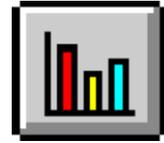

Chapter 5 Program Evaluation Module



Overview

The Aggregate Reports for Program Evaluation (ARPE) can be used to evaluate how well tuberculosis programs test and treat infected tuberculosis clients, as well as their success in following-up with contacts to tuberculosis cases.

Aggregate Reports for Program Evaluation differ from other reports found in TIMS. While many of the controls are the same, ARPEs are unique; the report information is entered directly on a report-like data entry screen, not generated from information entered elsewhere in TIMS.

There are two Aggregate Reports for Program Evaluation: *Follow-up and Treatment for Contacts to Tuberculosis Cases* and *Targeted Testing and Treatment for Latent Tuberculosis Infection*.

- The **Follow-up and Treatment for Contacts to Tuberculosis Cases** report is an annual summary of the core activities of obtaining and evaluating contacts to tuberculosis cases and treating the contacts who have latent TB infection.
- The **Targeted Testing and Treatment for Latent Tuberculosis Infection** report is an annual summary of activities to find and treat latent tuberculosis infection through targeted and other testing.

Open the Program Evaluation Module

Use the Program Evaluation module to process ARPE.

To open the Program Evaluation module, use one of the following procedures...

- Open the **C**lient menu and select **P**rogram Evaluation.

Or

- Click the **Program Evaluation** button on the toolbar.



Open an ARPE Reports Selector Window

The two ARPE Reports Selector windows enable you to create, edit, combine, delete, browse, and transfer ARPE documents.

To open the Reports Selector window...

1. Open the **Program Evaluation** module.
2. Click either the **F**ollow-up and Treatment for Contacts to Tuberculosis Cases or **T**argeted Testing and Treatment for Latent Tuberculosis Infection buttons on the toolbar.

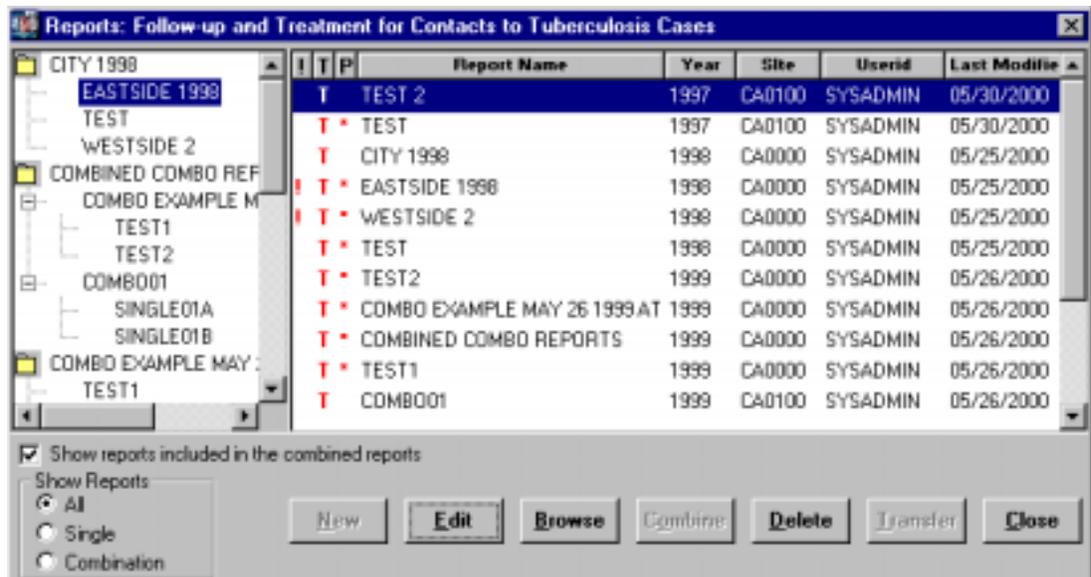


Or

Open the **R**eports menu and select either **F**ollow-up and Treatment for Contacts to TB Cases or **T**argeted Testing and Treatment for Latent TB Infection.

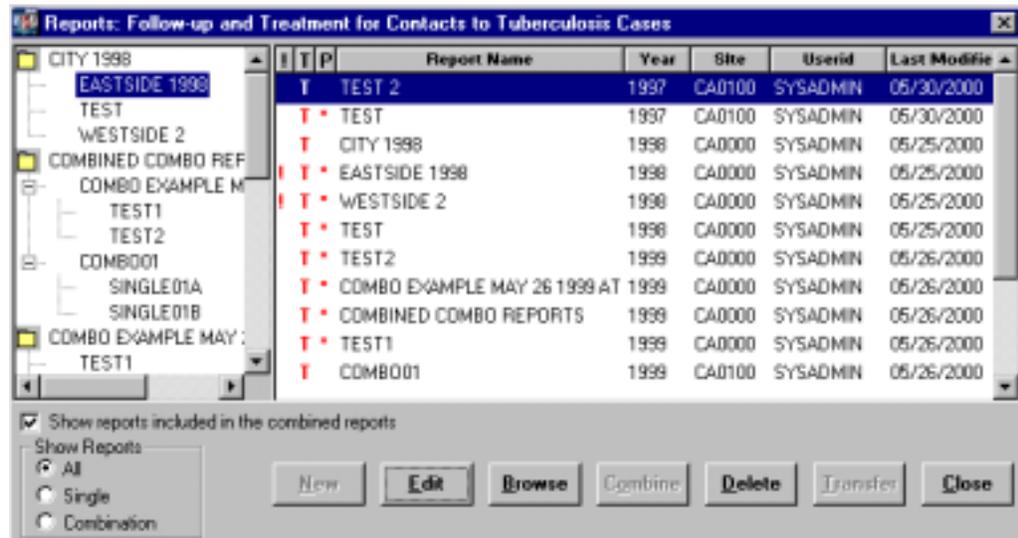


The Reports Selector window appears (Follow-up and Treatment for Contacts to Tuberculosis Cases Report, in this example).



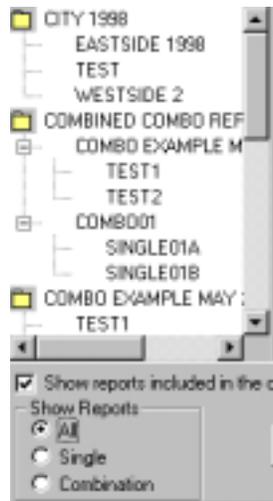
Reports Selector Window

The Reports Selector window is identical for both ARPE report types. The Report Selector window is divided into two panes: **Combination** and **Detail**.



