Appendix B

Instructions for completing the

Behavior Monthlies

# Instructions for completing the
Behavior Monthlies

STEP 1: Enable macros

1. When you open the file, it will ask if you want to enable macros in the document. Click on **"Enable Macros."** If you disable the macros, the file will not work to your advantage.

STEP 2: Name each worksheet

1. An Excel **Workbook** is like a client's Program Book. When you open up the Program book, there are several tabs to organize information (e.g. ISP, BSP, PVO's, etc). Each **Worksheet** in an Excel Workbook is like a tab in a client's Program Book.

2. To organize your Excel Workbook, you will need to **re-name** each of the Worksheet tabs on the bottom of the workbook.

3. **NOTE: You will only rename the tabs titled "Month 1, Month 2, Month 3…." The tabs titled: Monthly, Yearly, Sleep Data, Data Analysis, IR, etc., <u>WILL NOT BE RE-NAMED</u>**

4. To complete this, **Right Click** the worksheet named "Month 1." A box will appear with several options. Highlight "Rename." Then, type the name of the month and hit "Enter." Repeat this process for all of the months.

    a. *Note: Typically "Month 1" would be the month that the client's ISP year started. However, as we are starting this process on 3/1/10, "Month 1" will be re-named "February." When an individual has their ISP, you will start a new workbook with the Month 1 corresponding to the beginning of their ISP year.*
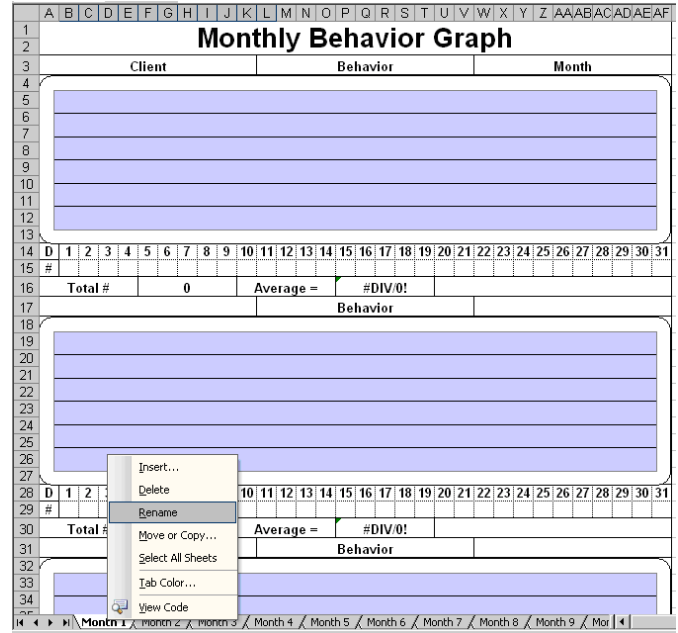
STEP 3: Enter data/client information/month into the worksheet

1. In the worksheet now labeled "February," you will need to populate the appropriate information for the following cells:

    a. Client   b. Behavior   c. Month   d. Raw Data

2. For **Client:** Enter the name of your client. *Remember, each workbook represents **one client's** data.*

3. For **Month:** Enter the month, represented by its first **3** letters. For example, *Feb for February, Mar for March, and so on.*

4. For **Behavior:** You will need to enter all of the **Functional Alternatives and Behaviors** that the client's BSP and RTR are currently addressing.

Enlarge the picture below to see demonstration.
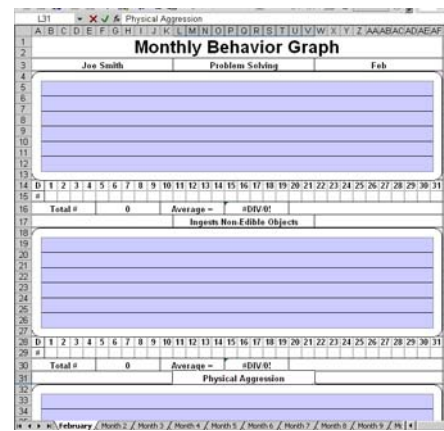
a. Enter the Functional Alternatives **First,**

b. **Then** start with the Maladaptive Behaviors (in the order of the RTR)

5. As you scroll down your worksheet, you will notice that the name of your client (in the example above, "Joe Smith,") and the Month automatically appear on each new page. As such, you will only have to enter this information once on the worksheet.

6. In addition, if you open the next corresponding month, in this case, March, you will see that the client's name and their behaviors have automatically transferred over.

a. The only new item that you will need to enter (besides raw data) is the name of the month to which the worksheet corresponds.


7. Finally, you will need to enter your raw data in directly beneath each behavior graph. You be entering the daily totals. For example, you will need to enter the daily total number of times that the client participating in Problem Solving on the 1st of the month….and so on.

8. As you may notice, the graphs will automatically chart the data for you. In addition, they will also tally the total number for the month, as well as the average.

