

## 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. To address existing ambiguity and inconsistency, PIMS 8 uses terminology which is both more consistent throughout the system and more consistent with language used by HFA.

While becoming familiar with 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 used in PIMS 8.

## Defining Participant Status

### Service Dates

Date	Definition	How this is Assigned in PIMS
<b>Services Assigned Date</b>	The date on which a participant is assigned a <b>Service Level</b> and a <b>FSW</b> . From this date forward, the participant will be included in <b>Caseload</b> and <b>Home Visit</b> reports.	In the <b>Intake Form</b> , under <b>Participant Service Level Baseline</b> , this field is labeled <b>Date Assigned</b>
<b>Service Start Date</b> or <b>Enrolled</b>	The start of a participant's period of active enrollment.	This flexible definition can be configured through the <b>Site/Enrollment Definition Form</b> , but HFA accreditation requires that this be the <b>date of first home visit</b> .
<b>Service End Date</b>	The end of a participant's period of active enrollment.	This flexible definition can be configured through the <b>Site/Enrollment Definition Form</b> , but HFA accreditation requires that this be the <b>date of final home visit</b> .
<b>Termination Date</b>	This is the date on which a participant is removed from services and from their Family Support Worker's caseload.	In the <b>Termination Form</b>

## PIMS Participant Status Definitions

RR 1/13/17

<b>Cutoff Date</b>	The is the latest date for which a site has caught up on all data entry.	Specified in <b>Data Cutoff</b> field in the <b>Standard Reports Menu</b> . Note that it is possible to specify a cutoff date as late as the first day of the month following today's date.
<b>Latest Open Date</b>	For reporting purposes, this is the latest date for which a person is considered to be assigned to a caseload.	This is automatically calculated as the participant's <b>Termination Date</b> for closed cases, or the <b>Cutoff Date</b> for open cases.

### Participant Current Status

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

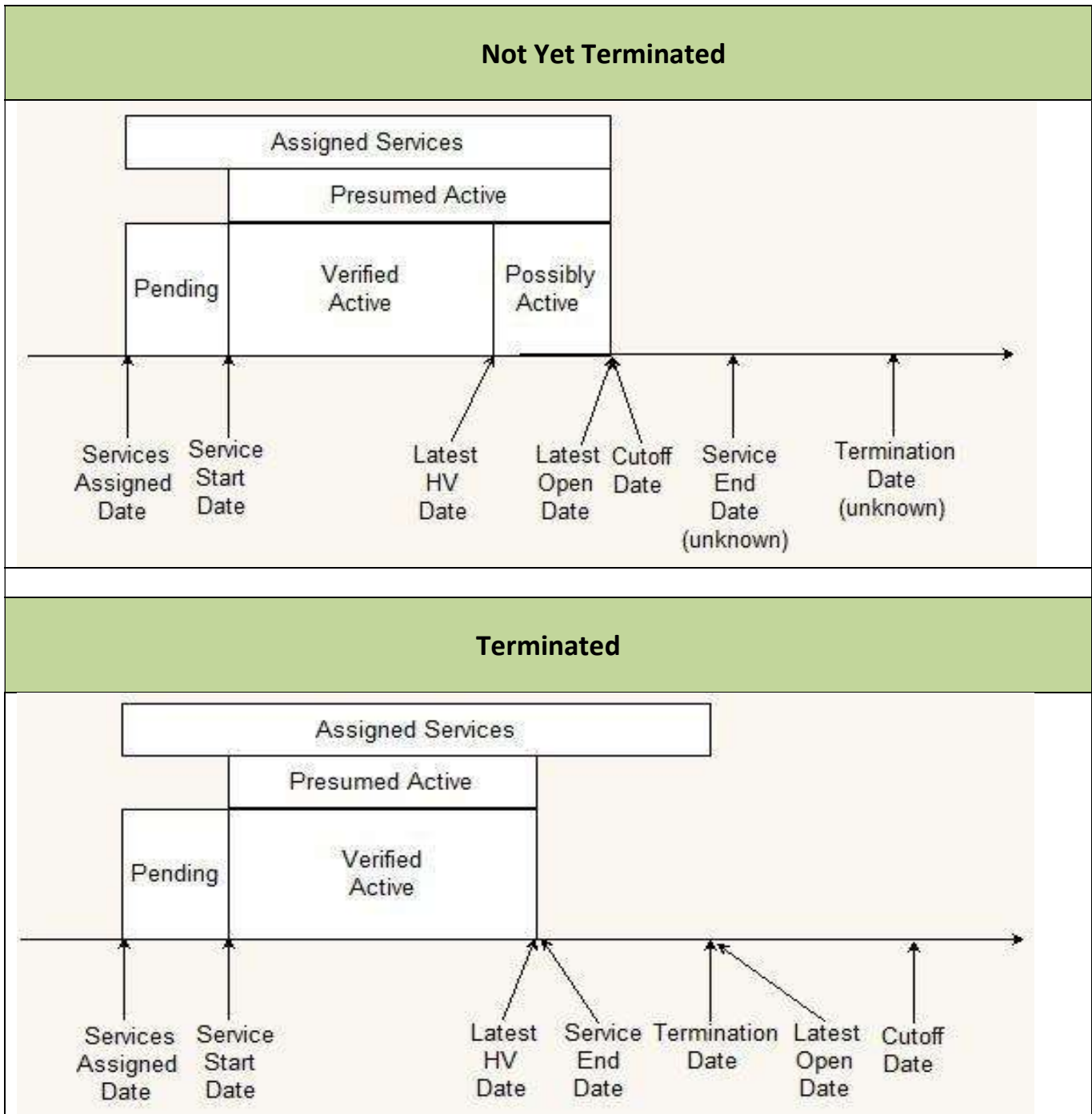
Term	Definition
<b>Active</b>	Participants who are between their <b>Service Start Date</b> and <b>Service End Date</b>
<b>Currently Assigned Service</b>	Participants who have a <b>Service Level Assigned Date</b> and have not yet terminated.
<b>Currently Presumed Active</b>	Participants who have a <b>Service Start Date</b> , and have not yet terminated.
<b>Enrolled</b>	Participants who have a <b>Service Start Date</b> , regardless of current status.