Combination Pane

The Combination pane is located on the left side of the window. It displays representations of both single and combination reports and allows you to modify the contents of combination reports using the drag-and-drop method. Selections in the Combination pane cannot be manipulated by using the command buttons.



Use one of the following methods to filter reports listed in the Combination pane:

In the Show Reports group...

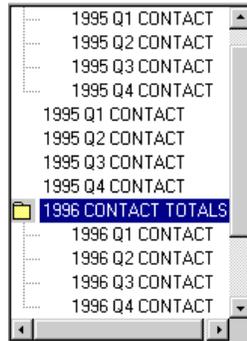
- Select **All** – This will display all reports including combination and single reports.
- Select **Single** – This will display only single reports.
- Select **Combination** – This will display only combination reports.

Use one of the following methods to view sub-reports contained within combination reports:

- Check the **Show reports included in the combined reports** checkbox. Uncheck this check box to hide the sub-reports.

Or

- Double-click a combination report to display the sub-reports. Double-click again to hide the sub-reports.



Detail Pane

The Detail pane is located on the right side of the window. It provides explicit information about individual reports and methods to control and manipulate those reports.

I	T	P	Report Name	Year	Site	Userid	Last Modified
	T		TEST 2	1997	CA0100	SYSADMIN	05/30/2000
	T *		TEST	1997	CA0100	SYSADMIN	05/30/2000
	T		CITY 1998	1998	CA0000	SYSADMIN	05/25/2000
I	T *		EASTSIDE 1998	1998	CA0000	SYSADMIN	05/25/2000
I	T *		WESTSIDE 2	1998	CA0000	SYSADMIN	05/25/2000
	T *		TEST	1998	CA0000	SYSADMIN	05/25/2000
	T *		TEST2	1999	CA0000	SYSADMIN	05/26/2000
	T *		COMBO EXAMPLE MAY 26 1999 AT	1999	CA0000	SYSADMIN	05/26/2000
	T *		COMBINED COMBO REPORTS	1999	CA0000	SYSADMIN	05/26/2000
	T *		TEST1	1999	CA0000	SYSADMIN	05/26/2000
	T		COMBO01	1999	CA0100	SYSADMIN	05/26/2000

Header	Description
Incomplete Indicator (!)	Displays an exclamation point (!) when the user has flagged the report as "Incomplete".
Transfer Indicator (T)	Displays a star (★) when a report is marked for transfer. The star will also appear when a previously transferred report has been modified and must be re-transferred. Displays a T when report has been transferred.
Preliminary / Final Indicator (P)	Displays a (★) when a report is preliminary report.
Report Name	Name assigned to the report by the person who created it.
Year	Cohort year for the report.
Site	Site owning the report.
User ID	The TIMS User ID of the person who created the report.
Last Modified	The date the report was last modified.

Command Buttons

Use the command buttons to process reports in the Detail pane. The command buttons do not affect the items in the Combination pane. Be sure to check which report(s) is (are) selected in the Detail pane before clicking a command button.

	To create a new report.
	To modify the selected report.
	To view the selected report or reports.
	To create a new report using the data from the selected reports.
	To permanently remove the selected report.
	To prepare a file containing all ARPE reports marked for transfer. This file will then be transmitted to the CDC (via the Reporting Area sites, if necessary).
	To exit the Reports Selector window.

Creating Reports

Use the following steps to create a new ARPE. Once created, the report can be modified, combined with other reports, deleted, and transferred.

The New Window

To create a new ARPE...

1. Open the **Program Evaluation** module.
2. Click either the **Follow-up and Treatment for Contacts to Tuberculosis Cases** or **Targeted Testing and Treatment for Latent Tuberculosis Infection** buttons on the toolbar.



Or

Open the **Reports** menu and select either **Follow-up and Treatment for Contacts to TB Cases** or **Targeted Testing and Treatment for Latent TB Infection**.

3. Click the **New** button.

The New window appears

Form Approved
OMB No. 0920-0457
Exp. Date 11/30/2002

Reporting Area: LA0003
Cohort Year: []
Preliminary Date for Follow-up: 08/05/ [August 15 of the first year after the cohort year]
Total TB Cases Reported: []

Preliminary Report
 Final Report

Cases for Investigation.....	Types of Cases for Investigation:		
	Sputum smear +	Sputum smear - cult. +	Others
Cases with No Contacts.....			
Number of Contacts.....			
Evaluated.....			
TB Disease.....			
Latent TB Infection.....			
Started Treatment.....			
Completed Treatment.....			
Reasons Treatment Not Completed:			
Death.....			

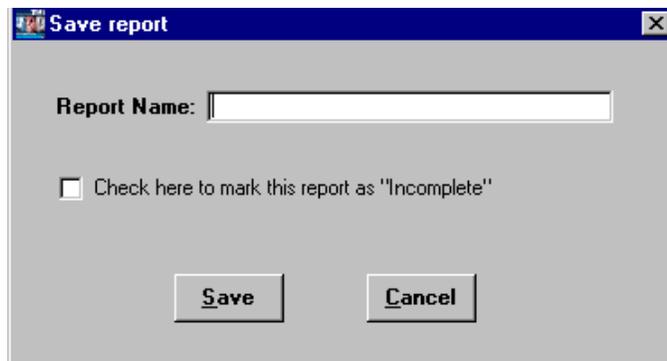
Ready 10/13/2000 8:54 am

4. Enter Cohort year.
5. Select a Report status from the available options:
 - **Preliminary Report** indicates that the report will be modified at a later date. This is the default option. The preliminary report is submitted during the first year after the cohort year.

- **Final Report** indicates that the report is complete and will not be modified. Final reports are submitted during the second year after the cohort year.
6. For the *Follow-up and Treatment for Contacts to Tuberculosis Cases* report only, enter Total TB Cases Reported; the default is the number of cases entered into TIMS for current site during the specified cohort year.
 7. Complete the form by entering the appropriate data in the corresponding boxes.
See Basic Instructions for the Aggregate Reports for Tuberculosis Program Evaluation: Targeted Testing and Treatment for Latent Tuberculosis Infection or Basic Instructions for the ARPE: Follow-up and Treatment for Contacts to Tuberculosis Cases, for detailed information on the appropriate data for each field. (Appendix PEI- Program Evaluation forms)
 8. Click the **Save** button.



The *Save* report dialog box will appear.



9. Type a name into the Report Name box.
10. Put a check in the check box if the report is considered incomplete.
11. Click the **S**ave button to save. Click the **C**ancel button to abandon the save operation and return to the report window.
12. Click the **C**lose button to return to the reports selector window.



