



Full Service Partnership (FSP) Data Collection & Reporting (DCR) Data Analysis Training

*Training Slides and Presenter's Notes for
Analyzing Data and Creating Reports from DCR
Data Extracts*

The following document was funded by the Mental Health Services Oversight and Accountability Commission.

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Acknowledgements

We would like to acknowledge the input and materials from various people and organizations. Many documents created by the California Department of Mental Health (DMH) were used as sources and resources for the production of this training.

Due to the Governor's Proposed Budget for FY 2012-13 to eliminate the Department of Mental Health (DMH), MHSa programs and functions will be transferred to other departments. It is proposed that the DCR system will be administered by another department. Since this document was developed at the time DMH maintained the DCR system, DMH is named in the references and links throughout this document. Because the new state entity is not known, whenever "DMH" is used in this document it is intended to also include the new state entity that will take on DMH's responsibilities.

Definitions and Abbreviations

<u>Term</u>	<u>Meaning</u>
3M	Quarterly Assessment
ADL	Activities of Daily Living
Adult	Adults of Ages 26 - 59
BPD	Browse Partner Data
CA-RW	County Administrator, Read/Write
Child/Youth	Children of Ages 0 - 15
CSI	Client Services Information
CSV	Comma-Separated Values
DCR	Data Collection and Reporting
DMH	California Department of Mental Health
FSP	Full Service Partnership
FY	Fiscal Year
HIPAA	Health Insurance Portability and Accountability Act
IADL	Instrumental Activities of Daily Living
IIF	Immediate If Function
ITWS	Information Technology Web Services
KET	Key Event Tracking
MH	Mental Health
MHSA	Mental Health Services Act
MHP	Mental Health Plan
Older Adult	Older Adults of Ages 60+
PAF	Partnership Assessment Form
PHI	Protected Health Information
PLD	Partner-Level Data
Partner	A Client of the Full Service Partnership
RO	Read Only
RPR	Run Partner Report
RW	Read/Write
SB	Security Breach
SQL	Structured Query Language
SSA	State System Administrator
TAY	Transitional Age Youth (Ages 16 – 25)
TOC	Table of Contents

Introduction

This training curriculum is designed to be used as a tool for training staff to use the DCR data extract files to evaluate and analyze FSP data. Trainers can use the PowerPoint presentations available together with this document's presenter's notes to perform employee trainings. Alternatively, employees can follow this manual's slide handouts with text narrative for guided self-instruction to perform the analyses.

This training curriculum covers aspects related to extracting data from the DCR, importing data into Microsoft Access or Microsoft Excel, and building analyses and reports. A separate training curriculum addresses using the features of the FSP DCR to submit FSP data.

This training curriculum is intended for any person who utilizes the FSP DCR data extracts. This training requires users to download the Partner Level Data (PLD) Templates from the Information Technology Web Services (ITWS) website and is best suited for analysts who have general knowledge of Microsoft Excel, Microsoft Access and the formulas used by these applications. An outline of the training curriculum appears below.

➤ **FSP Data Analysis Training Curriculum Outline:**

- **Downloading FSP DCR Data**
 - Data Extraction
 - Overview of DCR Data Extract Files
- **Utilizing the Partner-Level Report Templates**
 - Importing New Data
 - Utilizing the Browse Partner Template
 - Utilizing the Run Partner Report Template
- **Developing the Analytical Report in Access from Application Note #1**
 - Creating Supporting Queries
 - Basic Statistical Analysis Formulas
 - Presenting Data in a Report
- **Developing the Analytical Report in Excel from Application Note #1**
 - Creating New Fields
 - Generating a Pivot Table
 - Statistical Measures by Partner
 - Statistical Measures for All

FSP Data Analysis Training

This training was funded by the Mental Health
Services Oversight and Accountability Commission
(MHSOAC).

Training Overview

1. Download FSP Data from DCR
2. Import FSP Data to PLD Templates
3. Generate Standard Reports
4. Create New Reports

This training covers these main areas of the FSP DCR User Manual (completed 1/17/2012) , the Partner-Level Data (PLD) Templates User Manual (completed 1/19/2012) and the Application Notes (completed 4/5/2012).

Reference Materials

- FSP DCR Data Dictionary (9/15/2011)

Home	Systems	MHSA Information	Functions	Utilities	Support	Log
		MHSA Information				
		System Messages Contact Us CSI Information Frequently Asked Questions IT Meetings Technical Information User Manuals and Instructions Reference Information (Aid Codes) Related Links Search				
Title						Last Updated
System Requirements						
Original DCR SRS						04/03/06
Online DCR R						04/09/07
Personal Com						08/14/07
Design and Te						
Internet Brows						07/10/07
DCR Data Model Options Analysis						01/26/06
MHSA DCR Data Model						02/08/06
FSP DCR Data Dictionary						02/16/12
XML Information						

An updated version of the FSP DCR Data Dictionary was completed on 9/15/2011, and it can be accessed on ITWS through the **MHSA Information** menu, by selecting the **Technical Information** submenu and then clicking to download the **FSP DCR Data Dictionary**.

