers	08/08/1988	M	White British	GBR	0	1	1	0	0	0
A456789X	Barabara	Smith	01/07/1965	F	White British	GBR	0	0	1	0	0	0

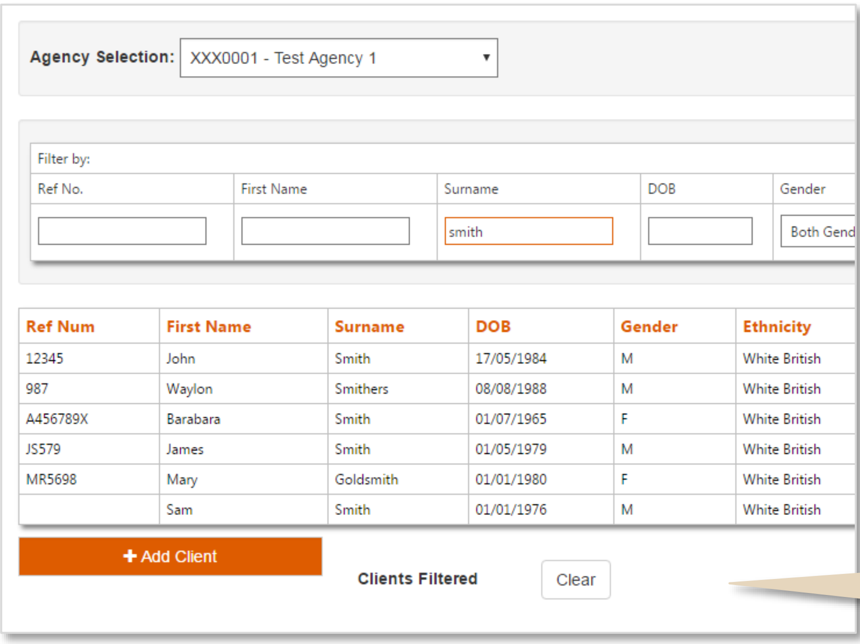
These columns show a count of each activity type. They will only show the activity types for your agency.

Clients are sorted by ref# & name. Click the headings to change the sort order.

The client list shows 10 clients at a time; you can view other pages by clicking on the arrows.

First check if the client already exists, otherwise click to + **Add New Client**

Client List Filter



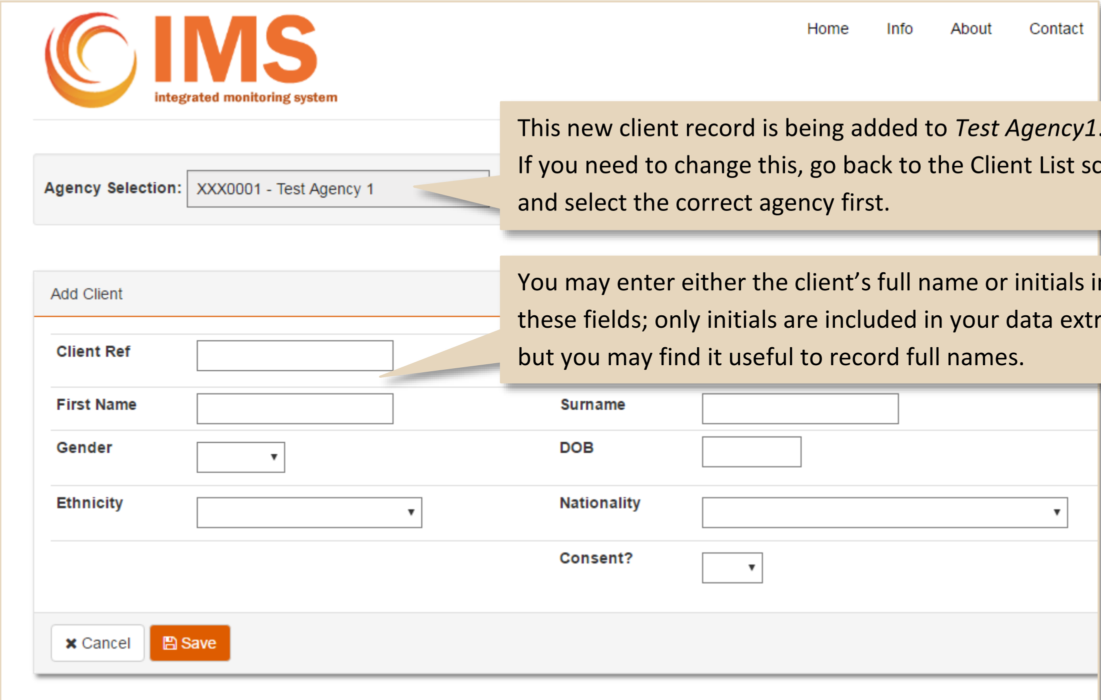
Ref Num	First Name	Surname	DOB	Gender	Ethnicity
12345	John	Smith	17/05/1984	M	White British
987	Waylon	Smithers	08/08/1988	M	White British
A456789X	Barabara	Smith	01/07/1965	F	White British
JS579	James	Smith	01/05/1979	M	White British
MR5698	Mary	Goldsmith	01/01/1980	F	White British
	Sam	Smith	01/01/1976	M	White British

In this example the client list has been filtered for clients with a Surname containing ‘smith’. You can enter search terms in to more than one search box if you need to further filter the number of search results.

When a filter is applied you will see a message and a button to ***Clear*** any filter.

Adding a New Client

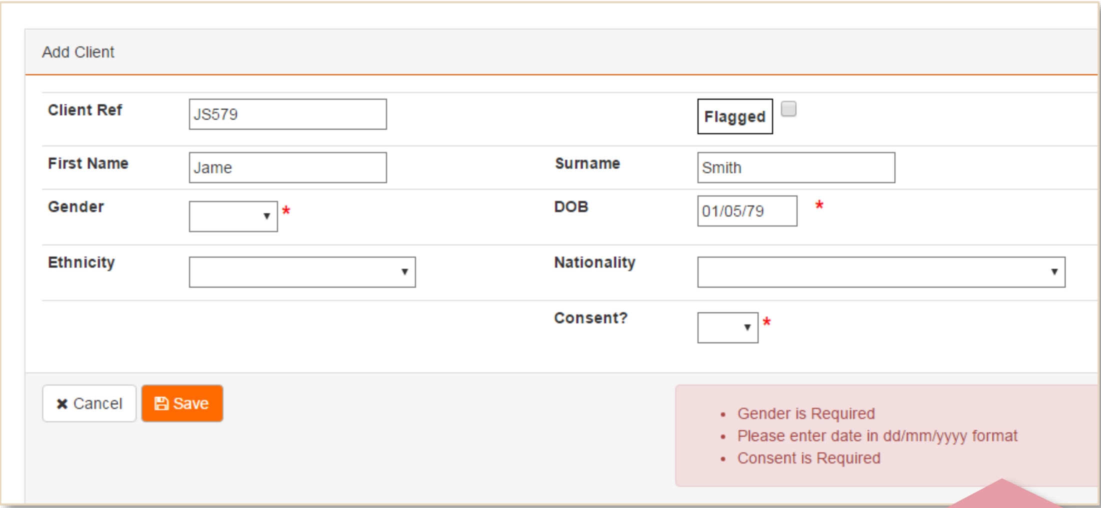
If the client is not already recorded click the orange ***+ Add Client*** button to enter their details and create a new client record as shown here:



This new client record is being added to *Test Agency1*. If you need to change this, go back to the Client List screen and select the correct agency first.

You may enter either the client's full name or initials in these fields; only initials are included in your data extract but you may find it useful to record full names.

Data Validation

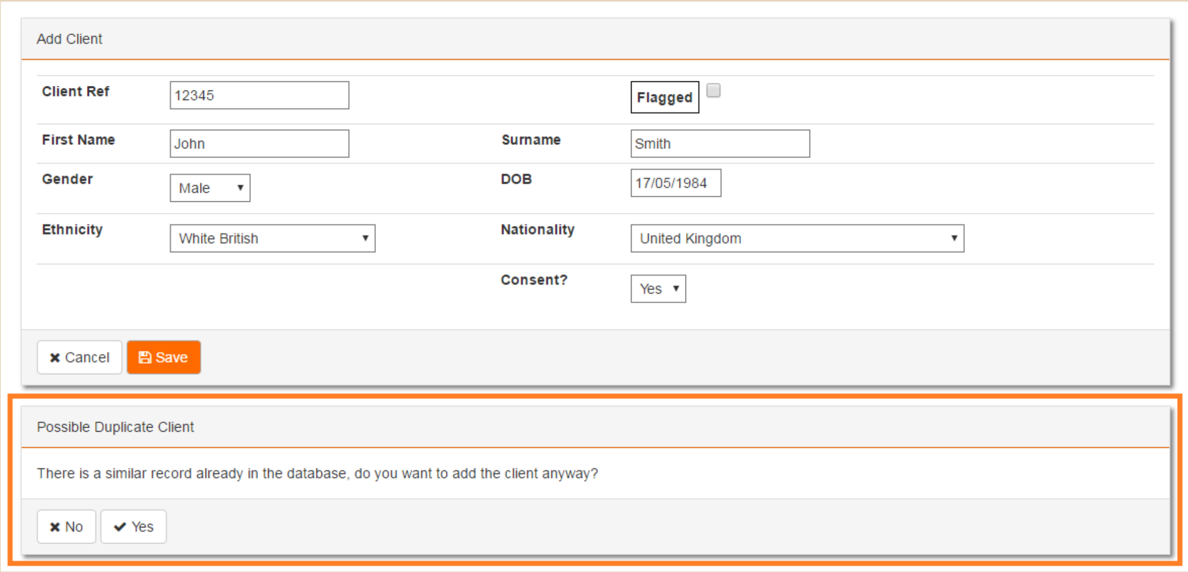


Once you've entered the client information click the ***Save*** button. Any incorrect data or required fields will be shown; the record has not been saved until you correct these and click ***Save*** again.

After successfully adding a new client record you will be taken directly to that new record to enter the client's activity and assessment information.

Duplicate Client Check

You should always check the ***Client List*** screen before adding a new client, but if you attempt to add a new client with the same initials, date of birth, & gender as an existing client, this message will appear:



In this case the client is actually a different person, so simply click ***Yes*** to add the new client. If you're not sure click ***No*** and check the client list screen to make sure the person hasn't already been added.

Data Items – Client Details

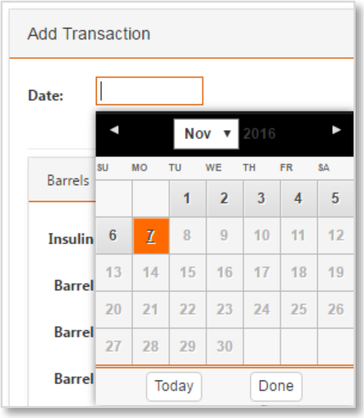
Data Item	Data Definition	Required	Data extract
Client Ref	A reference code used by the agency to identify this client.	Optional	No
First Name	The first name (or just first initial if preferred) of the client.	Required	First letter only
Surname	The surname (or just surname initial if preferred) of the client.	Required	First letter only
Gender	The client's gender at registration with this agency.	Required	Yes
DOB	The client's date of birth.	Required	Yes
Ethnicity	The ethnicity that the client states as defined in the OPCS census categories.	Optional	Yes
Nationality	Country of nationality at birth. Code selected from ISO 3166 Country list.	Optional	Yes
Consent	Whether the client has consented for their data to be shared with LJMU CPH. Any records marked "No Consent" are excluded from all reporting.	Required	Yes
Died	Whether the client has died. This item is not shown when the client record is first added; however it can be seen when viewing an existing client record.	Optional	Yes
Flagged	The "flagged" button allows you to highlight this client, and adds them to the "flagged client report".	Optional	No

Data Entry Tips

Entering Dates

Whenever you click on a '***Date:***' field the date picker tool shown here will appear to make data entry easier.

