

Note that the following document reflects changes first implemented in PIMS Version 7.2.0

How Does PIMS Filter Data for Each Report?

One of the most common questions we receive from PIMS sites relates to how PIMS determines which participants and which participant data are included in each report. In order to accommodate the diverse range of reporting requirements for PIMS sites in different states with different stakeholders, the PIMS Report Menu features a wide range of parameters to enable flexibility in reporting.

PIMS terminology has evolved over time, as we've learned to communicate more precisely and consistently how data is defined and how standard calculations are performed. As some ambiguity and inconsistency remains, PIMS 7.2 needs to address these challenges by using terminology which is both more consistent throughout the system and more consistent with language used by HFA. At the same time, PIMS' reporting flexibility needs to be preserved.

While becoming familiar with new and updated PIMS terminology may take some effort upfront, the purpose of these changes is to get everyone speaking the same language, and ultimately to make the cohort selections for reports more predictable and transparent.

Following is an explanation of some key terminology currently used in PIMS as well as proposed changes in PIMS 7.2.

Defining Participant Status

Service Start Date and Service End Date

Service Start Date and **Service End Date** define the start and end of a participant's period of active enrollment. Although these terms are flexibly defined (configured through the **Site/Enrollment Definition Form**), HFA accreditation reporting requires the following definitions:

- **Service Start** is the **date of first home visit**
- **Service End** is the **date of final home visit**

Note that **Service Start Date** is synonymous with **Enrollment Date**.

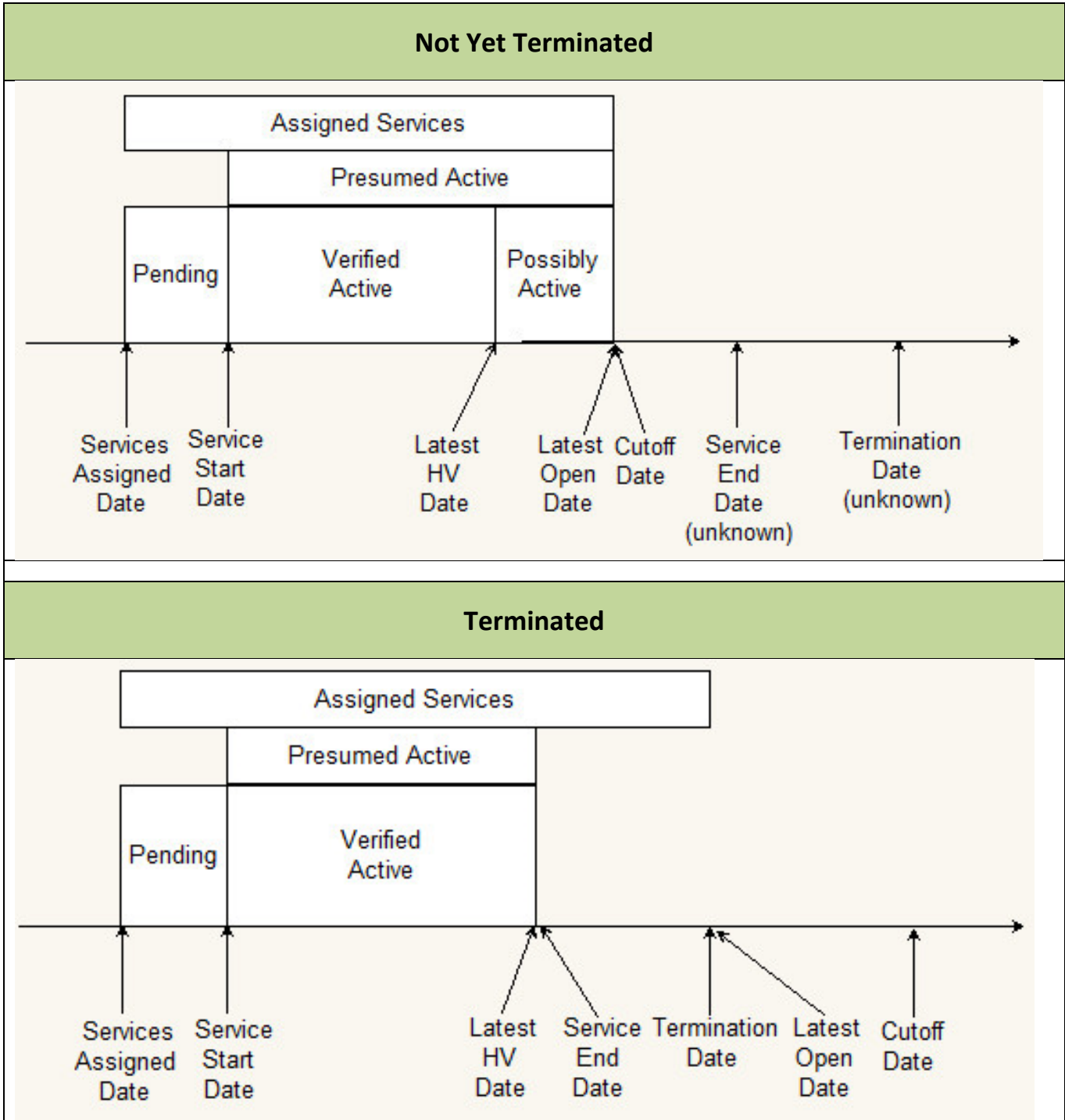
Date of Last Home Visit vs. Date of Final Home Visit vs. Date of Latest Home Visit