Reference Materials

- FSP DCR User Manual (completed 1/17/2012)

The screenshot shows the ITWS MHSA Information page. The navigation menu includes Home, Systems, MHSA Information, Functions, Utilities, Support, and Logout. The MHSA Information submenu is expanded, showing options like System Messages, Contact Us, CSI Information, Frequently Asked Questions, IT Meetings, Technical Information, and User Manuals and Instructions. The User Manuals and Instructions option is highlighted with a red box. Below the menu, there is a table with columns for Title and Last Updated. The table lists various documents, including the DCR User Manual, which is also highlighted with a red box.

Title	Last Updated
Instructions	
Importing XML into an Access Database	06/18/07
DCR Client Level Report Template	02/16/12
DCR User Manual	02/16/12
March_8th_Webcast_CSI.ppt	03/07/06
March_8th_Webcast_FSP.ppt	03/07/06
March_8th_Webcast_FSP_handouts.pdf	03/07/06

A FSP DCR User Manual was created on 1/17/2012, and it can be accessed on ITWS through the **MHSA Information** menu, by selecting the **User Manuals and Instructions** submenu and then clicking to download the **DCR User Manual**.

Reference Materials

- PLD Templates and User Manual (1/19/2012)

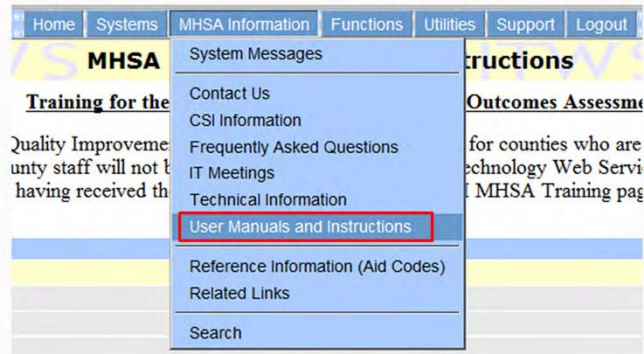
The screenshot shows the ITWS MHSA Information page. The navigation menu includes: Home, Systems, MHSA Information, Functions, Utilities, Support, and Logout. The MHSA Information menu is expanded, showing submenus: System Messages, Contact Us, CSI Information, Frequently Asked Questions, IT Meetings, Technical Information, and User Manuals and Instructions. The User Manuals and Instructions submenu is highlighted, showing: Reference Information (Aid Codes), Related Links, and Search. The main content area is titled "Training for the MHSA Outcomes Assessment" and contains text about the DMH Performance Outcomes and Quality Improvement Partnership (FSP) Outcomes Assessment data. Below the text is a table with the following columns: Title, Last Updated, and a link to download the document.

Title	Last Updated	
Instructions		
Importing MHSA info into Access Database	06/18/07	
DCR Client-Level Report Template	02/16/12	
DCR User Manual	02/16/12	
CMH Webcast Training: New Reporting Requirements for DCR/MHSA		
March_8th_Webcast_CSI.ppt	03/07/06	
March_8th_Webcast_FSP.ppt	03/07/06	
March_8th_Webcast_FSP_handouts.pdf	03/07/06	

Partner Level Data Templates were created on 1/19/2012, and the Access Database and User Manual can be accessed on ITWS through the **MHSA Information** menu, by selecting the **User Manuals and Instructions** submenu and then clicking to download the **DCR Client-Level Report Template**.

Reference Materials

- Application Notes (completed 4/5/2012)



An Application Notes document with instruction for using Microsoft Excel and Microsoft Access to create reports from FSP data downloads was created on 4/5/2012, and the document can be accessed on ITWS through the **MHSA Information** menu, by selecting the **User Manuals and Instructions** submenu. (Note: The document had not been posted at the time of this publication.)

Downloading FSP Data from the DCR

This Section Covers:

- Downloading FSP Data Files
- CSV Files
- XML Files

This section covers downloading CSV and XML file types.

Download File Options

- Users can download the data in two file forms:
 - XML (Extensible Markup Language) – 3 Files
 - PAF
 - 3M
 - KET
 - CSV (Comma Separated Values) – 4 Files
 - PAF Residential Fields
 - PAF Non-Residential Fields
 - 3M
 - KET

The FSP DCR offers a function for users with the CA-RW role to download all of the partner data to which they have access through their group. The data can be downloaded as XML or CSV files. The XML data downloads into three files (a PAF, a KET and a 3M file). The CSV data downloads into four files (a PAF Non-Residential with all domains EXCEPT Residential, a PAF Residential with residential domain information only, a KET and a 3M file). The XML or CSV files can then be used to perform data analysis and data reporting in other applications such as MS Excel, MS Access, SPSS or SAS.