New Window Buttons

These buttons are available on the **N**ew window.

	Transfer	Mark the report for transfer.
	Save	Save changes to the report.
	Print	Print the current report.
	Close	Close the active report and return to the Reports Selector window.

Editing Reports

Use the following steps to modify an existing ARPE report.

Note: If you edit a report which has already been transferred, TIMS will mark it to be transferred again.

The Edit Window

To edit an existing ARPE ...

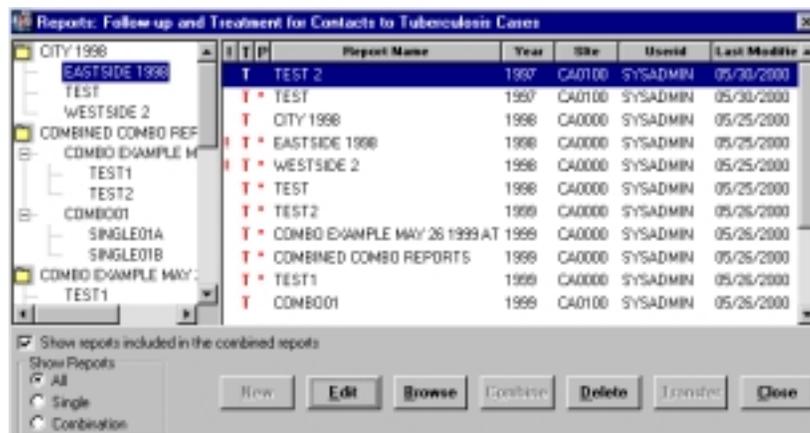
1. Open the **Program Evaluation** module.
2. Click either the **Follow-up and Treatment for Contacts to Tuberculosis Cases** or **Targeted Testing and Treatment for Latent Tuberculosis Infection** buttons on the toolbar.



Or

Open the **Reports** menu and select either **Follow-up and Treatment for Contacts to TB Cases** or **Targeted Testing and Treatment for Latent TB Infection**.

3. Click on a report in the Report Folders window (Detail pane) and click the **Edit** button.



The selected report appears in edit mode.

Reporting Area: L8000
 Cohort Year: 2001
 Closure Date for Follow-up: 8/31/2003 (Report it at the second year after the cohort year)
 Total No Cases Reported: 376

Part I: Cases and Contacts

	Types of Cases for Investigation		
	Sensitve smear =	Sensitve smear - rsk =	Others
Cases for Investigation	61	350	111
Cases with No Contacts	74	374	23
Number of Contacts	1111	350	111
Evaluated	1110	349	23
TB Disease	2	2	1
Latent TB Infection	562	50	20
Started Treatment	601	41	14
Completed Treatment	701	31	10

Reasons Treatment Not Completed:

Death	21	2	0
-------	----	---	---

Ready 10/12/2000 8:58 am

4. Complete intended modifications and click the **Save** button.



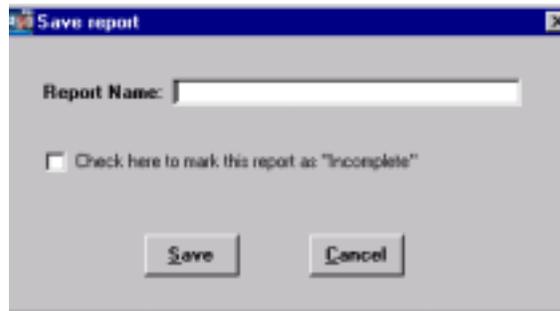
The Save as dialog box will appear.



5. Click **Y**es to save the current report under a different name. Click **N**o to save report under current name.

See Create a New Report from an Existing Report later in this chapter for additional information. Click **C**ancel to stop the save operation and return to the Edit window.

6. If you selected to Save as a new report, enter the new name and click **S**ave. If you chose to save the report under the same name, click **S**ave.



7. Click the **C**lose button

Edit Window Buttons

The following buttons are available on the Edit window.



Transfer Mark the report for transfer.



Save Save changes to the report.



Print Print the current report.



Close Close the active report and return to the Reports Selector window.

Browsing Reports

The Browse feature allows you to preview several reports at a time, as they would be printed. Information in the Browse window cannot be edited.

Open the Browse Window

To preview an ARPE ...

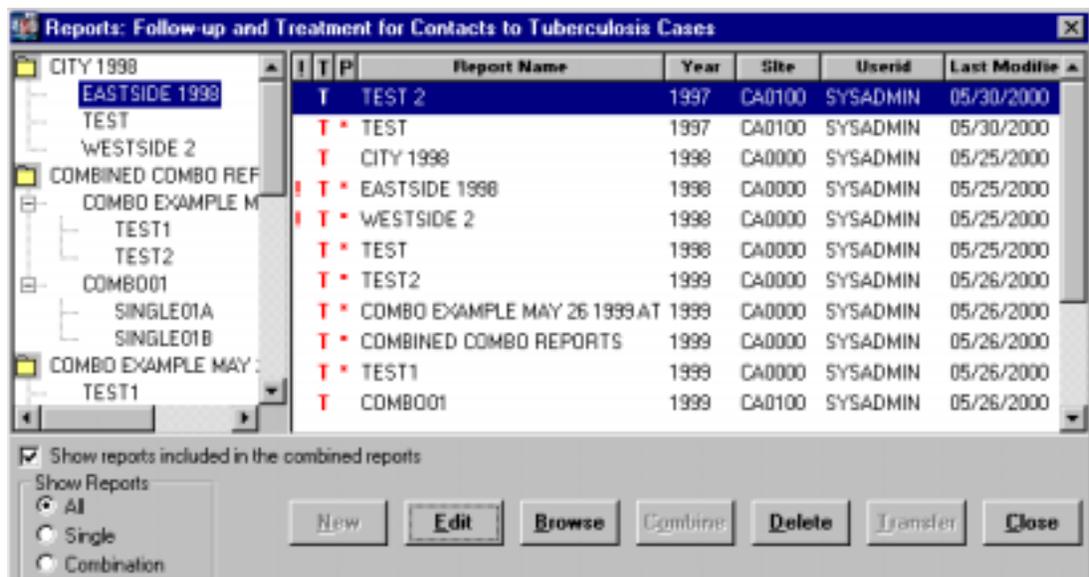
1. Open the **Program Evaluation** module.
2. Click either the **Follow-up and Treatment for Contacts to Tuberculosis Cases** or **Targeted Testing and Treatment for Latent Tuberculosis Infection** buttons on the toolbar.