### Participant Status

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

## Participant Status Timeline

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



## 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 (as defined in **Site/Enrollment Definitions**), the **First, Latest, and Final Home Visit Dates** are calculated automatically for individual participants as key records are added, edited, or deleted. For sites which don't use the **Home Visit Log Form**, these dates 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
<b>Date of First Home Visit</b>	<b>Participant Home Form</b>	Automatically calculated based on the earliest <b>Date of Visit</b> found in the <b>Home Visit Log Form</b>	Manually entered in <b>Participant Home Form</b>  Upon first upgrading to PIMS 7.2, this date is prepopulated from the earliest <b>Date of Visit</b> found in the <b>Home Visit Log Form</b> . If that is not available it is estimated based on the earliest month for which a <b>Monthly Contact Log</b> is entered with at least one <b>scheduled home visit completed</b> or <b>unscheduled home visit completed</b>
<b>Date of latest home visit</b>	<b>Participant Home Form</b>	Automatically calculated based on the latest <b>Date of Visit</b> found in the <b>Home Visit Log Form</b>	Estimated based on the latest month for which a <b>Monthly Contact Log</b> is entered with at least one <b>scheduled home visit completed</b> or <b>unscheduled home visit completed</b>
<b>Date of final home visit</b>	<b>Termination Form</b>	Once <b>Termination Form</b> record has been created, this is automatically calculated based on the latest <b>Date of Visit</b> found in the <b>Home Visit Log Form</b> .	Manually entered in the <b>Termination Form</b> .  Upon first upgrading to PIMS 7.2, this date is estimated for existing terminated participants based on the latest month for which a <b>Monthly Contact Log</b> is entered with at least one <b>scheduled home visit completed</b> or <b>unscheduled home visit completed</b> .

### 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 <b>Assigned Services</b>
Case Management	Caseload	While participant is <b>Assigned Services</b>
Contact/Home Visit	Home Visit Activities, Home Visit Completion	While participant is <b>Assigned Services</b>
Child Outcomes	Checkpoints, Scores within Normal Limits, Immunizations, Well Baby Visits	While participant is <b>Active</b>
Family Outcomes	Checkpoints, Scores within Normal Limits, Life Course	While participant is <b>Active</b>

## Quality Assurance Reports

The following reports should help you troubleshoot issues with participant status and report filtering.

### PIMS28: Enrollment History

This report is useful for determining the enrollment duration (i.e. retention) of participants based on their enrollment date.

Name	Svc Level at Intake	FSW at Intake	Enroll Date	Latest HV Date	Termination Date	Months Retained	Months Retained (verified)
Aguilar, Verna	Level I	105	2/27/02	2/10/04		48	23

### 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