Download Files

- Log into ITWS and access the FSP DCR application **Transfers** menu to download FSP data



As seen in this slide, navigate to the **Admin** menu and **Download FSP Data Files** submenu, and select the **New Download** button.

Refer to the FSP DCR User Manual (completed 1/17/2012) at Chapter 12 “Data Extraction” beginning on page 155 for step-by-step instructions.

Download Files

- Select File Type
- Select Form Type
- Enter Date Range (optional)

The screenshot shows the 'Department of Mental Health MHS Data Collection and Reporting' web application. The 'Data Download' section is active. A red box labeled '3.' highlights the 'Download Format' dropdown menu set to 'CSV Flat File' and the 'Form Type' dropdown menu set to 'PAF (Residential information only)'. Another red box labeled '4.' highlights the 'Date Range' field with a start date of '10/01/2008' and an end date of '06/30/2009'. A third red box labeled '5.' highlights the 'Run' button at the bottom left of the form. The interface includes a search bar, navigation tabs (Home, Partnerships, Transfers, Admin, Help), and a 'Log out' link.

As seen in this slide as step 3, select the “CSV Flat File” or “XML” file type from the **Download Format** drop-down box. Make a selection in the **Form Type** drop-down box to select one of the available forms to include in the download.

As seen in this slide as step 4, enter a date range for data to be returned. The date range for the PAF restricts records based on **Partnership Date**. The date range for the KET and 3M records restricts based on the date the form was completed (**Date Completed** field). If a date range is not entered, all data will be returned.

As seen in this slide as step 5, select the **Run** button to return the file. You will notice that the web browser will indicate the request is running. It may take several minutes for the data file to download.

Currently, the FSP DCR will only support downloads of files of approximately < 40 MB. Larger files may cause the FSP DCR to produce an error after several minutes. Reduce the size of the file by restricting to a smaller date range, and retry the download.

Save the file, and return to the menu to download the other data files. For XML file type, download 3 files including the PAF, KET and 3M. For CSV file type, download 4 files including the PAF-Residential, PAF-Non-Residential, KET and 3M.

Refer to the FSP DCR User Manual (completed 1/17/2012) at Chapter 12 “Data Extraction” beginning on page 155 for step-by-step instructions.

CSV Data File

- Values are separated by commas
- Can export into Microsoft Excel, Access, SPSS, SAS, etc.

```

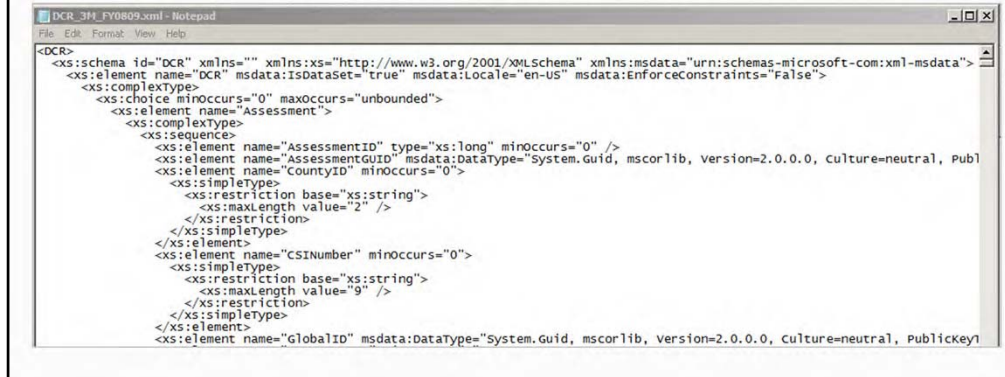
zzz_DCR_PAFRes.csv - Notepad
File Edit Format View Help
AssessmentGUID,CountyID,CSINumber,GlobalID,CountyFSPID,Name,PartnershipDate,AssessmentDate,DateOfBirth,CSIDateOfBirth,Gender,ETI
Twelve,Homeless_PastTwelveOccurrences,Homeless_PastTwelveDays,Homeless_PriorTwelve,IndividualPlacement_PastTwelveOccurrences,Indiv
t_PastTwelveDays,CommunityTreatment_PriorTwelve,ResidentialTreatment_PastTwelveOccurrences,ResidentialTreatment_PastTwelveDays,Re
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aa16c5ca-b20f-4e24-b193-7cdd84f73b04,89,000000106,0f3e5f66-89ef-4657-8919-858ab0f1f7ff,000000106,,Jane, Jane 028,,12/3/2010,12/3
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```

This slide displays an example of the CSV file contents opened in the Notepad application.

XML Data File

- Values and data structure defined
- Can import into Microsoft Access, SQL Server or other relational database supported environment.