Or

Open the **Reports** menu and select either **Follow-up and Treatment for Contacts to TB Cases** or **Targeted Testing and Treatment for Latent TB Infection**.

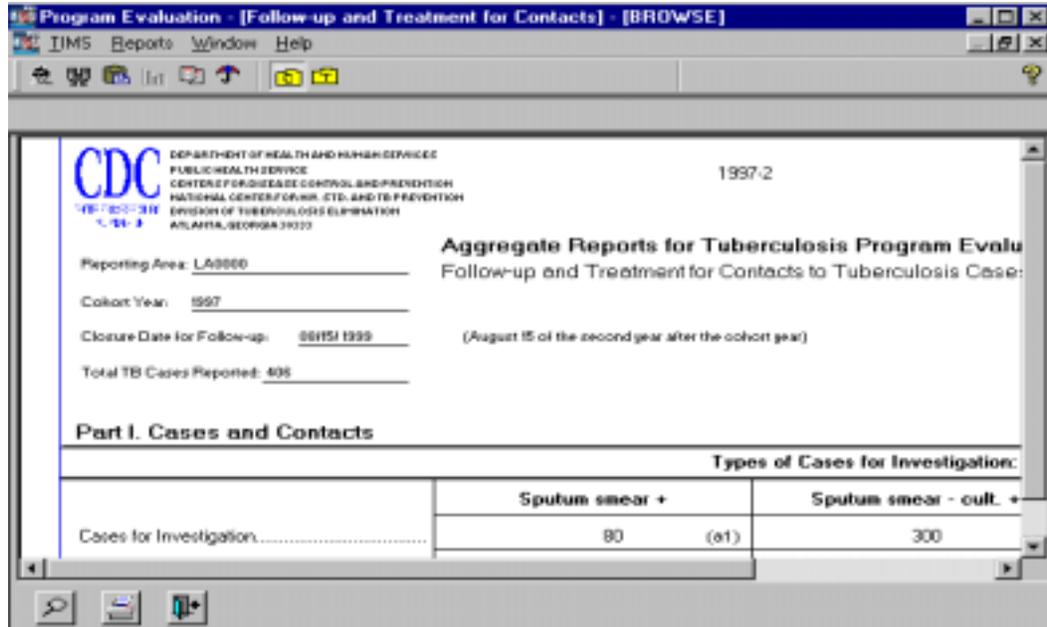
3. Use one of the following methods to open the Browse window:
 - Select a report from the list in the Detail (right) pane of the Report Folders window, (use the Ctrl key and mouse to select multiple reports) and click the **Browse** button.



Or

- Double-click the report in the Detail (right) pane.

The Browse window appears.



4. When you have finished viewing the report in the browse window, click the **Close** button.



Viewing Included Sub - Reports while Browsing a Combination Report

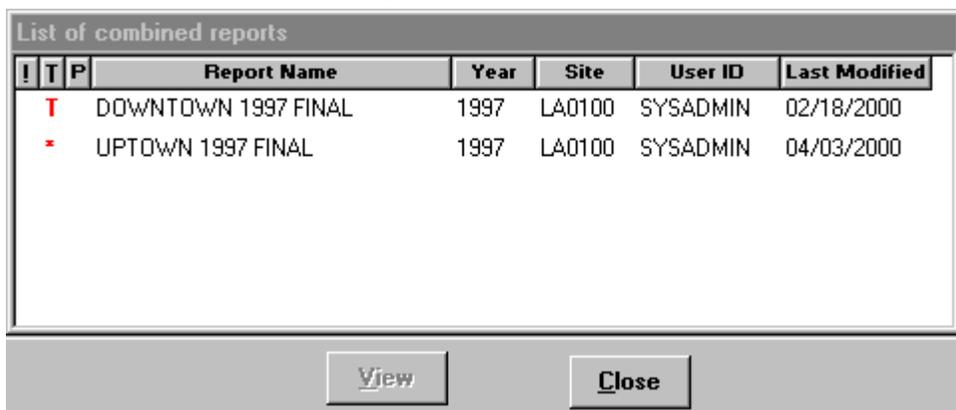
You can view the sub-reports that make up a Combination Report while viewing the Combination Report in the Browse window.

To browse the sub-reports of a Combination Report from the Browse window...

1. Click the **List of Included Reports** button.

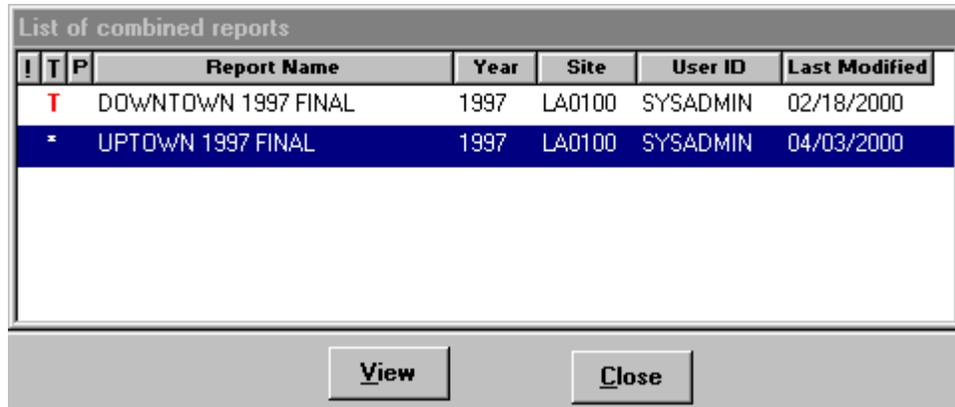


The List of Combined Reports window appears.



2. Use one of the following methods to browse an included sub-report:

- Select a report in the pop-up window and click **View**.



Or

- Double-click the report in the pop-up window
The View Report window appears.



3. Click the **OK** button to close the View Report window.
4. Click the **Close** button.

Browse Window Buttons



Zoom

Adjust the magnification of the report.



Print

Print the report.



Close

Close the active report and return to the Report Selector window.



List of Included Reports

Display the sub-reports within a combination report. (Active for Combination Reports only)

Using the Zoom Feature

TIMS allows you to adjust the magnification of the viewing area in the Browse window.

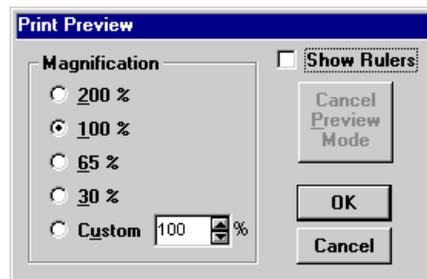
To adjust a magnification...