Alternatively you can type the date directly, but you must use the format: ***"DD / MM / YYYY"***



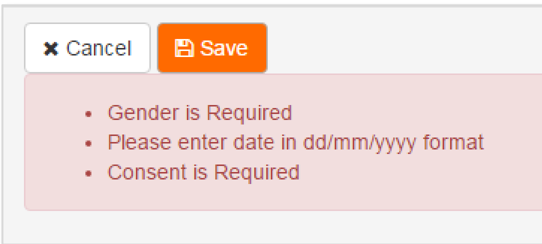
Using the keyboard

If a page has several fields that you need to complete, you may find it quicker to use the 'Tab' key on your keyboard to move the cursor to the next box.

Saving and Validation

When you add new data, or make changes to existing data you must click the orange ***Save*** button; otherwise your changes are not saved.

Clicking the Save button first validates your data for any errors. If any are shown you must correct them first, then click the orange ***Save*** button again before your data is saved.



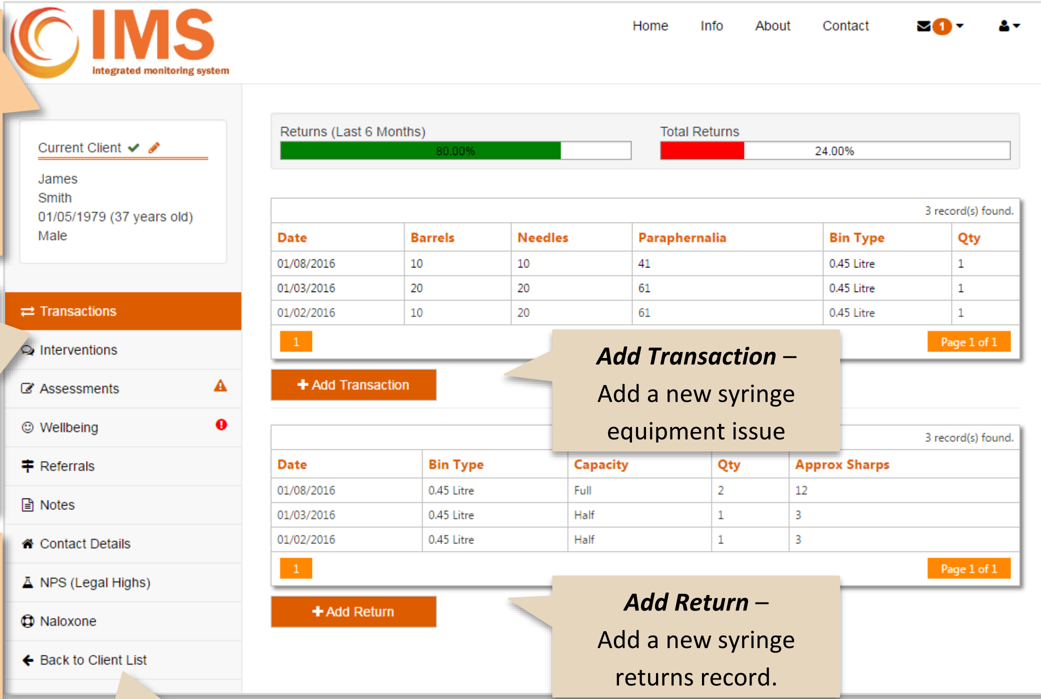
CLIENT ACTIVITY SCREEN

When you click on a client record in the ***Client List screen*** you will see a screen similar to the one shown here. The pages are responsive to your screen size; so the layout may change or stretch if you have a larger or smaller screen.

The current ***client details*** are shown, some of these icons may also appear:
- ✓ 'Consented'
- ✗ 'Non-consenting'
- Alert flag
- Edit client details

IMS 'module' tabs are listed on the left menu. In this example '***Syringe Exchange Transactions'*** has been selected.

These icons may appear next to the ***Assessments*** and ***Wellbeing*** tabs:
- ⚠ Not completed in last 6 months
- ❗ Has never been completed



Add Transaction – Add a new syringe equipment issue

Add Return – Add a new syringe returns record.

Back to Client List - return to the full list of clients.

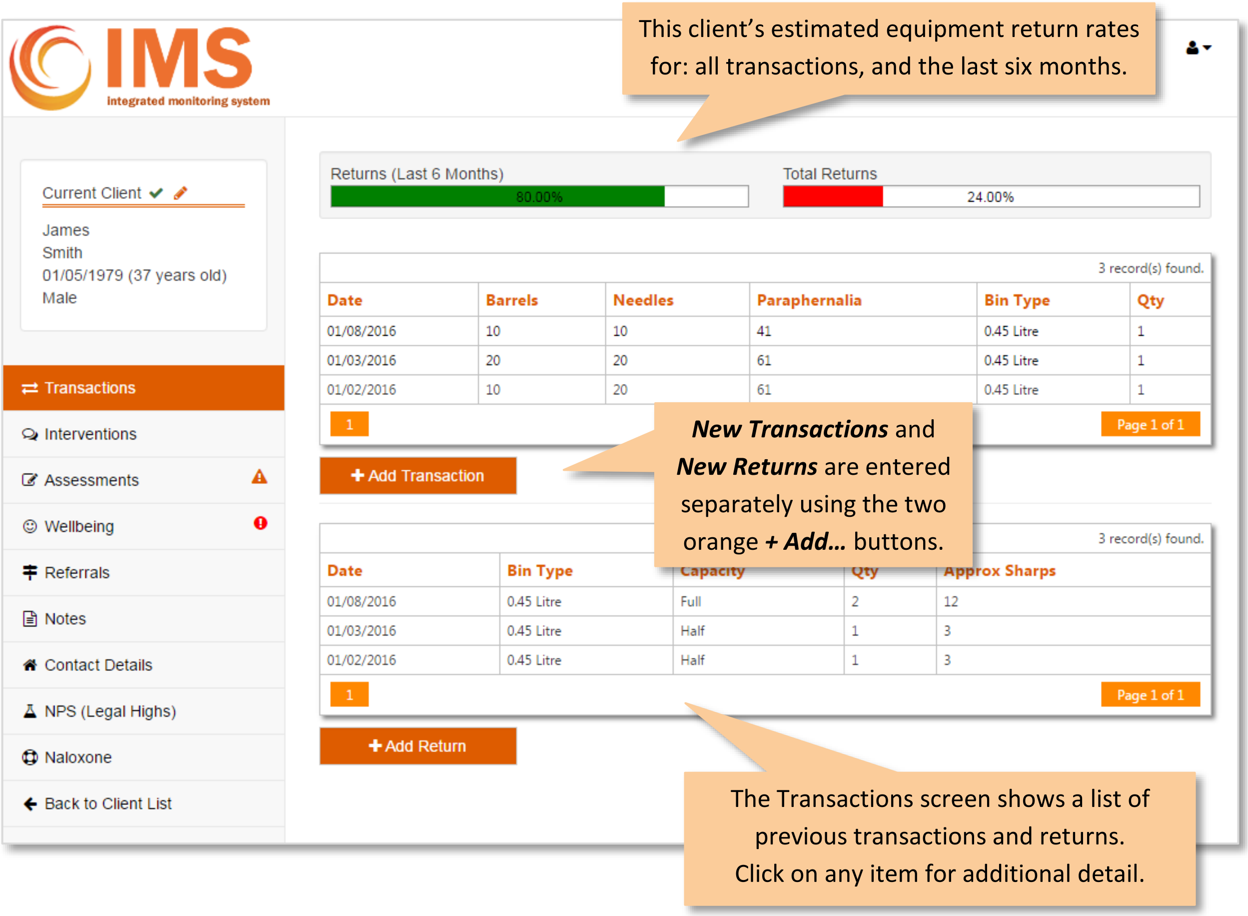
In this example ***Transactions*** has been selected; the client has three previous syringe exchange transactions recorded. Clicking on these records will display more information.

The IMS module tabs displayed will be dependent on the requirements of your treatment service. The table below gives a brief description of the current IMS modules. The data items in each module may contribute to the IMS Core Data Set (CDS), the IMS Supplementary Data Set (SDS), or may be local fields for use by treatment service staff only. This user guide covers the IMS core modules. Separate user guides are available for modules which are part of the IMS SDS.

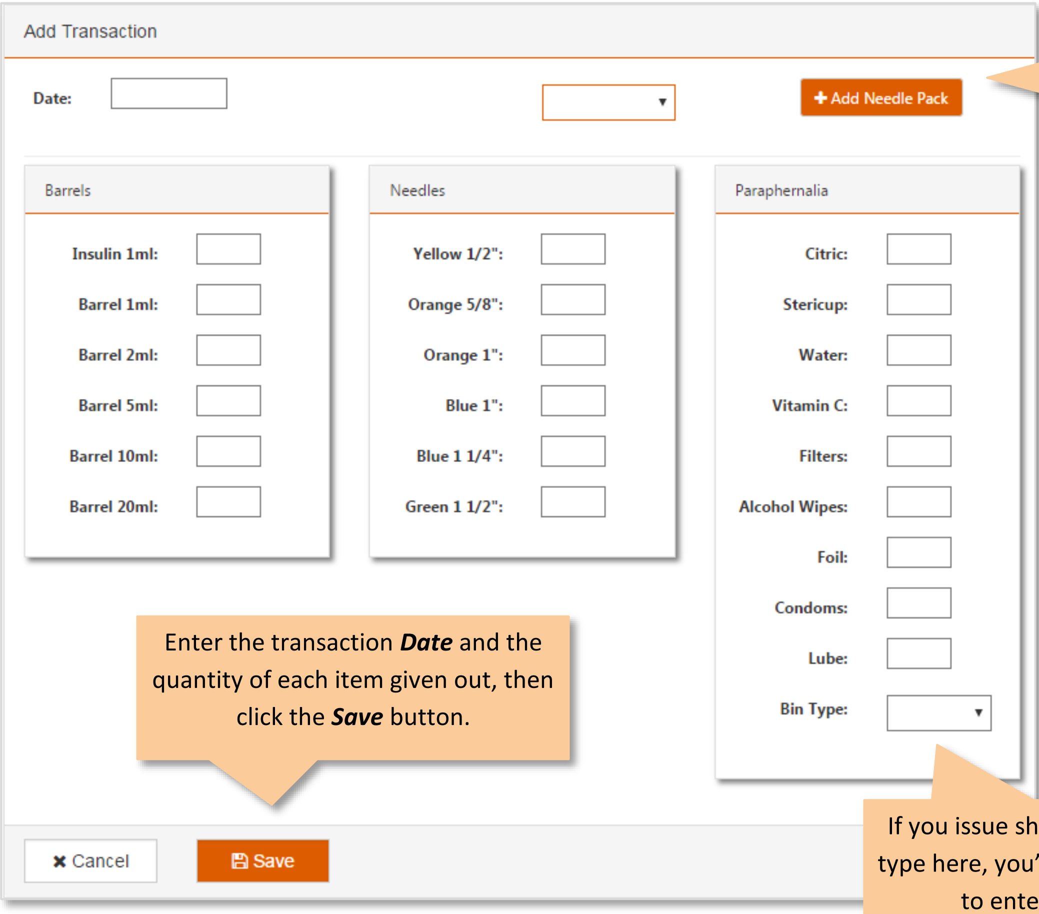
IMS modules	Description	Data Set
Transactions	Syringe exchange transactions and sharps returns.	**CDS**
Interventions	Face to face interventions delivered such as brief intervention.	**CDS**
Assessments	Additional assessment detail including problem substances used.	**CDS**
Wellbeing	Record responses to the seven wellbeing questions.	**CDS**
Referrals	Referrals both "In" to this agency and "Out" to other services.	**CDS**
Notes	Additional client notes.	**Local**
Contact	Contact details for the client, and emergency contact.	**Local**
YP Outcomes	Data items relating to Young People (YP) aged under 18.	**SDS**
NPS (Legal Highs)	NPS (Novel Psychoactive Substances, formerly 'Legal Highs') & other 'club drugs'.	**SDS**
Steroid & IPEDS	Additional assessment items for Steroid and IPED clients.	**SDS**
Naloxone	Recording the distribution of take home Naloxone kits.	**SDS**

TRANSACTIONS

Each individual syringe exchange transaction (equipment issued out) and return transaction is entered into IMS using the screen shown below. The estimated return rates are also shown for this client for all transactions, and just transactions recorded in the previous 6 months.