The term **Date of Last Home Visit** was a source of confusion in PIMS. Beginning in PIMS 7.2, this term will be replaced by **Date of Final Home Visit** and **Date of Latest Home Visit**

- **Date of Final Home Visit** is calculated only for terminated participants, and is the date of the last home visit received. Prior to termination, this date is left blank.
- **Date of Latest Home Visit** refers to the most recent home visit, and changes each time a new home visit is entered.

Participant Status Timeline

The following charts depict key dates in the course of a participant’s case, as well as the definition of a participant’s status at any point in time.



Service Assignment Dates

Date	Definition	How this is Assigned in PIMS
Services Assigned Date	This is the date on which a participant is assigned a Service Level and a Family Support Worker. From this date forward, the participant will be included in Caseload and Home Visit reports.	In the Intake Form , under Participant Service Level Baseline , this field is labeled Date Assigned
Termination Date	This is the date on which a participant is removed from services and from their Family Support Worker's caseload.	In the Termination Form
Cutoff Date	This is the latest date for which a site has caught up on all data entry, as specified in Data Cutoff field in the Standard Reports Menu . Note that it is possible to specify a cutoff date as late as the first day of the month following today's date.	In the Standard Reports Menu
Latest Open Date	For reporting purposes, this is the latest date for which a person is considered to be assigned to a caseload. This is the participant's Termination Date for closed cases, or the Cutoff Date for open cases.	Automatically calculated

Participant Status

The following terms are used to define a participant's status throughout the history of their case.

Term	For Underminated Cases	For Terminated Cases
Assigned Services	The time period between a participant's Services Assigned Date and Latest Open Date .	same
Pending	The time period between a participant's Services Assigned Date and Service Start Date .	same
Verified Active	The time period between a participant's Service Start Date and Latest Open Date . Note that this term had been used inconsistently in PIMS 7.0. See the PIMS 7.2 Revisions to the Term Active section below for a description of changes in PIMS 7.2.	same
Possibly Active	For enrolled but underminated cases, the time between a participant's Latest Home Visit Date and Cutoff Date .	N/A
Presumed Active	The time period between a participant's Service Start Date and Cutoff Date .	The time period between a participant's Service Start Date and Service End Date .

PIMS 7.2 Revisions to Participant Search Menu's Case Status Parameter

The **Case Status** parameter in the **Participant Search Menu** is not consistent with other terminology in PIMS or in this document. The following chart describes changes in PIMS 7.2.

Term	PIMS 7.0 Definition	PIMS 7.2 Definition
Engaged	Filter for participants who have a Service Start Date , regardless of current status.	Renamed to Enrolled .
Engaged and Active	Filter for participants who have a Service Start Date , and have not yet terminated.	Renamed to Enrolled and Currently Presumed Active .
Current	Filter for participants who have a Service Level Assigned Date , and have not yet terminated.	Renamed to Currently Assigned Services .

PIMS 7.2 Revisions to the Term Active

The term “active” is used inconsistently in PIMS 7.0 and PIMS 7.1.

PIMS Usage	PIMS 7.0 Definition	Changes in PIMS 7.2	Will this Change Report Cohorts?
ND MIECHV reports	Active Between refers to the time period between a participant's Service Start Date and Service End Date (which was set as Latest Home Visit Date).	Active Between refers to the time period between a participant's Service Start Date and Latest Home Visit Date .	No, at least not for North Dakota sites.
Custom Queries-Active Wizard	Active refers to participants who have a Service Start Date	Renamed to Enrolled	No
Custom Queries-Service End Date	Service End Date as Date of Last Home Visit really refers to Date of Latest Home Visit	Service End Date as Date of Final Home Visit refers to Date of Latest Home Visit only for terminated participants; otherwise this is null	Yes, if Service End Date had been configured to Date of Last Home Visit in PIMS 7.1
Custom Queries-Active Between Criteria Wizard	Active Between refers to the time period between a participant's Service Start Date and Service End Date .	Active Between refers to the time period between a participant's Service Start Date and Latest Home Visit Date .	Yes, if Service End Date had been configured to something <i>other than Date of Last Home Visit</i> in PIMS 7.1.
Participant Home Form, Case Status field	Active refers to participants who have a Service Start Date , but have not yet terminated.	The term Active will be replaced with Currently Presumed Active	No
Standard Reports Menu- Case Status parameter option Active	Active refers to participants who have a Service Start Date , but have not yet terminated.	The term Active will be replaced with Currently Presumed Active	No
Standard Reports Menu- Case Status parameter option Active Between	Active Between refers to participants who have a Service Start Date before the end of the specified period, and have either not yet terminated or terminated after the start of the specified period.	The term Active will be replaced with Presumed Active Between	No