1. Click the **Zoom** button.

This displays the Print Preview dialog box.



2. Select a Magnification setting from the preset options or enter your own (between 1 and 1000%) in the Custom box.



3. Click the **OK** button.

Adjust Report Margins

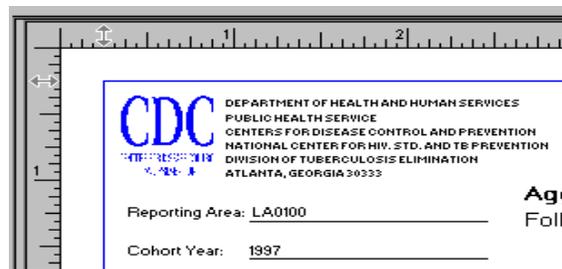
You can temporarily adjust the margins for viewing or printing (the area between the printed material and the edge of the page) by dragging the margin indicators to a new location on the horizontal and vertical rulers. The margins will return to their default location the next time you use the Browse feature to view the report.

1. Click the **Zoom** button.

This displays the Print Preview dialog box.



2. Select **Show Rulers**.
3. Click **OK**.
4. Drag the double-headed arrows to a new location to adjust the report margins.

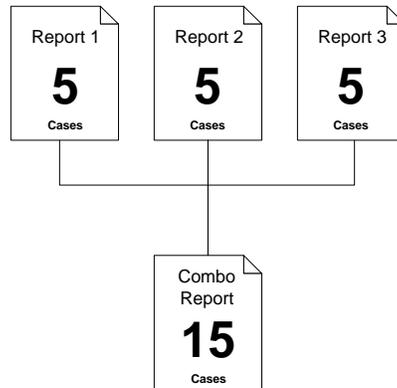


5. Click the print icon to print report.

The report will print with the newly adjusted margins.

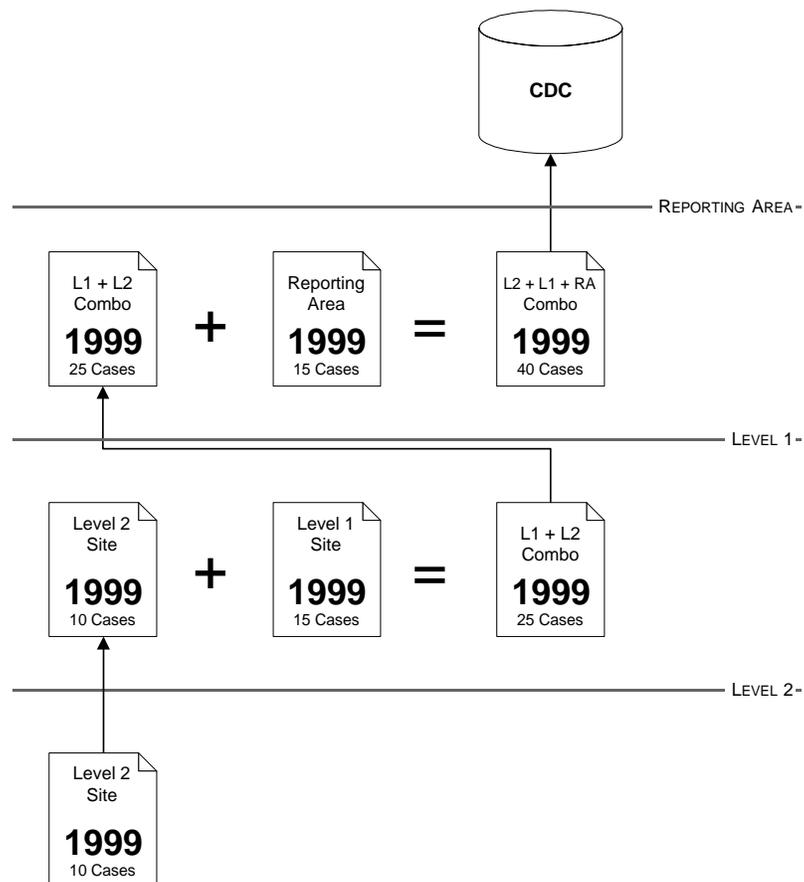
Combination Reports

Combination reports are created by joining two or more standard ARPEs for the same cohort year. The resulting combination report represents the data from all the individual component reports.



Combining Reports from Lower-Level Sites

If your site receives ARPEs from lower-level sites, you can combine the lower-level report(s) from the same cohort year with the report you intend to transmit to the CDC.



Create a Combination Report

You can create a combination report from two or more single and/or combination reports.

To create a combination report...

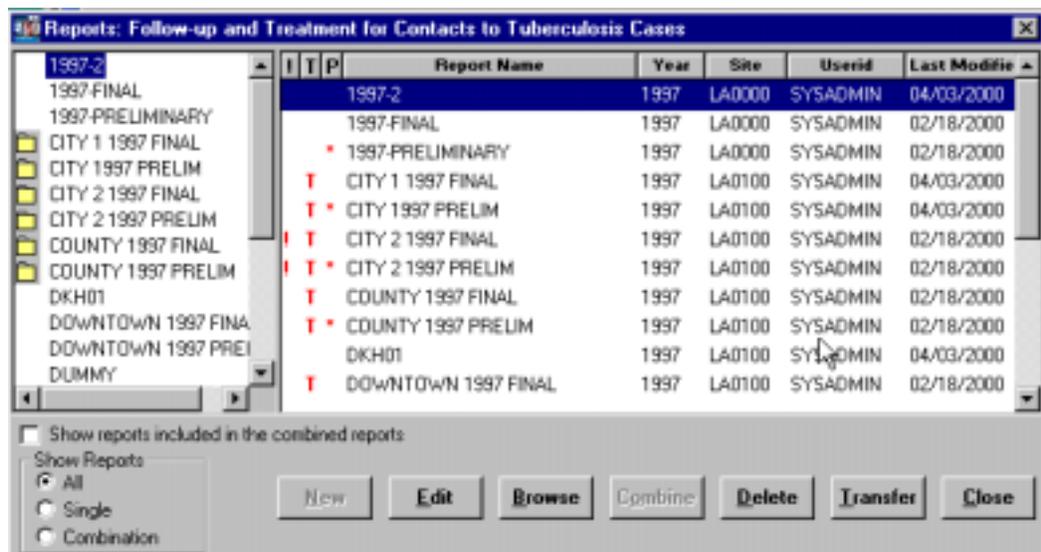
1. Open the **Program Evaluation** module.
2. Click either the **Follow-up and Treatment for Contacts to Tuberculosis Cases** or **Targeted Testing and Treatment for Latent Tuberculosis Infection** buttons on the toolbar.