Adding a New Transaction

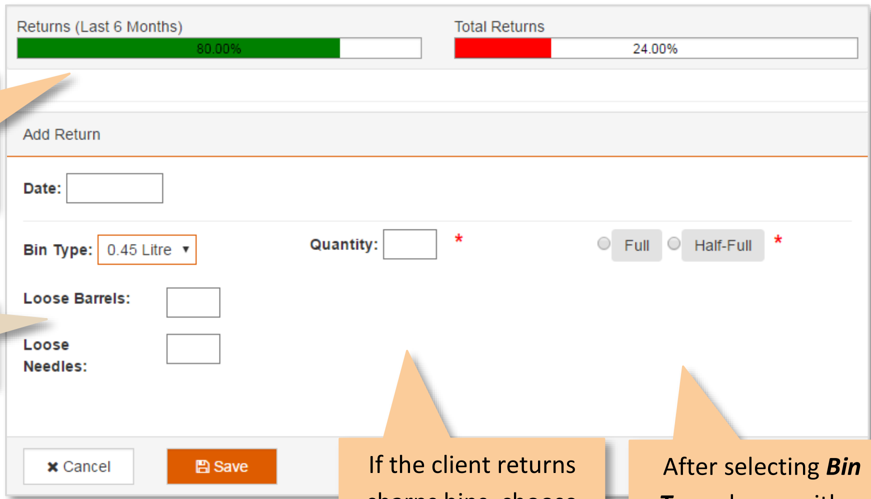


If you issue Needle Packs, you can select them from this list.

Enter the transaction ***Date*** and the quantity of each item given out, then click the ***Save*** button.

If you issue sharps bins select the type here, you'll then be prompted to enter how many.

Adding Equipment Returns



This client's estimated equipment return rates for: all transactions, and the last six months.

If the client returns ***Loose*** equipment record it here.

If the client returns sharps bins, choose ***Bin Type*** then enter the ***Quantity***.

After selecting ***Bin Type*** choose either ***Full*** or ***Half-Full***.

Enter the return ***Date***, select the ***Bin Type*** and enter a ***Quantity*** returned. Remember to click the ***Save*** button.

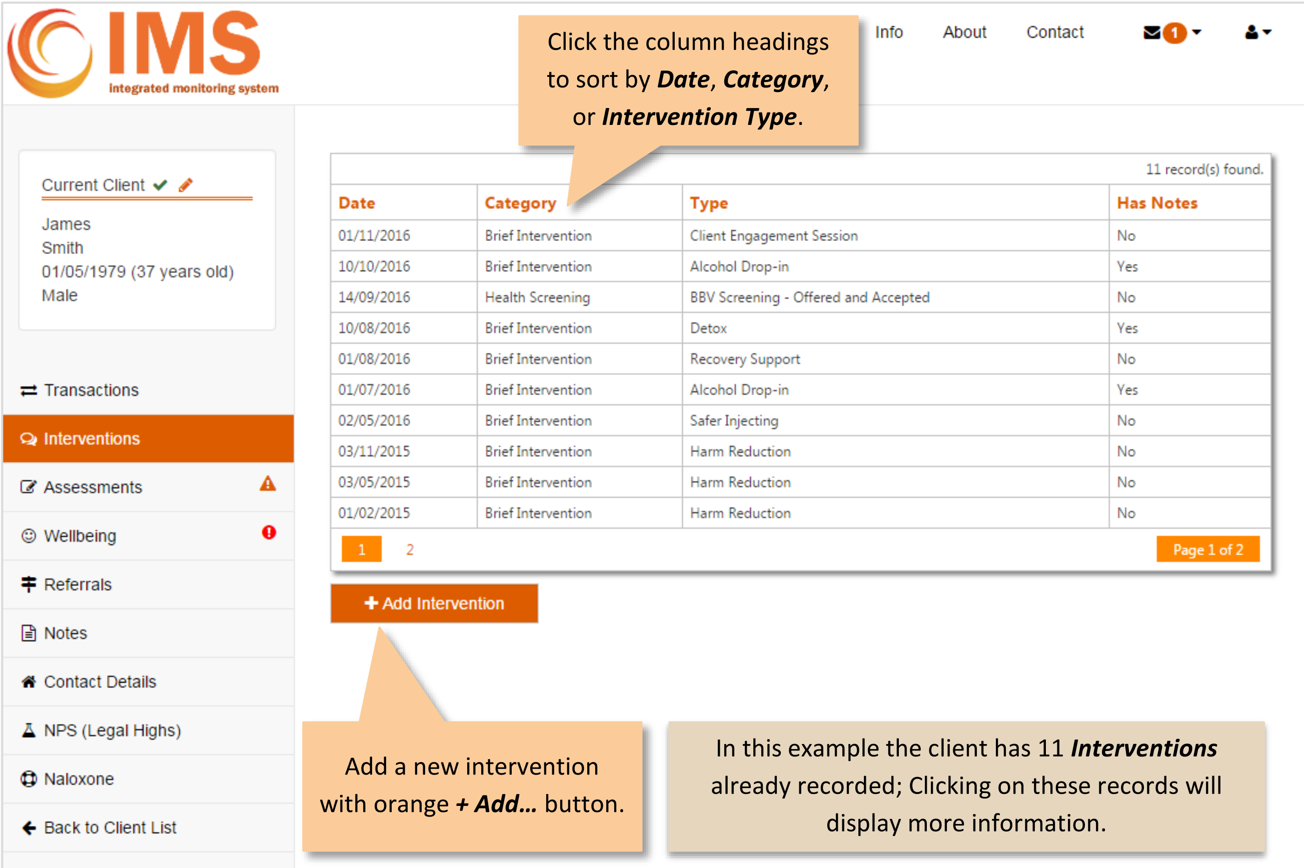
Data Items – Transactions

Data Item	Data Definition	Required	Data extract
Transaction Date	Date of that the syringe exchange transaction took place.	Required	Yes
Insulin 1ml	Number of 1ml Insulin syringes.		Yes
Barrel 1ml	Number of 1ml barrels.		Yes
Barrel 2ml	Number of 2ml barrels.		Yes
Barrel 5ml	Number of 5ml barrels.		Yes
Barrel 10ml	Number of 10ml barrels.		Yes
Barrel 20ml	Number of 20ml barrels.		Yes
Yellow 1/2"	Number of yellow 30 gauge 12mm ½ inch needles.		Yes
Orange 5/8”	Number of orange 25 gauge 16mm 5/8th inch needles.		Yes
Orange 1”	Number of orange 25 gauge 25mm 1 inch needles.		Yes
Blue 1”	Number of blue 23 gauge 25mm 1 inch needles.		Yes
Blue 1 1/4"	Number of blue 23 gauge 30mm 1¼ inch needles.		Yes
Green 1 1/2"	Number of green 21 gauge 40mm 1½ inch needles.		Yes
Citric	Number of citric acid sachets.		Yes
Stericup	Number of Stericup spoons.		Yes
Water	Number of water ampoules.		Yes
Vitamin C	Number of VitC sachets.		Yes
Alcohol Wipes	Number of alcohol swabs or wipes.		Yes
Foil	Number of packs of foil.		Yes
Condoms	Number of condoms (any type).		Yes
Lube	Number of lube sachets.		Yes
Bin Type	The type of sharps bins that are given out to the client *If more than one type, record separately.	Yes, if Bin Qty is entered	Yes
Quantity	The number of sharps bins that are given out.	Yes, if BinType is entered	Yes
Returns Screen			
Return Date	Date of that the sharps return was received.	Required	Yes
Bin Type	Description of any sharps bins that the client returns.	Yes, if Bin Qty is entered	Yes
Quantity	Number of sharps bins that client returns.	Yes, if BinType is entered	Yes
Full/Half-Full	Estimate of the fill level of returned bins.		Yes
Loose Barrels	Number of loose barrels that client returns.		Yes
Loose Needles	Number of loose needles or syringes that client returns.		Yes

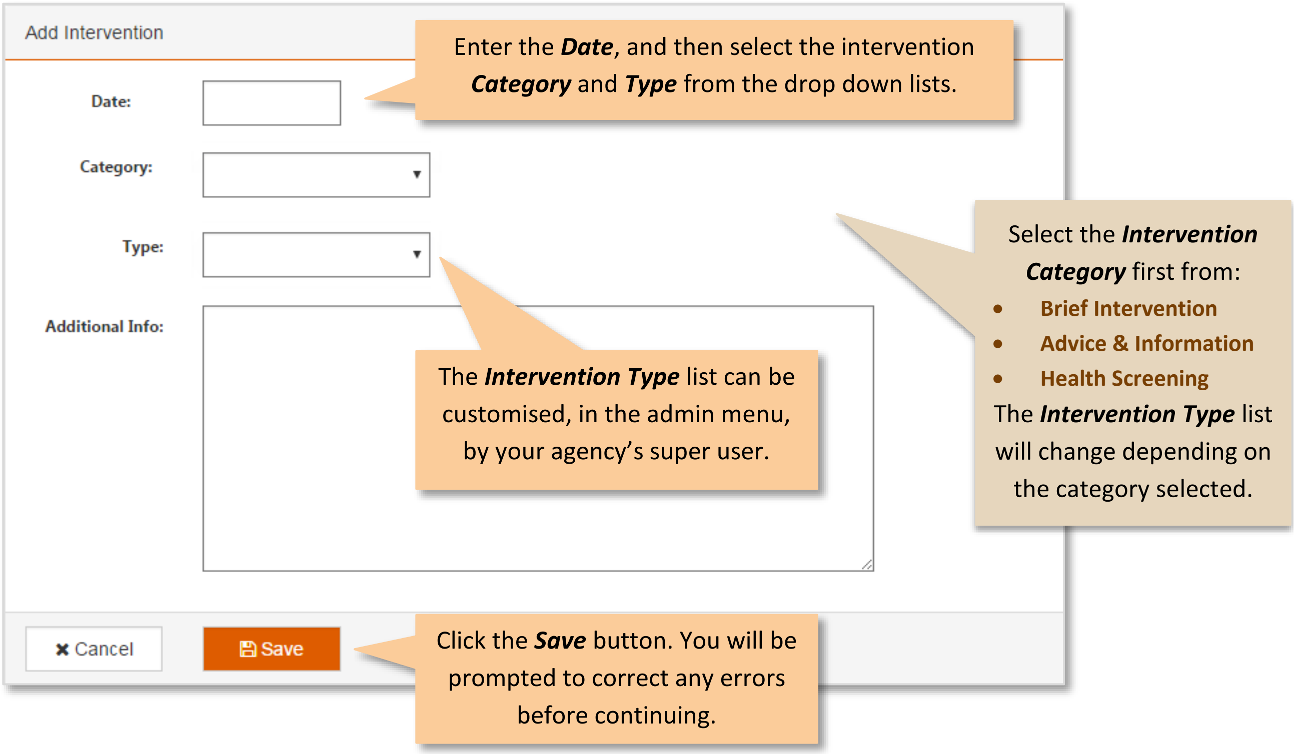
INTERVENTIONS

IMS records each individual face to face intervention by category ***Brief Intervention***, ***Advice and Information (General)***, and ***Health Screening***. These are further broken down by selecting an ***Intervention Type***. The intervention type can be customised to reflect the activities delivered by your treatment service. This allows you to generate your own reports from IMS detailing the number of different interventions delivered for any period of time.