Report Filtering Methodology

Calculation of First, Latest, and Final Home Visit Dates

For sites which use the **Home Visit Log Form** to track all home visits (i.e., check the “Count Home Visits from Monthly Contact Log option in Site/Enrollment Definitions), the **First, Latest, and Final Home Visit Dates** are calculated automatically for individual people as key records are added, edited, or deleted. For sites which don’t use the **Home Visit Log Form**, these dates are prepopulated on first upgrading to PIMS 7.2, but then must be manually entered.

Field	Form	Count Home Visits from Monthly Contact Log <i>is not</i> checked	Count Home Visits from Monthly Contact Log <i>is</i> checked
Date of First Home Visit	Participant Home Form	Automatically calculated based on the earliest Date of Visit found in the Home Visit Log Form	Manually entered in Participant Home Form Upon first upgrading to PIMS 7.2, this date is prepopulated from the earliest Date of Visit found in the Home Visit Log Form . If that is not available it is estimated based on the earliest month for which a Monthly Contact Log is entered with at least one scheduled home visit completed or unscheduled home visit completed
Date of latest home visit	Participant Home Form	Automatically calculated based on the latest Date of Visit found in the Home Visit Log Form	Estimated based on the latest month for which a Monthly Contact Log is entered with at least one scheduled home visit completed or unscheduled home visit completed
Date of final home visit	Termination Form	Once Termination Form record has been created, this is automatically calculated based on the latest Date of Visit found in the Home Visit Log Form .	Manually entered in the Termination Form . Upon first upgrading to PIMS 7.2, this date is estimated for existing terminated participants based on the latest month for which a Monthly Contact Log is entered with at least one scheduled home visit completed or unscheduled home visit completed .

Report Activity Filtering

Reports listing activities due while a participant is **Assigned Services** reflect whether an activity should be completed while a participant is currently assigned to a caseload. Reports listing activities completed while a participant is **Active** are meant to reflect activities a home visitor can influence while a person is actively participating in services.

Report Category	Types of Reports	Report Lists Activities Due During This Time Period
Case History	Service Level History	While participant is Assigned Services
Case Management	Caseload	While participant is Assigned Services
Contact/Home Visit	Home Visit Activities, Home Visit Completion	While participant is Assigned Services
Child Outcomes	Checkpoints, Scores within Normal Limits, Immunizations, Well Baby Visits	While participant is Active
Family Outcomes	Checkpoints, Scores within Normal Limits, Life Course	While participant is Active

Quality Assurance Reports

The following quality assurance reports introduced in PIMS 7.2 should help you troubleshoot any issues with participant status and report filtering.

QA08: Calculation of Service Start Date and Service End Date

This report should give you a clearer picture of how **Service Start Dates** and **Service End Dates** are calculated for participants in your site.

Name	Service Start	Screen	Assess	Intake-Accept Services	Intake-Signed Agree't	Intake-Services Assigned	First Home Visit	Service End	Latest Home Visit	Final Home Visit	Term-Term. Date	Term-Last Contact
Aguilar, Verna	4/7/10	2/1/10	3/17/10	4/2/10	4/2/10	4/3/10	4/7/10		1/15/12			
Bailey, Mildred	3/5/10	2/1/10	2/19/10	3/1/10	3/2/10	3/2/10	3/5/10	1/9/12	1/9/12	1/9/12	1/12/12	1/12/12

QA09: Estimation of First, Latest, and Final Home Visits

The report header in this report displays whether the **Count Home Visits from Monthly Contact Log option** is checked or not checked. The dates displayed here will help you understand exactly how the first, latest, and final home visits are determined for each participant.

Name	First Home Visit	First HV Log	First MCL w HV	Home Form-First HV	Latest HV	Final HV	Last HV Log	Last MCL w HV	Term-Term. Date	Term-Final HV
Aguilar, Verna	4/7/10	4/7/10	4/1/10	4/7/10	1/15/12		1/15/12	1/1/12		

QA10: Home Visit Lapse for Enrolled Cases

This report should help you evaluate the integrity of using each participant's **Presumed Active** status, by calculating the number of days a participant is only "possibly active"- i.e., the time between the latest home visit date and the cutoff date, for active participants.

Name	Service Level	Latest HV	Cutoff	Term. Date	HV Lapse/Possibly Active (Days)
Aguilar, Verna	Level I	1/15/12	2/1/12		15