```
<DCR>
<xs:schema id="DCR" xmlns="" xmlns:xs="http://www.w3.org/2001/XMLSchema" xmlns:msdata="urn:schemas-microsoft-com:xml-msdata">
<xs:element name="DCR" msdata:IsDataSet="true" msdata:Locale="en-US" msdata:EnforceConstraints="False">
<xs:complexType>
<xs:choice minOccurs="0" maxOccurs="unbounded">
<xs:element name="Assessment">
<xs:complexType>
<xs:sequence>
<xs:element name="AssessmentID" type="xs:long" minOccurs="0" />
<xs:element name="AssessmentGUID" msdata:DataType="System.Guid, mscorlib, Version=2.0.0.0, Culture=neutral, Publ
<xs:element name="CountyID" minOccurs="0">
<xs:simpleType>
<xs:restriction base="xs:string">
<xs:maxLength value="2" />
</xs:restriction>
</xs:simpleType>
</xs:element>
<xs:element name="CSINumber" minOccurs="0">
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</xs:simpleType>
</xs:element>
<xs:element name="GlobalID" msdata:DataType="System.Guid, mscorlib, Version=2.0.0.0, Culture=neutral, PublicKey
```

This slide displays an example of the SML file contents opened in the Notepad application.

Importing CSV files into the Partner-Level Data Templates

This Section Covers:

- Overview of the PLD Templates
 - Browse Partner Data Template
 - Run Partner Report Template
- Encryption of PLD Templates
- Importing Data Extracts to PLD Templates

This section covers an overview, encryption and data importing for the PLD Templates.

PLD Templates Overview

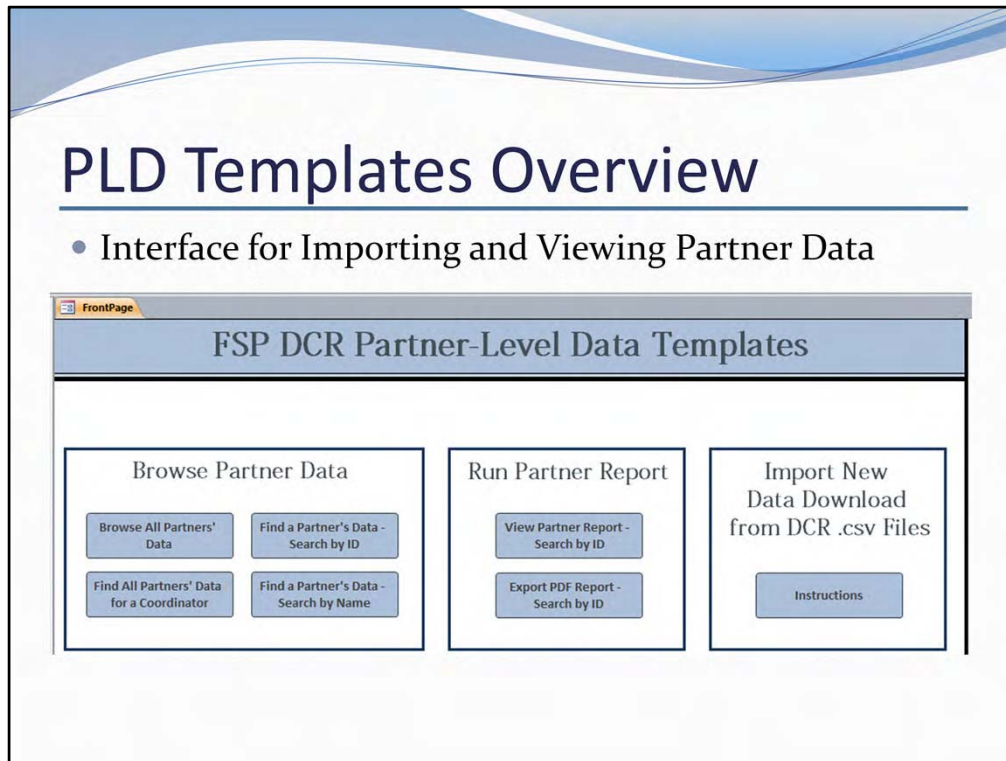
- Provides a Data Extract Warehouse
- Facilitates Data File Import
- Contains Pre-Defined Tables and Field Definitions
- Contains an Automated Process for Replacing Old Extracts with New Extracts
- Provides Form Layout of Each Partner's Complete Data
- Provides Reports of Each Partner's Complete Data
- Provides an Environment for Creating New Reports

The Partner-Level Data (PLD) Templates act as a data extract warehouse and provide fully defined tables to which the DCR CSV files can be easily imported. The PLD Templates also provide tools and instructions to facilitate the import of the DCR CSV files into Microsoft Access.