To prevent duplicate records being entered, IMS online will only allow you to enter each intervention type once per day for each client.



Adding a New Intervention



Data Items – Interventions

Data Item	Data Definition	Required	Data extract
Date	Date that this treatment provider completed a face to face intervention with the client.	Required	Yes
Category	The category of intervention, either *Brief Intervention*, *Advice & Information (General)* **or** *Health Screening*.	Required	Yes
Type	Additional detail about the type of intervention. From a list determined by the agency.	Optional	Yes
Additional Info	Any additional notes which are relevant to this intervention.	Optional	No

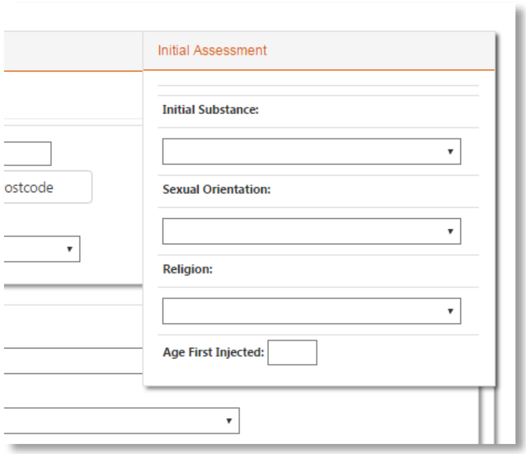
ASSESSMENTS

INITIAL ASSESSMENT WINDOW

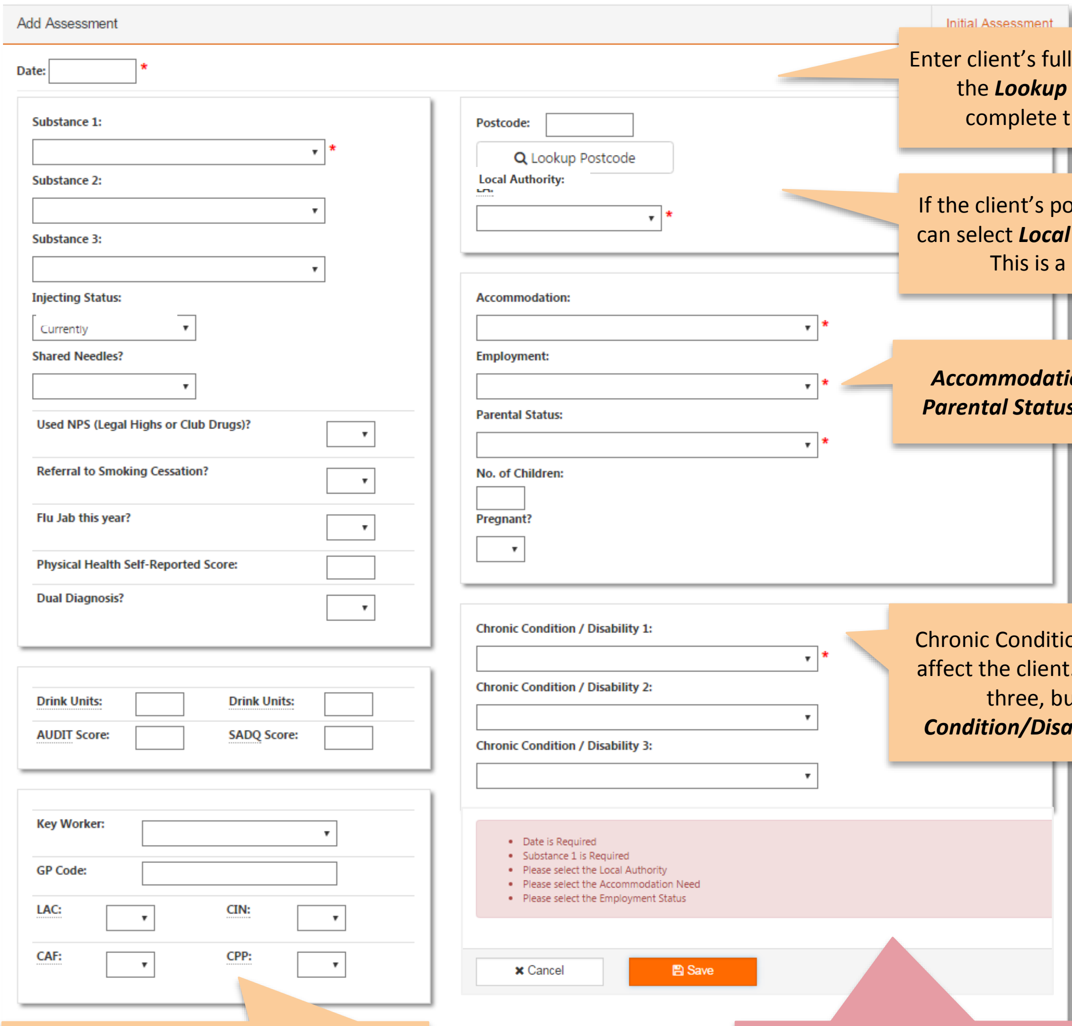
When you enter the first assessment the initial assessment window will open as shown here. This contains data items which are less likely to change.

Clicking the Initial Assessment link will open or close this pop up window.

On subsequent assessments the box will be prepopulated. You can enter new details by clicking the ***New Initial Assessment*** button. The date shown indicates the last time these items were updated; to change it enter the correct date in the main assessment screen.



MAIN ASSESSMENT SCREEN



Enter client's full (or part) postcode, click the ***Lookup Postcode*** button to complete the ***Local Authority***

If the client's postcode isn't known you can select ***Local Authority*** from the list. This is a mandatory field

Accommodation, ***Employment*** and ***Parental Status*** are mandatory fields

Chronic Conditions or Disabilities that affect the client. You may enter up to three, but only ***Chronic Condition/Disability 1*** is mandatory

These fields are only applicable for clients aged under 18:
LAC – Looked after child
CAF – Common Assessment Framework
CIN – Child in Need
CPP – Care Protection Plan

Important:
When you click ***Save*** your data will be validated and any error messages will appear here. You need to correct any errors and click ***Save*** again before continuing.