Or

Open the **Reports** menu and select either **Follow-up and Treatment for Contacts to TB Cases** or **Targeted Testing and Treatment for Latent TB Infection**.

3. Select the first report you want to include in the combination report by clicking on it in the Detail pane.



4. While holding down the **CTRL** key, use the mouse to select the next report to be included in the combination report. Repeat this process until all reports to be included in the combination report have been selected.



- Click the **C**ombine button.

A new report window appears with the totals from all included reports displayed in the designated locations.

Reporting Area: GA0000
 Cohort Year: 1997
 Preliminary Date for Follow-up: 09/97 (August 15 of the first year after the cohort year)
 Total TB Cases Reported: 0

Form Approved
 OMB No. 0920-0457
 Exp. Date: 10/30/2002

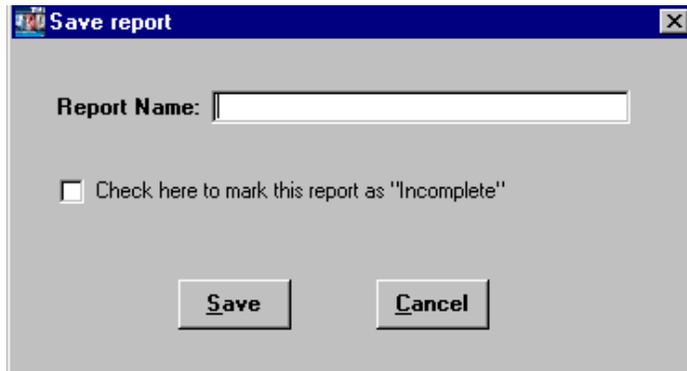
Preliminary Report
 Final Report

Cases for Investigation	Types of Cases for Investigation:		
	Sputum smear +	Sputum smear - cult. +	Others
Cases with No Contacts			
Number of Contacts Evaluated			
TB Disease			
Latent TB Infection			
Started Treatment			
Completed Treatment			
Reasons Treatment Not Completed:			
Death			
Contact Moved (follow-up unknown)			

- Select a Report status from the available options:
 - Preliminary Report** indicates that the report will be modified at a later date. Preliminary reports are submitted during the first year after the cohort year.
 - Final Report** indicates that the report is complete and will not be modified. Final reports are submitted during the second year after the cohort year. This is the only data item that can be changed on a combination report.
- Click the **S**ave button.



- Enter a name for the report.



9. If the report is incomplete, put a check in the check box.
10. Click the **S**ave button.
11. Click the **C**lose button.

Add a Report to an Existing Combination Report

Reports can be added to existing combination reports by using the ‘drag & drop’ method in the Combination pane. The data will be added to the report totals.

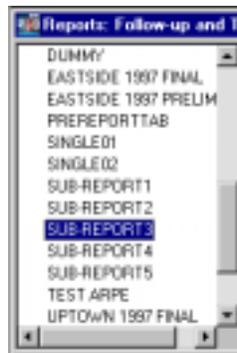
1. Open the **Program Evaluation** module.
2. Click either the **Follow-up and Treatment for Contacts to Tuberculosis Cases** or **Targeted Testing and Treatment for Latent Tuberculosis Infection** buttons on the toolbar.



Or

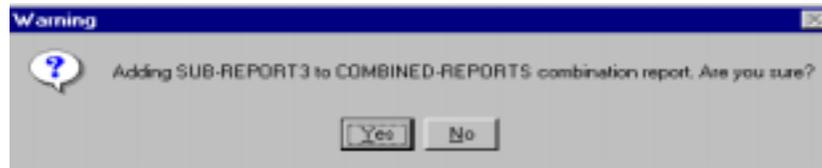
Open the **R**eports menu and select either **F**ollow-up and Treatment for Contacts to TB Cases or **T**argeted Testing and Treatment for Latent TB Infection.

3. Using the mouse, select the report to be added to the combination report in the Combination Pane.



4. While holding down the left mouse button, drag the selected report to the desired combination report, and release the mouse button.
5. Release the mouse button.

The Warning message box appears.



- Click **Y**es to add the report to the combination report. Click **N**o to cancel operation.

The report has been added to the combination report.



Remove a Sub-Report From a Combination Report

A sub-report can be removed from a combination report. As a result, the data is subtracted from the report totals.

To remove a sub-report from a combination report...

- Open the **Program Evaluation** module.
- Click either the **Follow-up and Treatment for Contacts to Tuberculosis Cases** or **Targeted Testing and Treatment for Latent Tuberculosis Infection** buttons on the toolbar.



Or

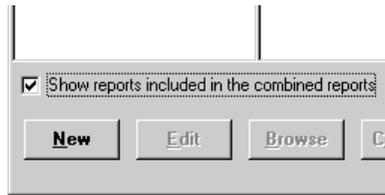
Open the **R**eports menu and select either **F**ollow-up and Treatment for Contacts to TB Cases or **T**argeted Testing and Treatment for Latent TB Infection.

- Use one of the following methods to display the components of a combination report:
 - Double-click the combination report icon in the Combination Pane to display the component reports

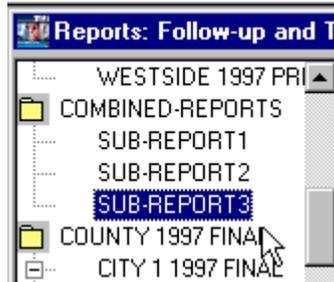


Or

- Select **Show reports included in the combined reports** directly below the Combination Pane

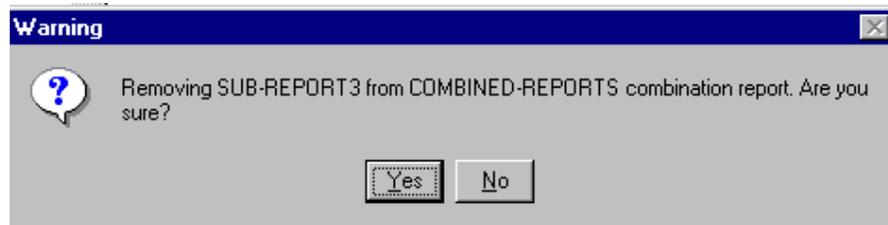


4. In the Combination Pane, use the mouse to select report to be removed from the combination report.



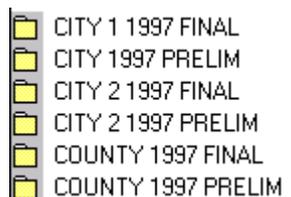
5. While holding down the mouse button, drag the sub-report to a blank area of the Combination Pane, and release the mouse button.