The PLD Templates contain pre-defined tables which incorporate the coding values for the fields within the CSV files, according to the DCR FSP Data Dictionary. The PLD Templates also include dimension tables which can be used to translate the coding values within the FSP data fields into useful terms and categories. All of these tables are defined already for users utilizing the PLD Templates. The PLD Templates also provide an automated process for clearing and updating data for new DCR CSV downloads.

The PLD Templates are designed to provide a comprehensive summary of a partner's Full Service Partnership (FSP) Data Collection and Reporting System (DCR) partnership data for the purposes of data quality. The PLD Templates display and organize domain data for the partnership's current status and history in the last 12 months before joining the FSP. (Information on the time prior to the last 12 months before joining the FSP is not included in these templates.) All administrative changes, such as program or coordinator changes, are also displayed within PLD Templates.

The Application Notes covered later in this training will exemplify how the PLD Templates provide an environment for creating new reports from the FSP data files.



When the PLD Templates file is first opened, a front page is displayed. From the front page, there are two main templates which can be accessed through the PLD Templates. There is also a section for clearing the old data extract and importing a new data extract.

The two templates available in the PLD Templates are:

1. Browse Partner Data (BPD) Template
2. Run Partner Report (RPR) Template

Browse Partner Data Template

FrontPage Partner Info

San Francisco Partner Level Report

Data Displayed Through: 10/06/2011

PARTNER INFORMATION

Partner Name	Doe, John	Partnership Date	2/20/2010	Days in Partnership	281
County Partner ID		Partnership Status	Inactive		
Global ID		Date Status Change	11/28/2010		
CSI Number		Program	3200, Citywide Adult		
Gender	M				
Age Group	Adult				
DCR Date of Birth	1/1/1965				
CSI Date of Birth	1/1/1965				