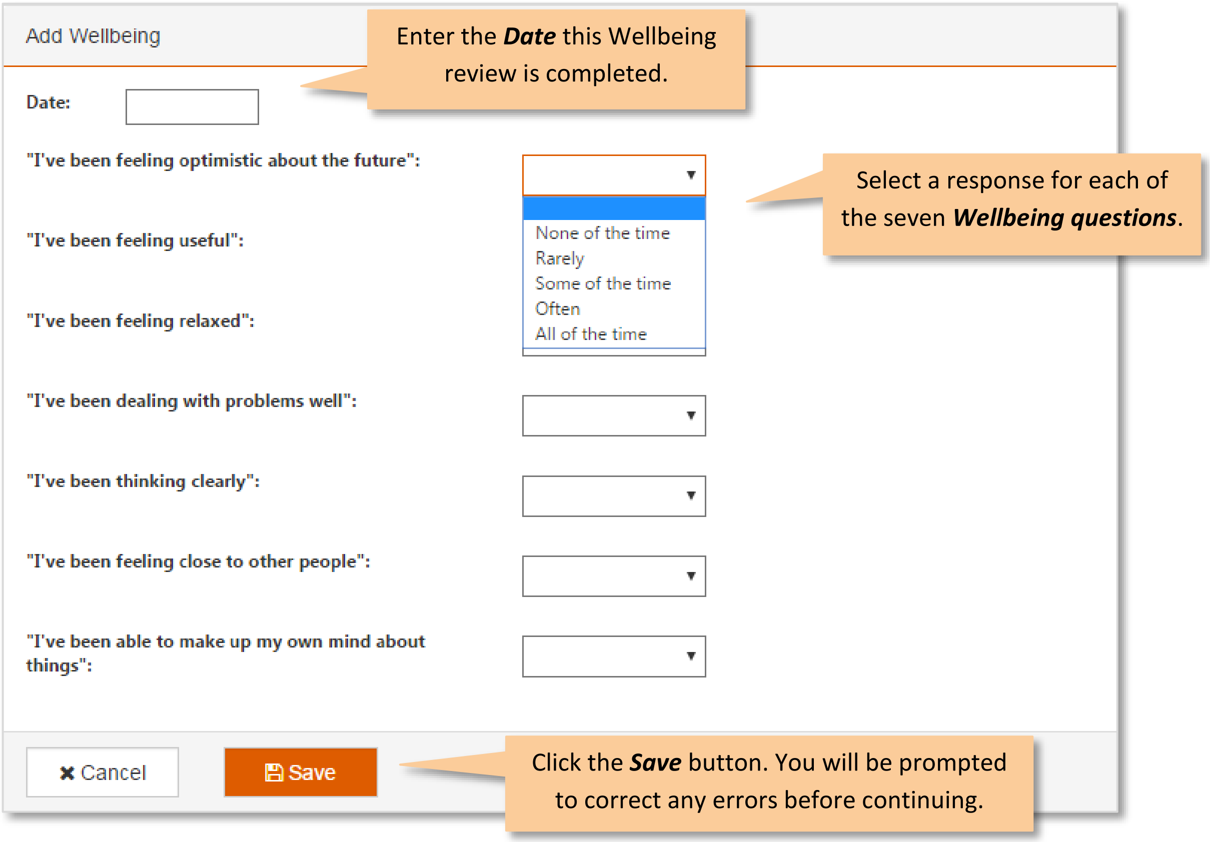
Data Items – Assessments

Data Item	Data Definition	Required	Data Extract
Initial Assessment	Note: Data items in the initial assessment refer to the client's situation when they initially started treatment, these items are not usually expected to change.		
Initial Substance	The substance that the client initially used (or still uses), which caused the client to engage with this treatment service.	Mandatory	Yes
Sexual orientation	The client's stated sexual orientation. ***This is an optional field; for local collection purposes only.***	Optional	Yes
Religion	The client's stated Religion, beliefs, or none. ***This is an optional field; for local collection purposes only.***	Optional	Yes
Age first injected	The age that the client states they first injected. ***Only complete if injecting status is 'currently' or 'previously'.***	Optional	Yes
Main Assessment	Note: All items in the main assessment refer to the client's situation in the **last 14 days**, unless stated otherwise.		
Date	The date that the assessment review was completed.	Mandatory	Yes
Substance 1	Primary problem substance that the client currently uses, or has used in ***the 14 days prior to this assessment.***	Mandatory	Yes
Substance 2	Secondary or additional problem substance that the client currently uses, or has used in ***the 14 days prior to this assessment.***	Optional	Yes
Substance 3	Tertiary or additional problem substance that the client currently uses, or has used in ***the 14 days prior to this assessment.***	Optional	Yes
Injecting Status	Is the client currently injecting, have they ever previously injected or never injected.	Optional	Yes
Shared Needles	If the client is currently or has previously injected have they ever shared / reused needles with others	Optional	Yes
Used NPS	Has the client ***ever*** used Novel Psychoactive Substances – NPS (legal highs) or other 'club drugs'? If yes please also complete the NPS data items module	Optional	Yes
Referral to Smoking Cessation	Has the client been referred to Smoking Cessation services? If yes please also complete a *referral out* to the relevant service provider in the Referrals module	Optional	Yes
Flu Jab this year	Has the client received a flu vaccination this year?	Optional	Yes
Physical Health Score	The client's self-reported physical health as a score between 1 and 20.	Optional	Yes
Dual Diagnosis?	Client has a dual diagnosis, Yes/No ***Only complete if known.***	Optional	Yes
Drink Days	Number of days in ***the 14 days prior to this assessment*** that the client consumed alcohol.	Optional	Yes
Drink Units	Typical number of units consumed on a drinking day.	Optional	Yes
AUDIT Score	AUDIT - Alcohol Use Disorders Identification Test Numeric score between 0 and 40.	Optional	Yes
SADQ Score	SADQ - Severity of Alcohol Dependence Questionnaire Numeric score between 0 and 60.	Optional	Yes
Key Worker	The client's current named key worker. ***This is an optional field; which allows you to generate key-worker reports.*** ***Key workers can be added in the user admin screens.***	Optional	No
GP Code	The GP code may be provided if available.	Optional	Yes
Postcode	The postcode of the client's normal place of residence.	Optional	First part +1 only
Local Authority	The local authority in which the client currently resides, as defined by their postcode of residence. If NFA the LA of the treatment provider should be used.	Mandatory	Yes
Accommodation	Accommodation status of this client ***during the 14 days prior to this assessment***.	Mandatory	Yes
Employment	Main employment or income source of this client ***during the 14 days prior to this assessment.***	Mandatory	Yes

Parental Status	Whether the client is a parent of children under 18, and whether they live with the client.	Mandatory	Yes
Number of Children	The number of children under 18 that live in the same household as the client at least one night a week. The client does not necessarily need to have parental responsibility for the children.	Optional	Yes
Pregnant?	Whether the client is currently pregnant; this field is not displayed if the client gender is recorded "male".	Optional	Yes
Chronic Condition / Disability 1:	Select Main/Primary Chronic Condition / Disability description from list, if not applicable select 'None' or 'Not Stated' if this is unknown or has not been asked	Mandatory	Yes
Chronic Condition / Disability 1:	Select Secondary Chronic Condition / Disability description from list	Optional	Yes
Chronic Condition / Disability 1:	Select Third Chronic Condition / Disability description from list	Optional	Yes
Young Person Data items	These data items are only applicable for clients aged under 18		
LAC – Looked after Child	Arrangements for the child have been determined following statutory intervention and care proceedings under the Children Act 1989	Optional	Yes
CAF – Common Assessment Framework	Has the young person been assessed using the Common Assessment Framework	Optional	Yes
CIN – Child In Need	The needs of the child and family have been assessed by a social worker and services are being provided by the local authority under Section 17 of the Children Act 1989.	Optional	Yes
CPP – Child Protection Plan	A social worker has led enquiries under Section 47 of the Children Act 1989. A child protection conference has determined that the child remains at continuing risk of 'significant harm' and a multi-agency child protection plan has been formulated to protect the child.	Optional	Yes

Removed Fields	The following fields were part of IMS CSD.1.0 and have been removed		
Referral Source	The referral source should be recorded for each client in the *Referrals module*, with the referral status "IN" to signify this as an inward referral.	Removed	No
DAT	The DAT value is not needed, this may be derived from the *Local Authority* or Client postcode value where required.	Removed	No
Disability	The disability field has been replaced by an expanded *Chronic Condition / Disability* list.	Removed	No

WELLBEING



Data Items – Wellbeing

Data Item	Data Definition	Required	Data Extract
Date	Date that the wellbeing review was completed.	Required	Yes
Wellbeing Q1	"I've been feeling optimistic about the future"	Required	Yes
Wellbeing Q2	"I've been feeling useful:"	Required	Yes
Wellbeing Q3	"I've been feeling relaxed:"	Required	Yes
Wellbeing Q4	"I've been dealing with problems well:"	Required	Yes
Wellbeing Q5	"I've been thinking clearly:"	Required	Yes
Wellbeing Q6	"I've been feeling close to other people:"	Required	Yes
Wellbeing Q7	"I've been able to make up my own mind about things:"	Required	Yes

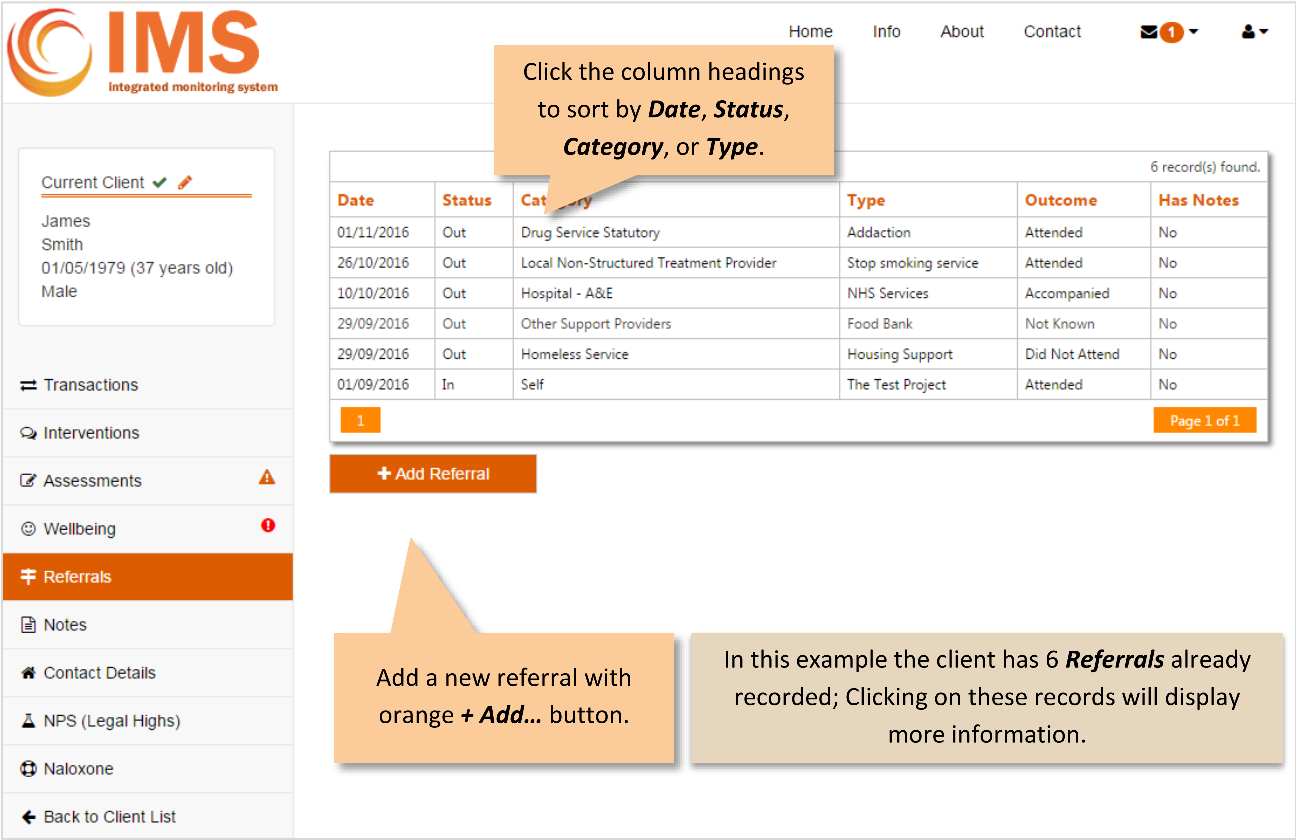
The permissible responses for the Warwick-Edinburgh Mental Well-Being Scale[1] are:

- **None of the time**
- **Rarely**
- **Some of the time**
- **Often**
- **All of the time**

[1] The Warwick-Edinburgh Mental Well-being Scale was funded by the Scottish Government National Programme for Improving Mental Health and Well-being, commissioned by NHS Health Scotland, developed by the University of Warwick and the University of Edinburgh, and is jointly owned by NHS Health Scotland, the University of Warwick and the University of Edinburgh.

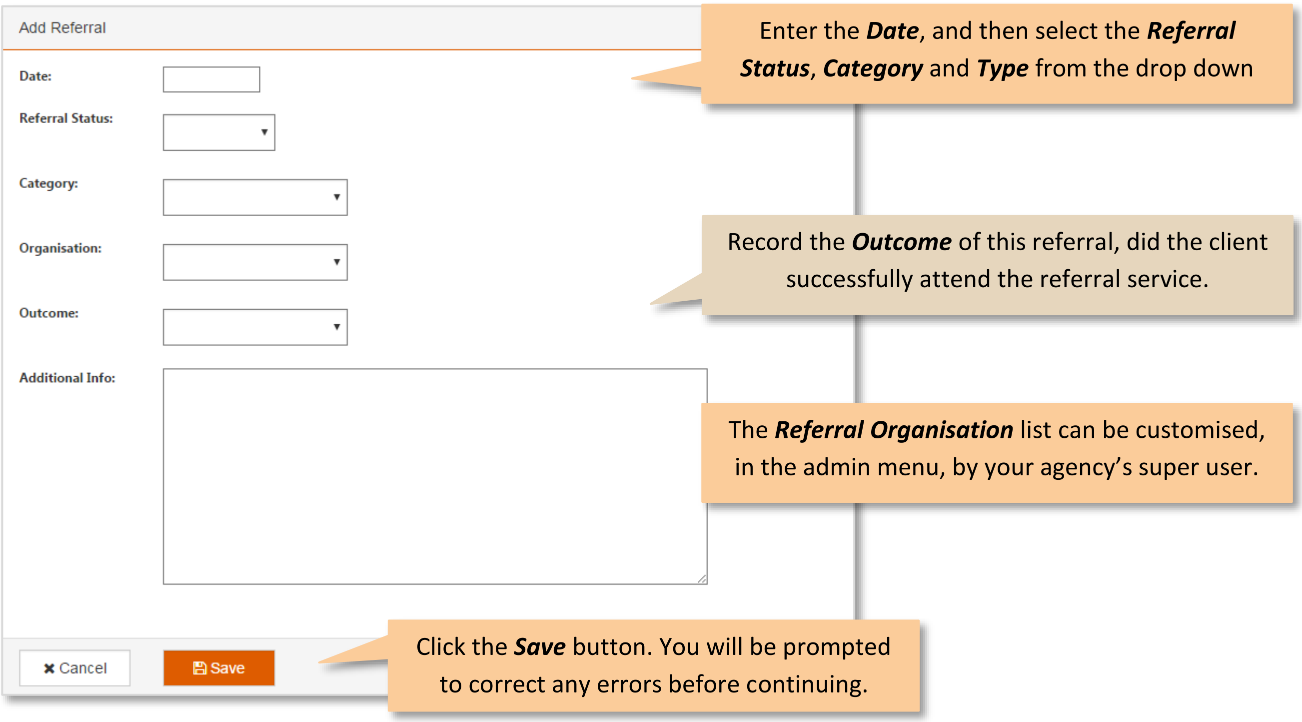
REFERRALS

Both referrals ***'IN'*** to your service (including self-referrals), and 'onward' referrals ***'OUT'*** to other organisations and service providers are recorded in the ***Referrals page***.