The Warning message box appears.



6. Click **Y**es to remove the sub-report from the combination report. Click **N**o to abandon the remove operation.

The sub-report is removed from the Combination Report.



Deleting Reports

Deleting a report will remove all of its data from TIMS.

Note: A report cannot be deleted if it has already been transferred to the next higher level.

Delete a Single Report

To delete a single, uncombined report...

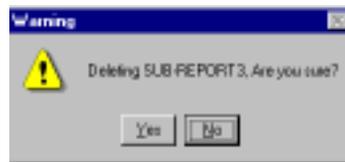
1. Open the **Program Evaluation** module.
2. Click either the **Follow-up and Treatment for Contacts to Tuberculosis Cases** or **Targeted Testing and Treatment for Latent Tuberculosis Infection** buttons on the toolbar.



Or

Open the **Reports** menu and select either **Follow-up and Treatment for Contacts to TB Cases** or **Targeted Testing and Treatment for Latent TB Infection**.

3. In the Detail Pane, select the report you want to delete and click the **Delete** button.
4. Click the **Yes** to delete the selected report. Click the **No** to abandon the delete operation and return to the Report Selector window.



Delete a Sub-Report of a Combination Report

To delete a sub-report of a combination report...

1. Open the **Program Evaluation** module.
2. Click either the **Follow-up and Treatment for Contacts to Tuberculosis Cases** or **Targeted Testing and Treatment for Latent Tuberculosis Infection** buttons on the toolbar.

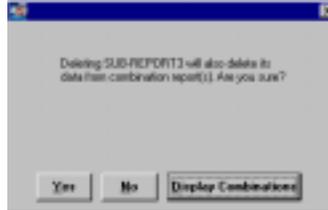


Or

Open the **Reports** menu and select either **Follow-up and Treatment for Contacts to TB Cases** or **Targeted Testing and Treatment for Latent TB Infection**.

3. In the Detail Pane, select the report you want to delete and click the **Delete** button.

The confirmation box appears.



4. Click **Yes** to delete the selected report. Click **No** to abandon the delete operation and return to the Reports Selector window. Display the Combination reports that include the selected report by clicking **Display Combinations** button.

TYPE	Report Name	Year	Site	User ID	Last Modified
	EASTSIDE 1999	1999	CA0100	SYSADMIN	10/19/2000
	WESTSIDE 1999	1999	CA0100	SYSADMIN	10/19/2000

Delete a Combination Report

To delete a combination report...

Note: Subreports will not be deleted during this operation

1. Open the **Program Evaluation** module.
2. Click either the **Follow-up and Treatment for Contacts to Tuberculosis Cases** or **Targeted Testing and Treatment for Latent Tuberculosis Infection** buttons on the toolbar.

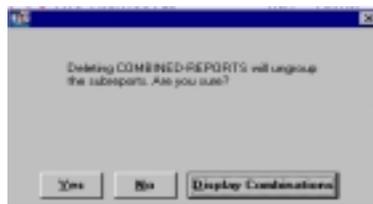


Or

Open the **Reports** menu and select either **Follow-up and Treatment for Contacts to TB Cases** or **Targeted Testing and Treatment for Latent TB Infection**.

3. On the Detail Pane, select the report you want to delete and click the **Delete** button.

The Confirmation box appears.



4. Click **Yes** to delete the selected report. Click **No** to abandon the delete operation and return to the Reports Selector window. Click the **Display Combination** button to view reports that include the selected report.

Transferring Reports

The Aggregate Reports for Program Evaluation provide CDC with important information about local TB program activities. CDC receives this information through the TIMS ARPE transfer function. This function is similar to the process in which surveillance data is transferred.

Note: Only one report of each type can be transferred per cohort year. Once transferred, the report can be edited and/or transferred again.

ARPEs are transferred through a three-step process: 1) mark for transfer, 2) prepare transfer file, and 3) transmit the file to the next higher-level site. Two of these steps, mark for transfer and prepare transfer file, are performed in the Program Evaluation module. The third, transmit file, is performed in the System module.

Marking Reports for Transfer

There are two ways to mark an ARPE report for transfer.

1. Open the **Program Evaluation** module.
2. Click either the **Follow-up and Treatment for Contacts to Tuberculosis Cases** or **Targeted Testing and Treatment for Latent Tuberculosis Infection** buttons on the toolbar.



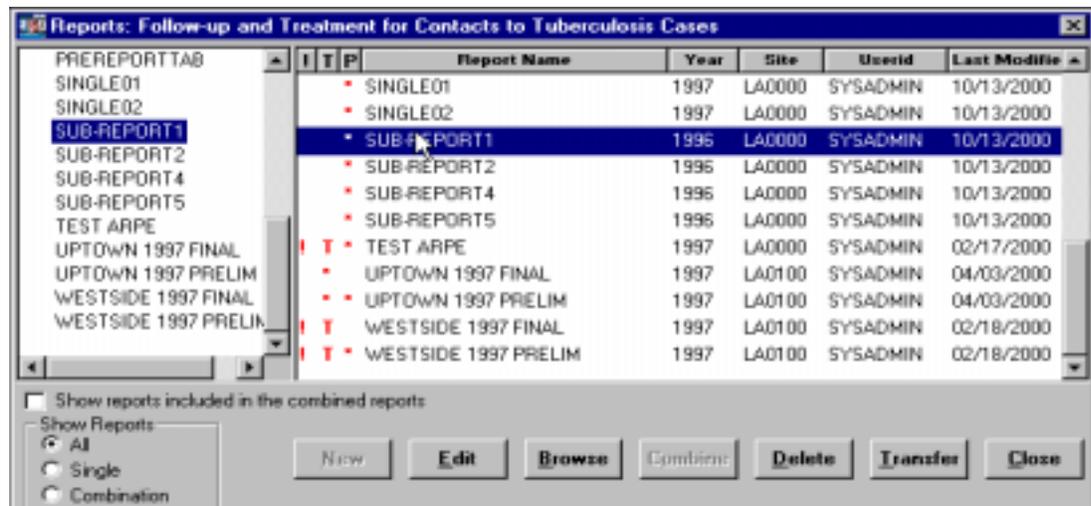
Or

Open the **Reports** menu and select either **Follow-up and Treatment for Contacts to TB Cases** or **Targeted Testing and Treatment for Latent TB Infection**.