CSI New Race		Coordinator ID			
		Provider Site ID			
		PAF Status	Complete		
		Referred By	Jail / Prison		
CSI Old Race					
Hispanic	N				

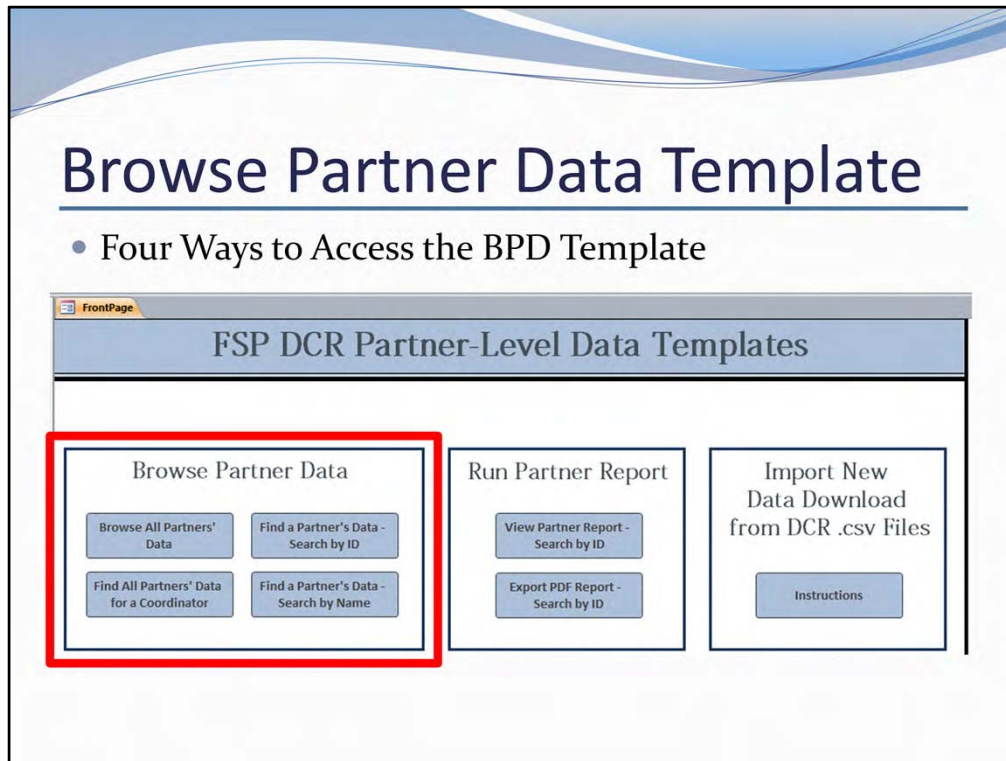
DOMAIN DATA FOR:

Total 3Ms Due: 3

3Ms	Admin Changes	D1: Residential	D2: Education	D3: Employment	D4: Financial	D5: Legal	D6: Emergency	D7-D8: Health Substance	D9: ADL	D10: IADL
-----	---------------	-----------------	---------------	----------------	---------------	-----------	---------------	-------------------------	---------	-----------

The BPD template allows users to browse through the data of all of the partnerships. As seen in this slide, the BPD template displays an overview of the partnership information and a tab for each domain.

By selecting each tab, users can review all of the FSP data reported for a partnership. Alternatively, users can select one tab of domain information, such as the **D5: Legal** domain for example, and then scroll through each partnership to browse just the data reported for that domain (e.g., legal) for each partnership.



There are four buttons on the front page to access the BPD Template, which will help filter the number of partnerships displayed in the template.

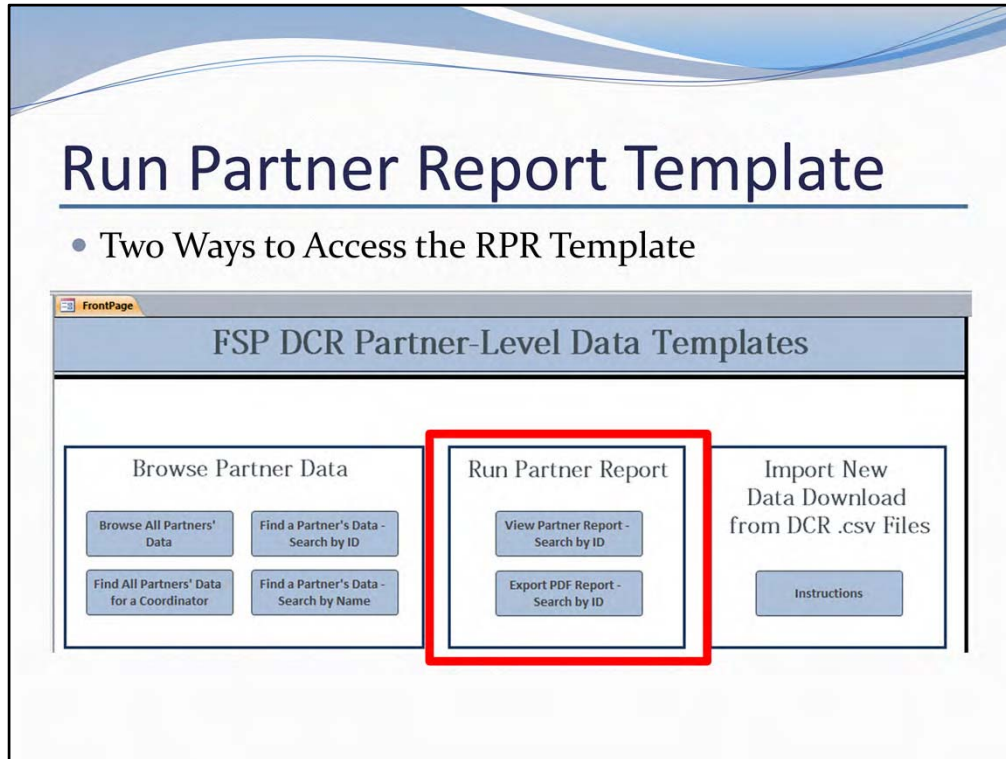
The Four Ways to Access the BPD Template:

1. **Browse All Partners** displays all partnerships downloaded from the FSP DCR.
2. **Find All Partners' Data for a Coordinator** displays all partnerships for a coordinator based on entering any part of the coordinator ID.
3. **Find a Partner's Data – Search by ID** displays the partnership data for a partner by CSI number or by FSP DCR Global ID.
4. **Find a Partner's Data – Search by Name** displays the partnership data for a partner based on entering any part of a partner's name.

Run Partner Report Template