Date	Status	Category	Type	Outcome	Has Notes
01/11/2016	Out	Drug Service Statutory	Addaction	Attended	No
26/10/2016	Out	Local Non-Structured Treatment Provider	Stop smoking service	Attended	No
10/10/2016	Out	Hospital - A&E	NHS Services	Accompanied	No
29/09/2016	Out	Other Support Providers	Food Bank	Not Known	No
29/09/2016	Out	Homeless Service	Housing Support	Did Not Attend	No
01/09/2016	In	Self	The Test Project	Attended	No

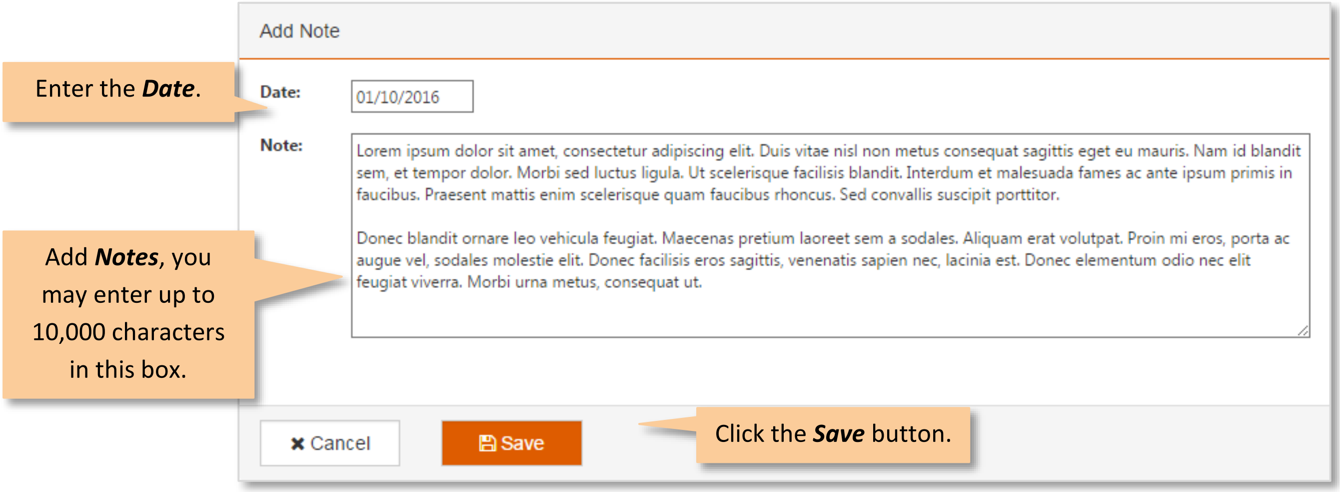
Adding a New Referral



Data Items – Referrals

Data Item	Data Definition	Required	Data Extract
Date	Date that the client was referred to or from an external organisation	Required	Yes
Referral Status	In / Out: whether the referral was 'in' to the agency from another source, or 'out' as a referral by the current agency to another treatment service	Required	Yes
Category	Category of the referral that was made, selected from the reference data list	Required	Yes
Organisation	Additional detail about the type of referral or name of service. From a list determined by the agency.	Optional	Yes
Outcome	The outcome of the referral; did the client attend?	Optional	Yes
Additional Info	Any additional notes which are relevant to this intervention.	Optional	No

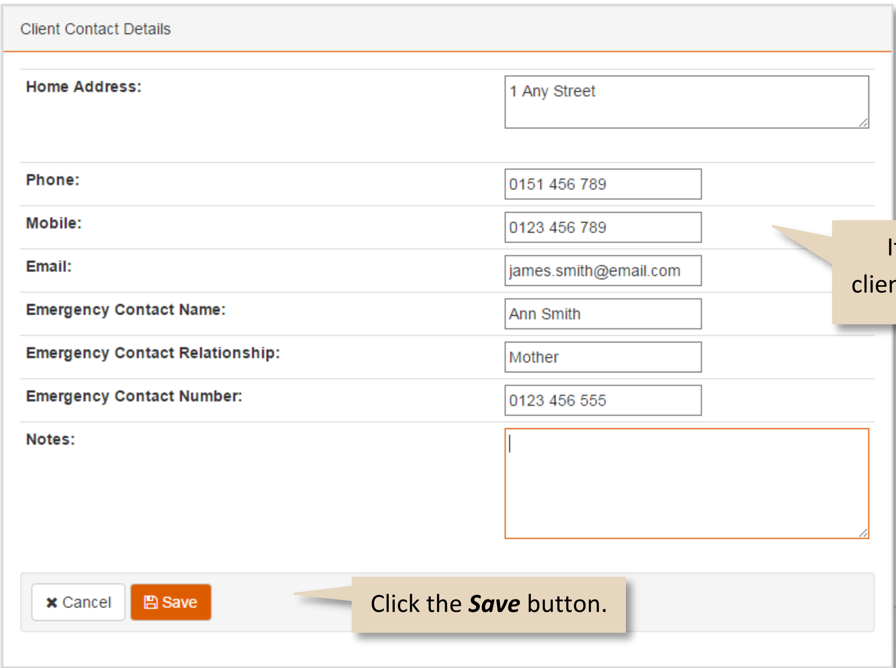
NOTES



Any additional details recorded in this notes section are for the use of the agency only, and are not included in any extracted data.

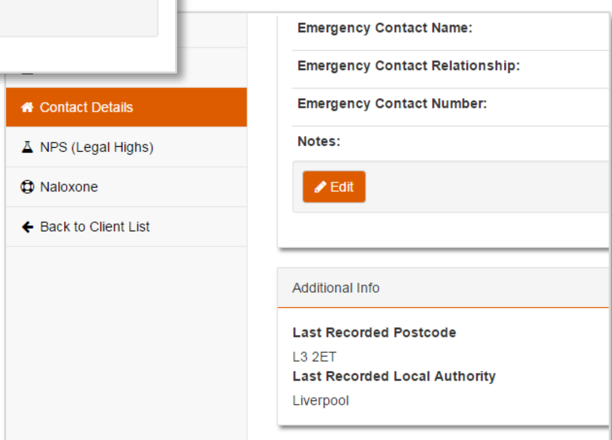
CONTACT DETAILS

Client contact details are optional depending on the agency's requirements; these details are not included in any extracted data.



Additional Info

Postcode and Local Authority are shown for information, but are not recorded here; these items are entered in the client assessment screen.

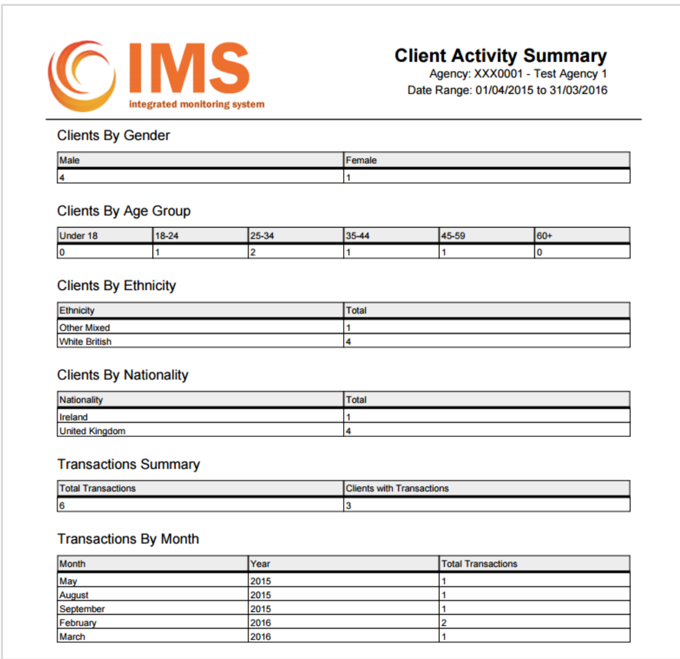


REPORTS

The ***View Reports*** option allows you to generate your own reports. The start and end dates will default to the current year to date, but you can select any period of time, for your agency name, and the report you require.

Choose Output Type you require from either ***On Screen*** or ***PDF*** report.

A list of the all the agency and client detail reports available within IMS, together with a description of each report content is available in ***Appendix A*** & ***Appendix B*** of this user guide.



Client Activity Summary
Agency: XXX0001 - Test Agency 1
Date Range: 01/04/2015 to 31/03/2016

Clients By Gender

Male	Female
4	1

Clients By Age Group

Under 18	18-24	25-34	35-44	45-59	60+
0	1	2	1	1	0

Clients By Ethnicity

Ethnicity	Total
Other Mixed	1
White British	4

Clients By Nationality

Nationality	Total
Ireland	1
United Kingdom	4

Transactions Summary

Total Transactions	Clients with Transactions
6	3

Transactions By Month

Month	Year	Total Transactions
May	2015	1
August	2015	1
September	2015	1
February	2016	2
March	2016	1

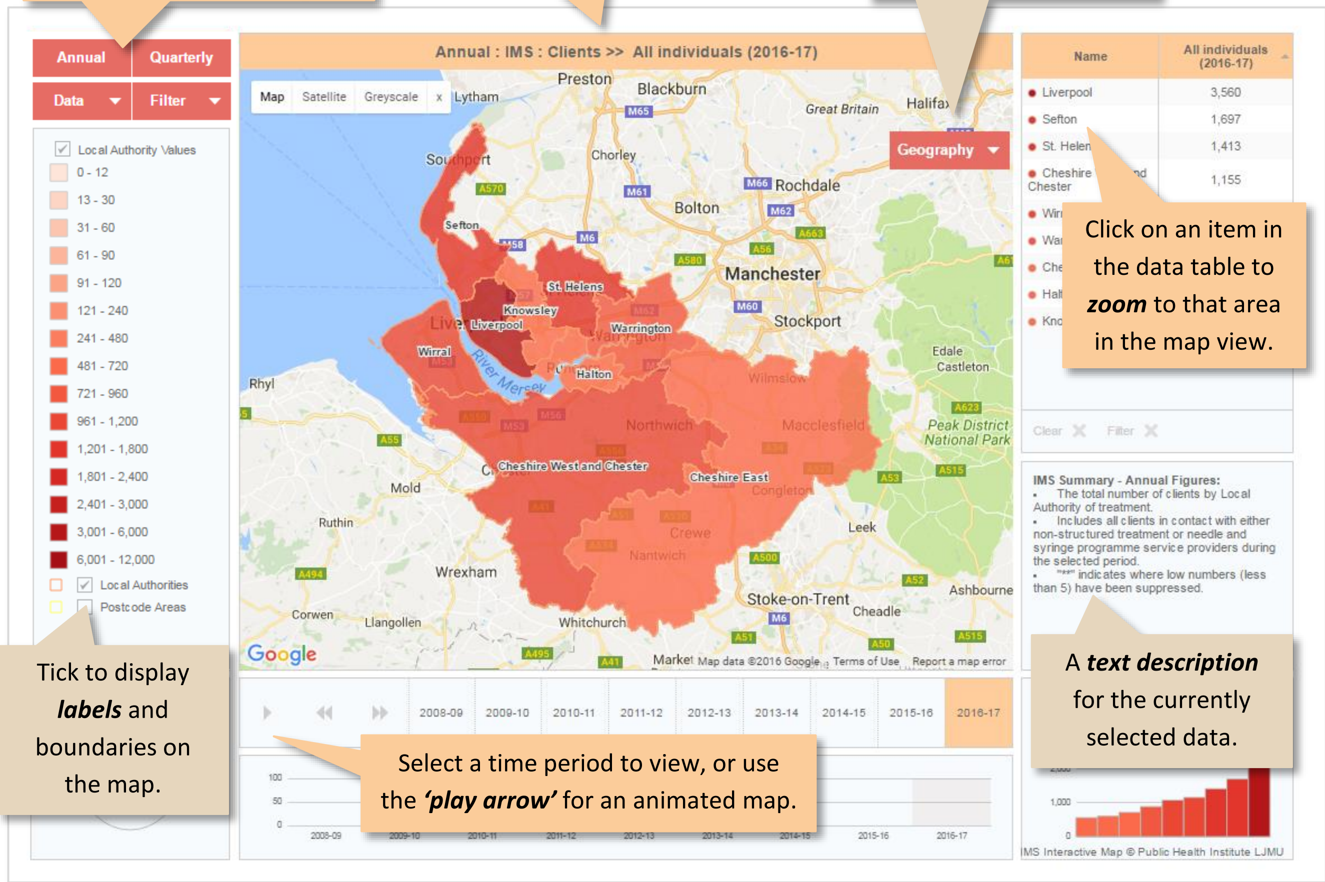
INTERACTIVE MAPS

Interactive maps use a snap shot of IMS data taken weekly. This shows both annual and quarterly figures which can be displayed by local authority area of treatment service, or by postcode area of residence.