9. You will repeat STEPS 2-3 for every month (as you have raw data).
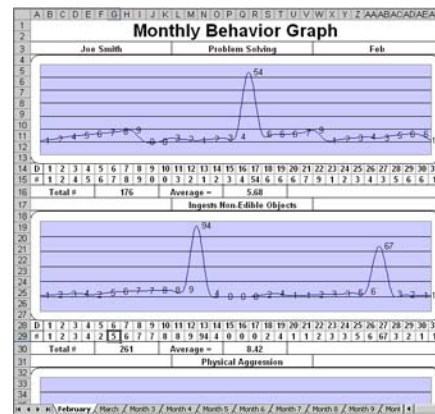
STEP 4: COMPLETING The monthly and yearly data

1. With this program, after completing steps 2-3, your yearly data is automatically completed.

a. **Note: The yearly data will replace the old "2 year data." However, keep the old records for reference.**

2. To see this, simply click on the "Yearly" tab at the bottom of the worksheet.

3. As you will see, the currently tracked behavior name automatically appears, as does the client's name. In addition, the yearly automatically charts the monthly total for February and will provide a Yearly total and average of behaviors.
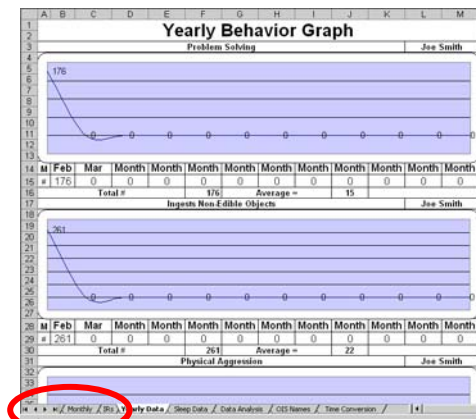
4. **Monthly:** Your monthly is also nearly completed with this program. Click on the "Monthly" tab in the Workbook. When you open it, it will look strange (but familiar).

5. Why does the Monthly look strange, but familiar? To ensure that this document is able to accommodate for the wide range of clients that we support, an excess of behavior graphs have been created. For instance, throughout one client's ISP year, they may only have 5 behaviors (and functional alternatives) that are being addressed, while another client may have up to 20. Technically, the monthly actually looks like the example:

6. What you will see is numerous rows for possible behaviors. This worksheet has been programmed with a Macro to automatically hide any rows that are not being used (hence, why it looks like it does above). This will allow for a cleaner, more professional document (and why you need to enable the Macros).

7. **Items that will already be entered into the monthly:**
   a. Tracked Behaviors and Functional Alternatives (from the Behavior Graphs)
   b. Total # of behaviors
   c. Average of behaviors
   d. Client Name
   e. Average hours of sleep
   f. Total # of PPIs (including Emergency)
   g. Total amount of time in a PPI (including Emergency)

The highlighted items e-g are automatically entered in another section of the Workbook. See Steps #5-6.

NOTE: Med Changes refer to Pysch Med Changes, **E PPI**, refers to Emergency PPI's and **OIS PPI Approval** refers to any individual who has a PPI that requires Steering Committee Approval.

8. **Items that you will need to manually enter into the monthly:**
   a. These are the same that you have done before
      i. Alteration Criteria
      ii. ISP and Meeting Date
      * You will also need to enter this into the Footer of the workbook. To complete this, go to the "View" tab and click on "Footer." A box will open. Click on "Custom Footer." In the box with "Client," type in the client's name, then type in the meeting date. Click "OK" and close. **Leave the Center Box as is.**
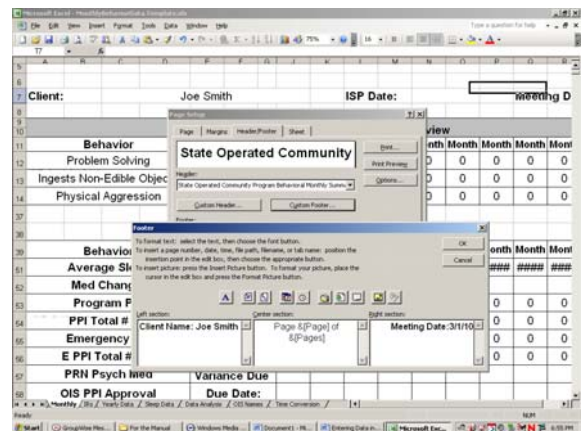
iii.   OIS PPI Approval
iv.   Psyc Med Changes
v.   Psychotropic PRN usage
vi.   Balancing Test information
vii.   Behavior Review Comments
➢   There is a new section titled "Emerging Behaviors." This is where you and the team can document and discuss any emerging behaviors that an individual may be engaging in.

STEP 5: Completing the IR review

1. As with the previous monthlies, you will continue to complete an IR review. However, this workbook will allow you to do in a way that will increase your abilities to analyze data in the future.