The screenshot displays a 'Partner Level Report' template with four distinct sections, each representing a different domain of partnership data. The top-left section, 'Partnership Information', contains fields for basic details like 'Partnership Name', 'Partnership Type', and 'Partnership Status'. The top-right section, 'Financial Performance', includes a table for 'Financial Performance' with columns for 'Year', 'Revenue', 'Profit', and 'Loss'. The bottom-left section, 'Operational Performance', features a table for 'Operational Performance' with columns for 'Year', 'Units Produced', 'Units Shipped', and 'Units Sold'. The bottom-right section, 'Compliance Performance', includes a table for 'Compliance Performance' with columns for 'Year', 'Compliance Score', 'Compliance Status', and 'Compliance Comments'. Each section is labeled with its respective domain name and includes a 'Page 1 of 1' indicator at the bottom.

The RPR template produces a printable report of one partnership's data. As seen in this slide, the RPR template displays an overview of the partnership information in a multi-page report which is separated into sections by domain.



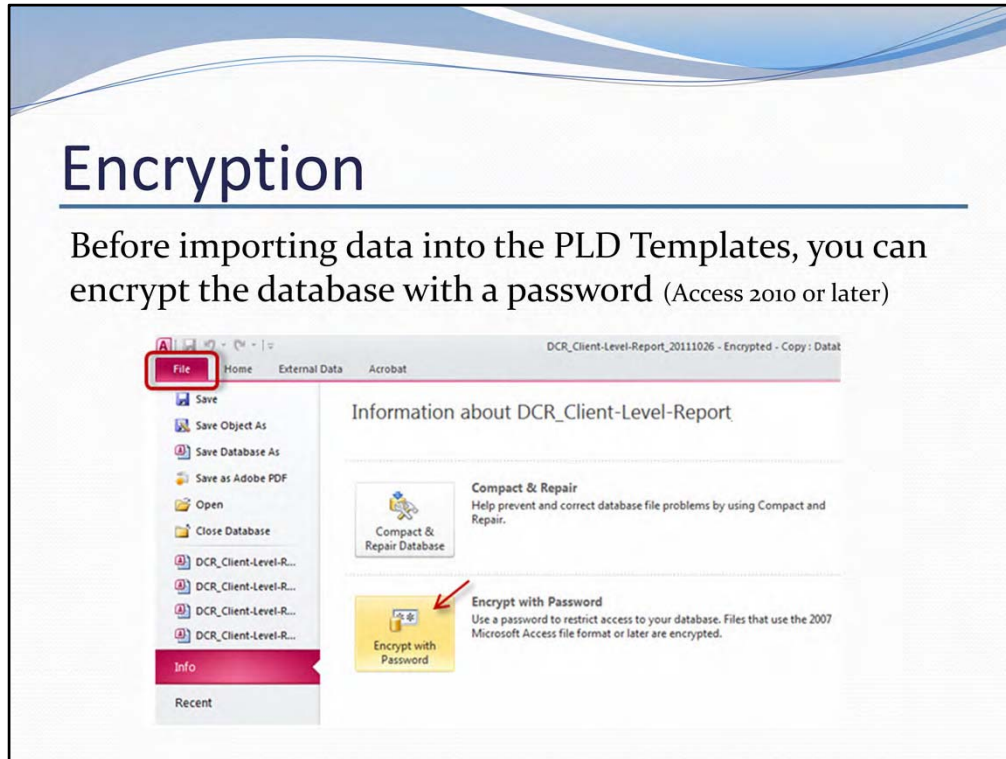
Users can choose to view the partnership report online, print the report or save a PDF of the report on their secure drive/network. A user must have available either the CSI number or the Global ID of a partnership in order to access this template. There are two buttons to launch the RPR template.

The Two Ways to Access the RPR Template:

1. **View Partner Report – Search by ID:** Displays a printable partnership data report for a partnership by CSI number or by FSP DCR Global ID.
2. **Export PDF Report – Search by ID:** Saves a partnership data report as a PDF at a chosen location on the user's drive/network.

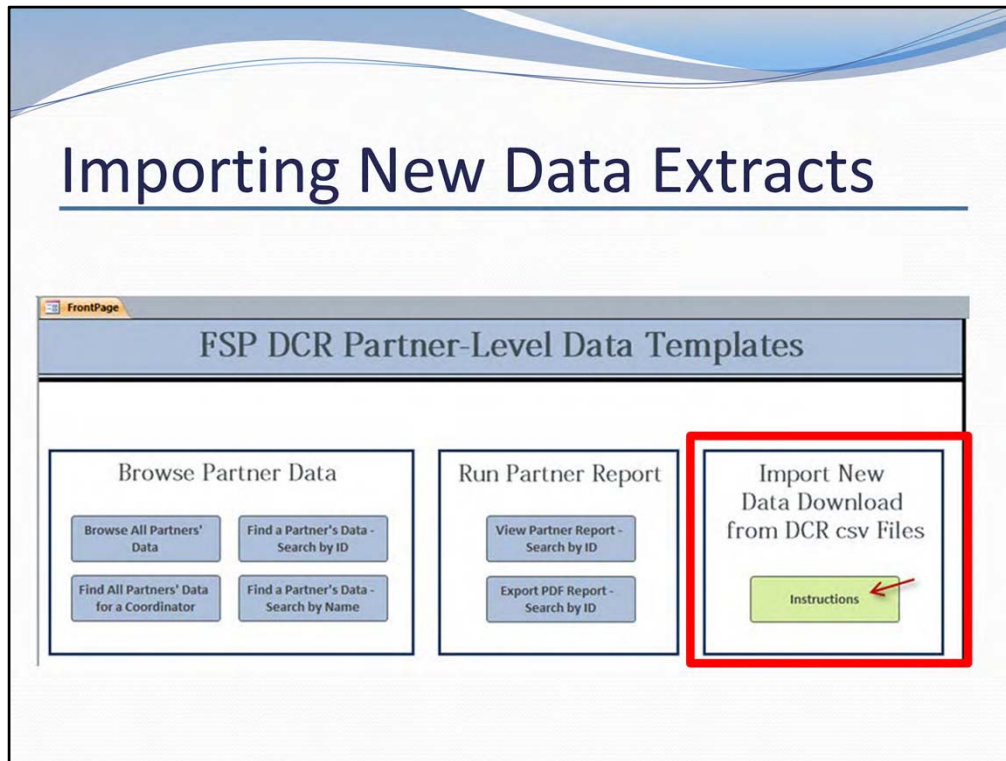
Encryption

Before importing data into the PLD Templates, you can encrypt the database with a password (Access 2010 or later)



The PLD templates come empty of data and equipped with an encrypted password, which will be provided to each Mental Health Director. The encrypted password can be changed. It is most efficient to decrypt and re-encrypt the PLD templates when they are clear of data.

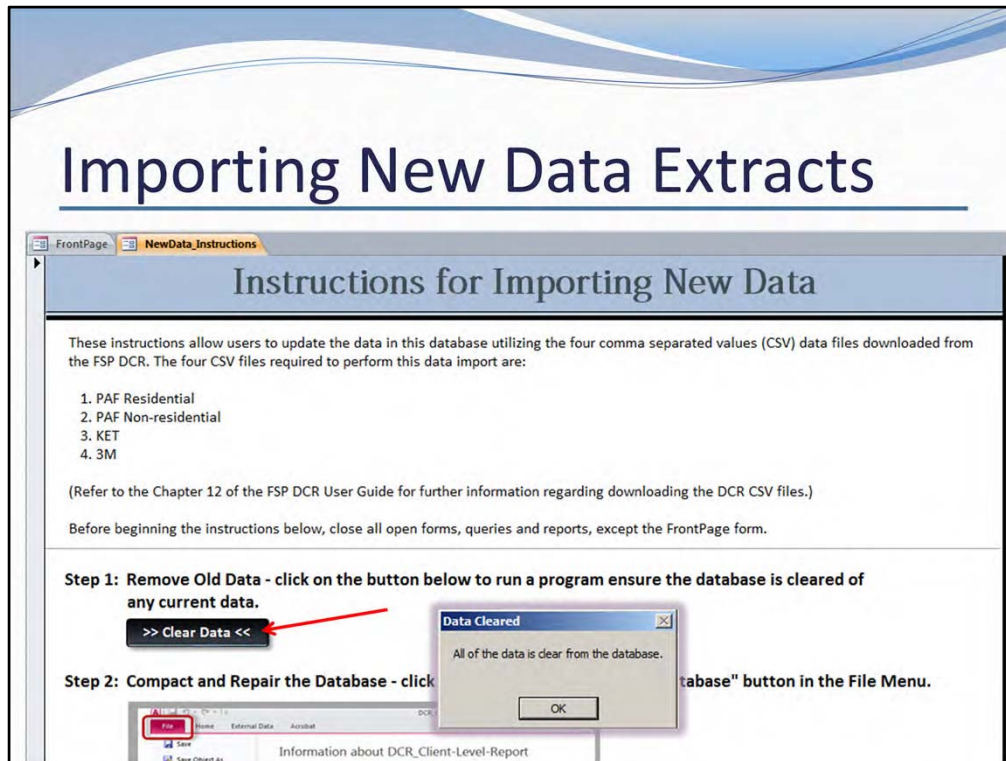
Refer to the PLD Templates User Manual (completed 1/19/2012) at Chapter 1 “Changing the Encrypted Password” beginning on page 10 for step-by-step instructions.