Choose ***Annual*** or ***Quarterly*** and select a measure in the ***Data*** menu e.g. *Clients, Substance* or *Activity.*

The ***map title*** bar shows which data is currently selected.

Use the ***Geography Menu*** to drill down to postcode area.

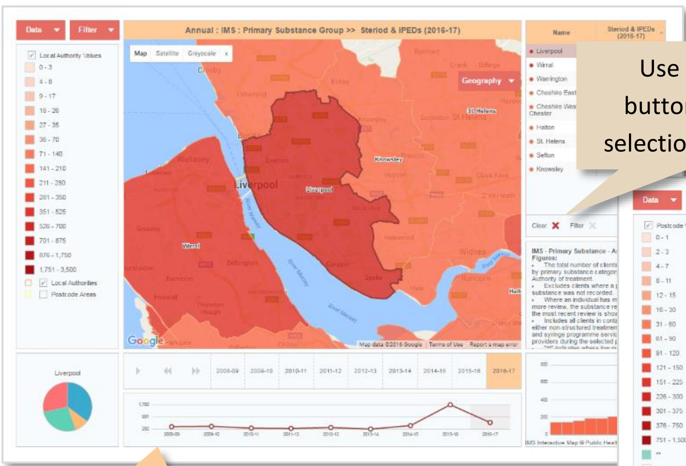


Click on an item in the data table to ***zoom*** to that area in the map view.

Tick to display ***labels*** and boundaries on the map.

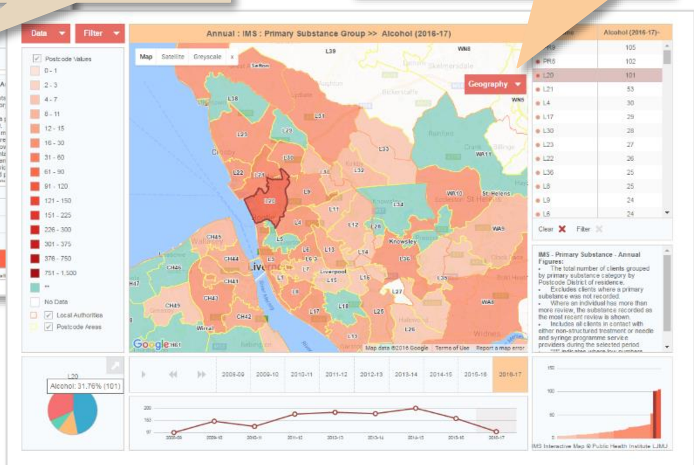
Select a time period to view, or use the ***'play arrow'*** for an animated map.

A ***text description*** for the currently selected data.



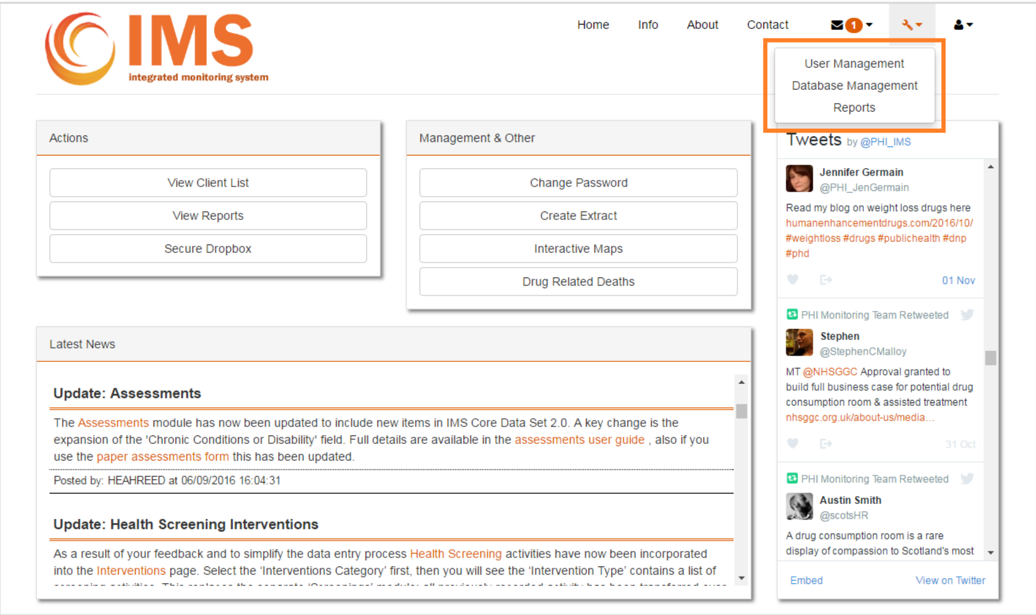
Use the clear buttons to clear selections or filters.

Use the geography menu to switch between different maps.



The graphs and pie chart will update when an area is selected.

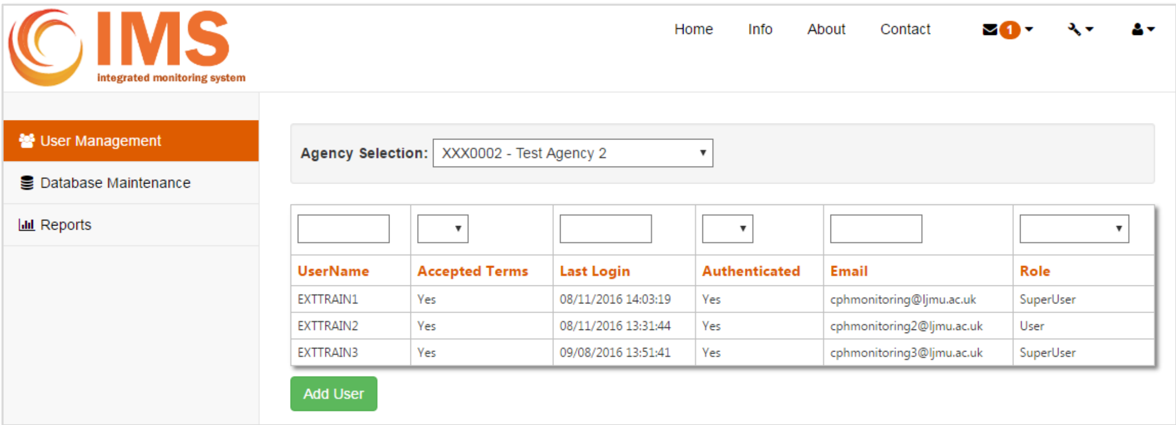
AGENCY ADMIN

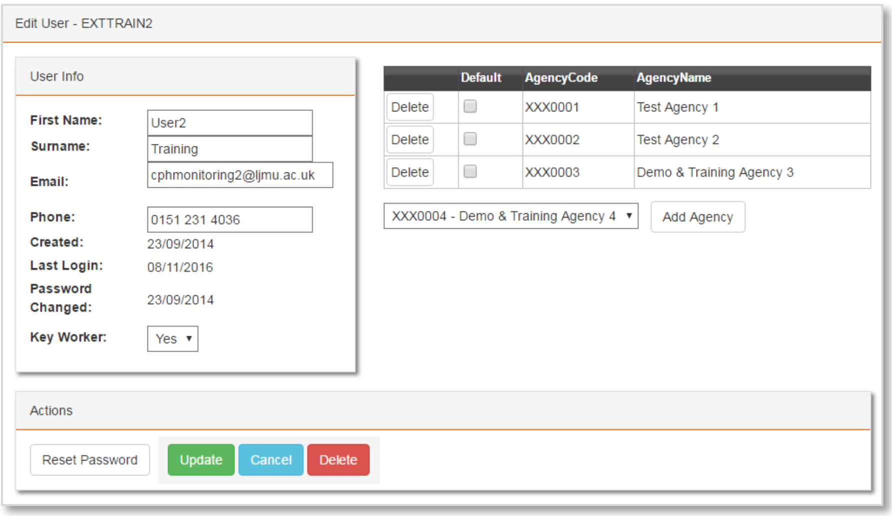


The agency admin options are only available for ***SuperUser*** accounts. If you have this role you will see an additional menu when clicking on the ***spanner icon*** at the top of your screen.

User Admin

The ***User Admin*** screen displays all users for your agency; you may update users or add additional users.

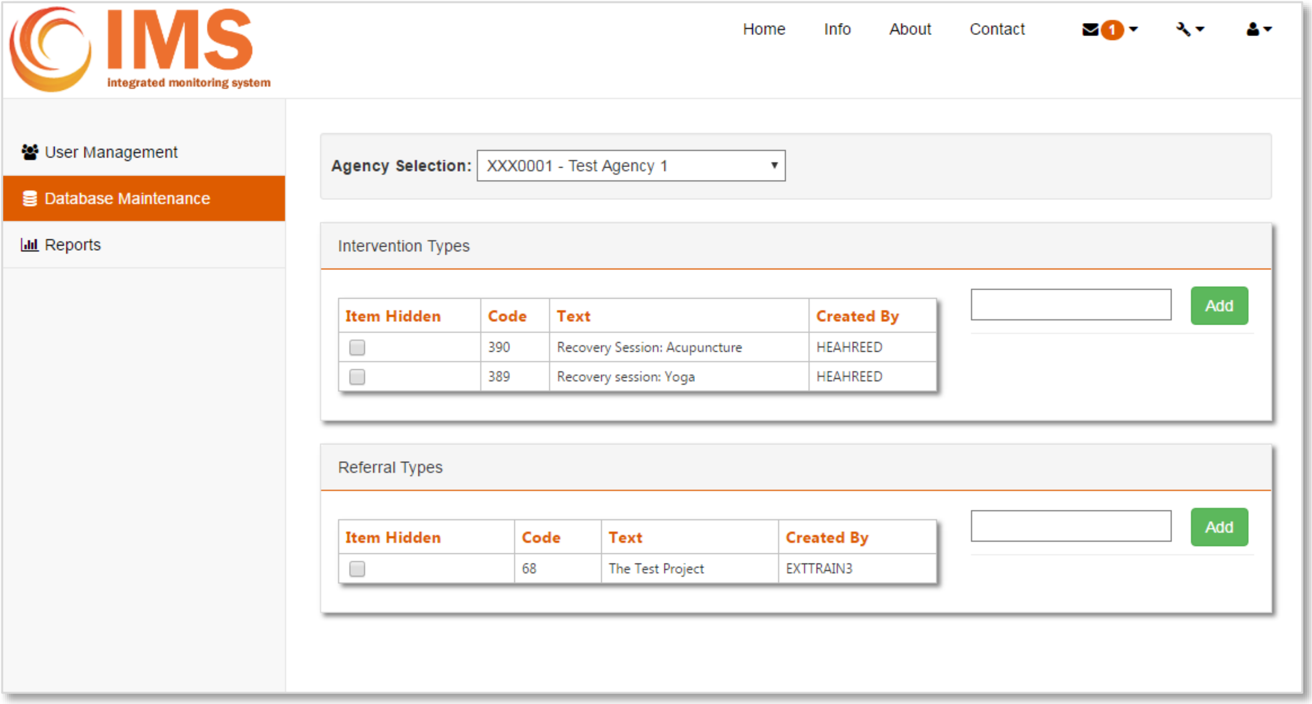




Click on a user record to edit that user's details; this screen also allows you to add key workers, reset passwords and unlock user accounts.