2. Open the "IR" tab. You will see a pretty straight-forward document.

3. As in the past, you will enter the date, behavior, type of PPI (Emergency or Approved) and the corresponding number of minutes that the client is in these.

4. What is different, is there is now a section for detailing the Time, Setting Events/Triggers and Staff Intervention. To complete the IR review proceed with the following:

    a. **Date:** Date of the incident
    b. **Time:** Time of the incident. Often there is only one incident report completed for several behaviors that happened during a specific time. In addition, there is often more than 1 PPI used to support an individual during these times. Use the time row to account for each separate behavior and PPI on a single IR.
    c. **Setting Event/Trigger:** This can be as long or short of a description that you want to give. *You can enlarge the cell as needed. To change the row height of one row, drag the boundary below the row heading until the row is the height that you want:*

    d. **Behavior:** This must be the Name of the Behavior as it appears in the BSP. For example, Verbal Aggression, Physical Aggression, etc.
    e. **Intervention:** This can be as short or as detailed as you would like.
    f. **PPI:** These will be standardized abbreviations. To view these, click on the tab, "OIS Names." For example, "LC" is a limb control.
        Note: *If an incident did not require the use of a PPI (or Emergency PPI) leave the cell blank. Do not input "0," "N/A" or anything else. If you do, the Excel formula will count it as a PPI and skew your monthly data.*

g. **Number of minutes for both Emergency and Approved PPIs:** This will need to be recorded as a decimal (very similar to the same system used for Time Capture). For example: a 10 second PPI will become .17 and so on. Click on the "Time Conversion" tab to find time equivalencies. The important thing to remember that the base for the time is **minutes**. Therefore, all time will need to be converted to minutes (e.g. seconds to minutes, hours to minutes)—**See picture to right**.

5. **Filtering:** By entering the IRs in the Excel workbook, you now have the option to analyze your data. To do this proceed with the following:

a. Highlight the rows (including titles) for "Date, Time, Setting Event/Trigger, Behavior, Intervention and all PPIs, with minutes."

b. Go to the "Data" button on your toolbar and click on "Filter," then "Auto Filter."

c. Once this is complete "arrows" will appear over your data. Click on the arrow next to "Behavior." A pull-down menu will appear with all of the behaviors that you have entered for the IR's. Click on any behavior that you want to review. For example, if you want to see how many physical aggressions an individual has had throughout the year, highlight "physical aggression." The document will only show the behaviors for "Physical aggression."

6. **How this helps with monthlies:** Once you enter the PPIs and the number of minutes in each of these on the IR sheet go back to the "Monthly" tab. You will see that the number of PPIs as well as the total number of minutes that an individual was in these is already entered. As a result, you don't have to worry about tallying these up separately.

   a. **Note:** The number of minutes for the PPI's and Emergency PPI's will show up in the following format: hh:mm:ss. For example, 1:15:07, or 1 hour, 15 minutes, and 7 seconds.

STEP 6: Sleep Data

1. Sleep Data is an important part of understanding an individual's behaviors (i.e. increases/decreases). To complete the sleep data, open the "Sleep Data" tab on the Worksheet.

2. You will notice that the individual's name already appears on the graphs, as does the month.

3. You will enter daily totals of hours of sleep, just as you entered your raw data in the behavior graphs.

4. The graphs will automatically tabulate the total number of hours for the month. The average will automatically appear in the monthly section.
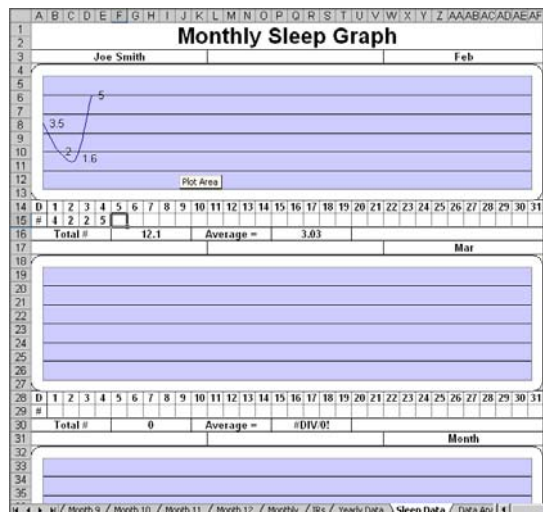
STEP 7: Print out for the Monthlies

1. This Excel workbook is meant to as a means to complete several of your job expectations at once: Behavior Graphs, Sleep Data, and Monthlies. Primarily, this document is meant to expedite the data entry for the monthlies.

2. When you prepare your monthlies, you will print out the following documents to provide to the Site Manager to combine with the current Vocational and Site Manager sections of the monthly:

   The worksheet in the "Monthly" tab and the Corresponding month in the "IR" tab. <u>Do not print the entire document in the IR tab. Print just the pages that correspond to the appropriate month for the meeting.</u>