3. Select a report in the Detail Pane and right-click with the mouse.
4. Select **Mark for Transfer**.

Or

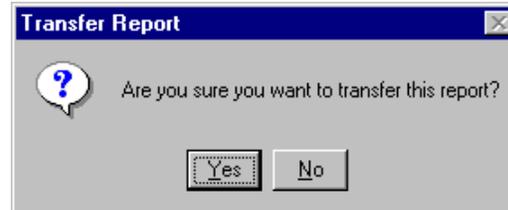
1. Select a report in the Detail Pane and click the **Edit** button.



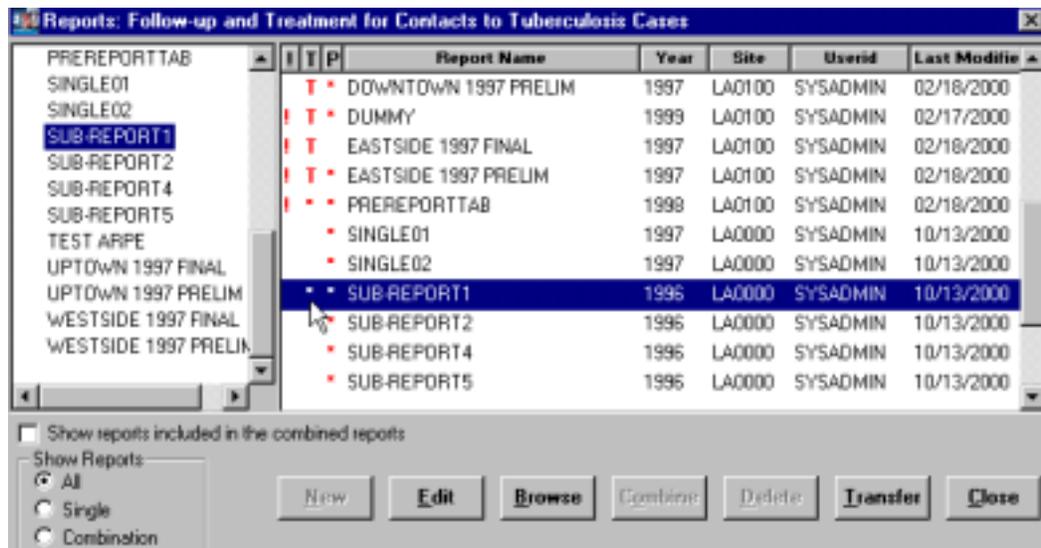
2. Click the **Mark for Transfer** button.



3. Click **Yes** to complete the mark for transfer operation. Click **No** to abandon the Mark for Transfer operation and return to the Edit window.



An asterisk '*' will appear in the 'T' column (Transfer Indicator) of reports that are successfully marked for transfer. **Note:** When a combination report is marked for transfer, all included sub-reports are also marked for transfer.



To remove 'Mark for Transfer' from a report, right click on the report and select **Unmark for transfer**, or click the **Edit** button and the **Mark for Transfer** button. The asterisk will disappear from the 'T' column. **Note:** A report cannot be unmarked for transferred if it has already been transferred.

Preparing the Transfer File

Use the Transfer button, located on the Reports Selector window, to create and prepare files for transport to the next level in the reporting hierarchy.

To prepare marked reports for transfer...

1. Open the **Program Evaluation** module.
2. Click either the **Follow-up and Treatment for Contacts to Tuberculosis Cases** or **Targeted Testing and Treatment for Latent Tuberculosis Infection** buttons on the toolbar.

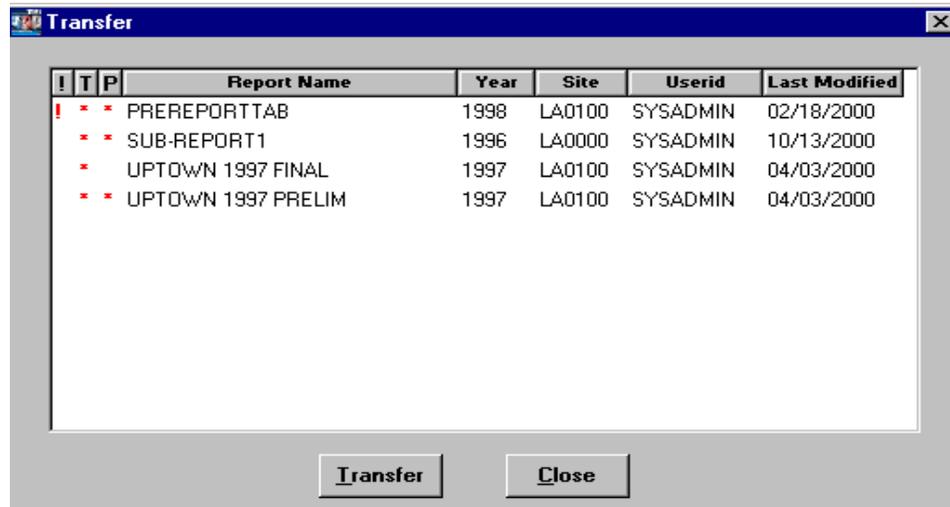


Or

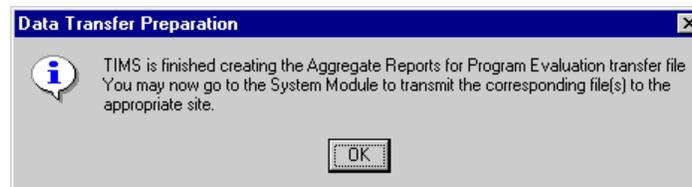
Open the **Reports** menu and select either **Follow-up and Treatment for Contacts to TB Cases** or **Targeted Testing and Treatment for Latent TB Infection**.

3. Click the **Transfer** button.

The Transfer window appears.



4. Click the **Transfer** button and an ARPE transfer file that includes the listed reports will be created.
5. Click **OK** to close the Data Transfer Preparation message box.



6. Click the **Close** button to close the **Transfer** window. A 'T' will appear in the 'T' column (Transfer Indicator) of reports that have been sent to the system module for transfer.

Transfer File to the Next Higher Level Site

The ARPE transfer file can be transmitted to the next site in the reporting hierarchy by using the transmission process in the System Module (See *Chapter 7—System Module* for more details on the ARPE transmission process).

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