Database Maintenance

The Database Maintenance screen allows you to add additional ***Intervention Types*** and ***Referral Types*** which are specific to your agency.



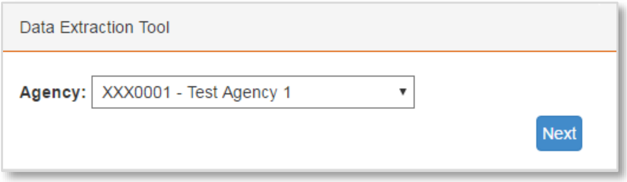
Enter either an Intervention or Referral text description and click ***Add.***

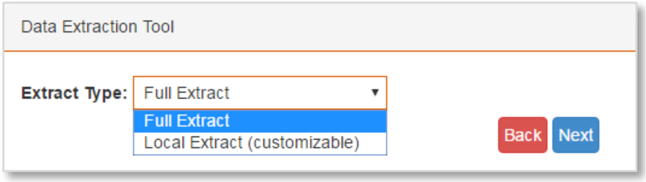
To hide an item tick the ***"Item Hidden"*** box and it will no longer appear in the relevant screens. It's not possible to delete items as they may already have been used to record activity attached to individual client records.

Create Data Extract

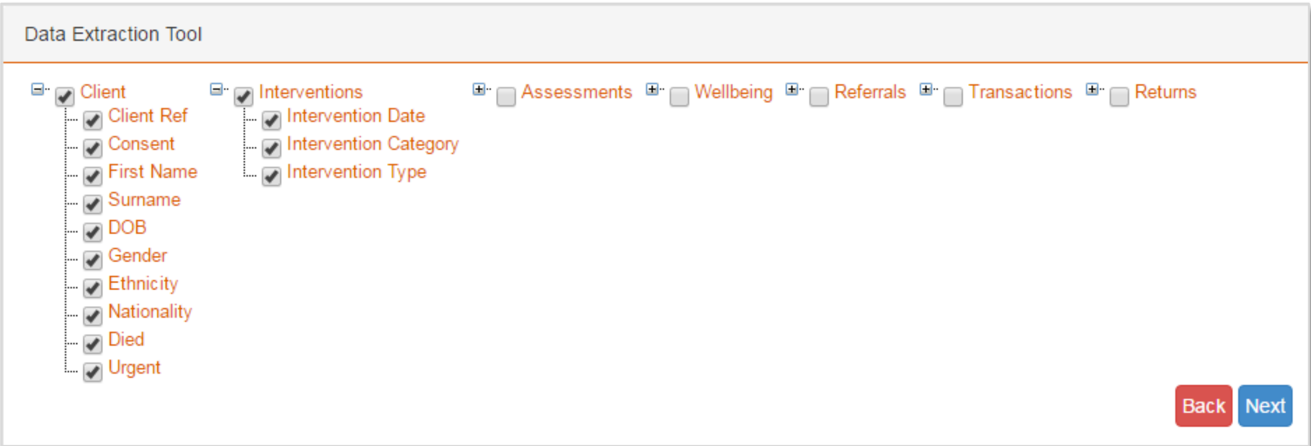
Super users also have the option to create a data extract. This is a snap shot of your data which you can use for your own analysis and reports.

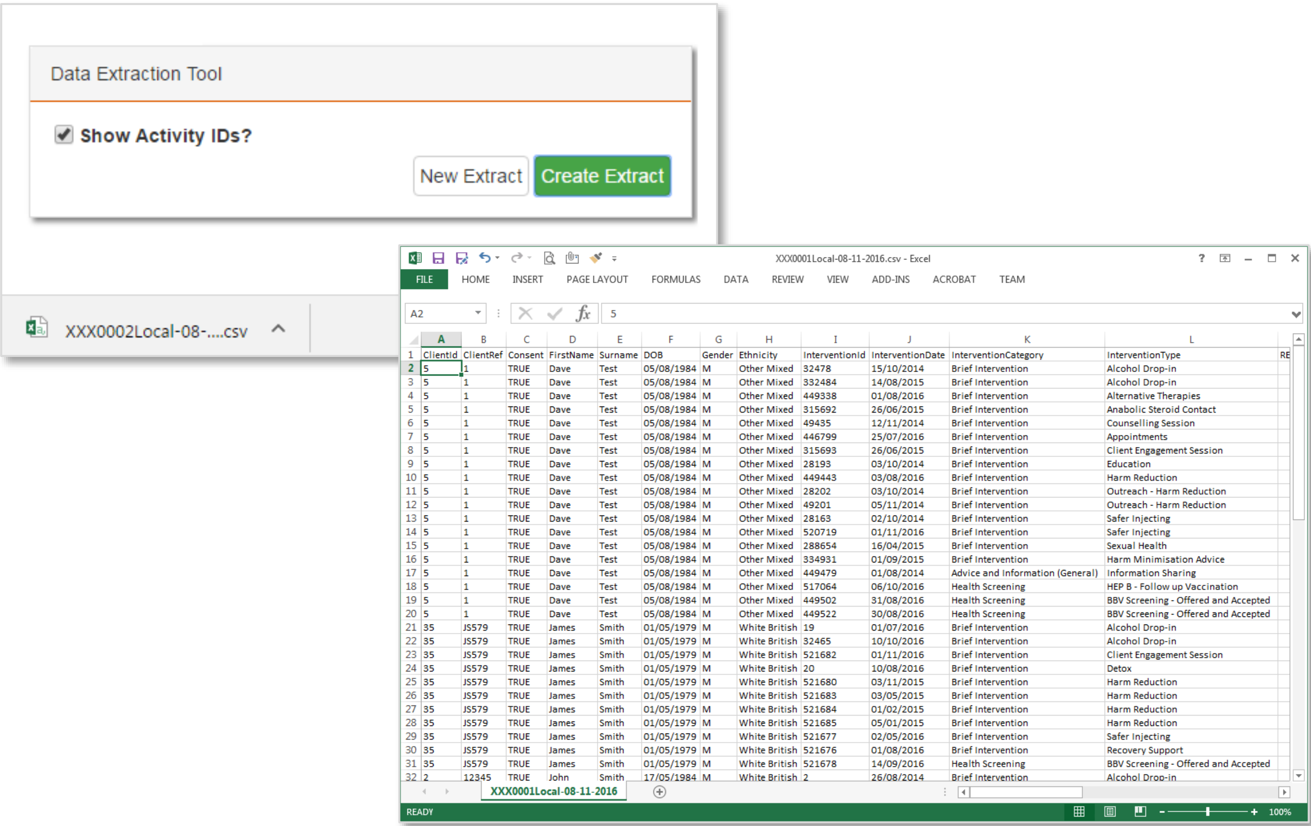
Click the ***Create Extract*** button on the IMS home screen menu, then follow the data extract instructions. Select your agency name, and the type of extract: A ***Full Extract*** is a standard IMS extract using reference codes for data items, a ***Local Extract*** uses easy to read names and descriptions where applicable and can be customised to your requirements.





When creating a ***Local Extract*** you will be asked to select with data items you want to extract.





ADDITIONAL INFORMATION

Appendix A: Agency Reports

Common to all reports…

User selected date parameters (defaults as today and April 1st)

User selected agency – either one agency, or all agencies (where applicable)

Options to filter reports by key worker name. All reports exclude no consent clients.

CLIENT ACTIVITY SUMMARY REPORT

Clients who have any one of the following activities recorded during the date period selected:
Transaction / Intervention / Assessment / Wellbeing / Referral / Screening

- **Demographic breakdown** clients by
    - Gender, Age group, Ethnicity, Nationality
- **Summary of activity delivered**
    - Transactions, Interventions, Assessments, Wellbeing, Referrals
- **Activity delivered by month**

TRANSACTION REPORT

- **Transaction Summary info**
    - Total number of transactions, total number of clients
    - Totals for Barrels / Needles / Paraphernalia
- **Full Transaction info**
    - Breakdown of equipment types
- **Transactions and returns by Month**

INTERVENTIONS REPORT

- **Interventions Summary**
    - Total number of interventions, total number of clients
    - Totals by category
- **Interventions detail**
    - Breakdown by interventions type
- **Interventions by month**

ASSESSMENTS REPORT

- **Assessments Summary**
    - Total number of assessments, total number of clients
- **Assessments detail**
    - Primary substance recorded, employment Status, accommodation Status, local authority of residence
- **Assessments by month**

WELLBEING REPORT

- **Wellbeing Summary**
    - Total number of wellbeing, total number of clients
- **Wellbeing Detail**
    - WB Q1-7 against number of scores 1-5
- **Wellbeing by month**
-

REFERRALS REPORT

- **Referrals Summary**
  - Total number of referrals, total number of clients
- **Referrals Detail**
  - Number of referrals by category - and in or out
  - Number of referrals by Type – and in or out
  - Number of referrals by outcome
- **Referrals by month**

Appendix B: Client Reports

AGENCY CLIENT LIST REPORT

- **Clients summary**
  - Total number of clients
- **Clients detail**
  - **List of clients with Full name / DOB / Gender / Key worker**
  - **Number of each of the following the client has received**
    - Transactions, Interventions, Assessments, Wellbeing, Referrals

FLAGGED CLIENT REPORT

Only includes clients with "Urgent Flag" checked.

- **Clients summary**
  - Total number of clients
- **Clients detail**
  - **List of clients with Full name / DOB / Gender / Key worker**

NO CONSENT REPORT

Only includes clients recorded as "no consent".

- **Clients summary**
  - Total number of clients
- **Clients detail**
  - **List of clients with Full name / DOB / Gender / Key worker**
  - **Number of each of the following the client has received**
    - Transaction, Interventions, Assessments, Wellbeing, Referrals

CLIENT DETAILED RECORD

Selected by individual client name, show all activity, or selected date period

- Client detail
- Summary of activity
  Transaction / Intervention / Assessment / Wellbeing / Referral
- Client Notes
- Additional client contact detail

Appendix C: IMS Data Items

Further details about the IMS data set and the items that are extracted from IMS Online for inclusion in the IMS reports are available here:

https://ims.ljmu.ac.uk/info

Appendix D: Minimum Environment Criteria for IMS Online

A.1 Hardware

Users must have access to the following:

• A Windows-based PC and colour monitor with a screen resolution of at least 1024x768 (preferably higher)

A.2 Software

Users must have access to the following:

• A web browser – we recommend Google Chrome. Alternatively IMS Online works fine with Internet Explorer (version 8.0 or higher with Java Scripting enabled) and on other widely used browsers such as Firefox or Safari.

• A personal email address (with client software, e.g. Outlook or Outlook Express). We discourage the use of generic or team email accounts for setting up IMS Online user accounts.

A.3 Other

User must have access to the following:

• Internet Access (minimum: broadband preferred)

• Where an internet firewall or other restrictions are in place, the agency must ensure that access is permitted to use IMS Online.