As mentioned previously, the PLD Templates come empty of data. It is recommended that users store an empty copy of the PLD Templates as a backup in the event that Microsoft Access file corruption issues arise while utilizing the PLD Templates. The PLD Templates are designed for use with the DCR CSV files, which can be downloaded from the online FSP DCR. Users must use the downloaded data files from the online FSP DCR application.

The PLD Templates are designed to work with one entire set of the four downloaded FSP DCR CSV files (PAF Residence, PAF Non-Residence, KET and 3M) at a time. Therefore, when a new updated set of files is downloaded for use with the templates, the old data must be cleared from the database.

With the PLD Template open in Microsoft Access, as seen in this slide, select the **Instructions** button from the front page.



After opening the instructions for importing new data, perform Step 1 from the instructions to clear the data from the database. By selecting the **[>> Clear Data <<]** button, a macro will run to clear all of the existing data in the database. If no data exists in the database, performing this step will not harm the PLD Templates. As seen in this slide, a pop-up message will alert you when the process is complete.

Note: Existing data must be cleared before using the PLD Templates with new data downloads. If it is desired to use the PLD Templates with both the historic and current sets of downloaded DCR CSV files, then a copy of the PLD Templates file can be made before clearing the historic data such that one file will contain the historic data and the other will be cleared and used to import the current data.

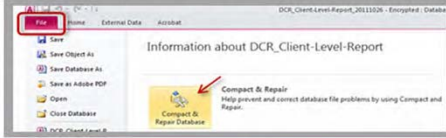
Importing New Data Extracts

FrontPage NewData_Instructions

Step 1: Remove Old Data - click on the button below to run a program ensure the database is cleared of any current data.

>> Clear Data <<

Step 2: Compact and Repair the Database - click on the "Compact and Repair Database" button in the File Menu.

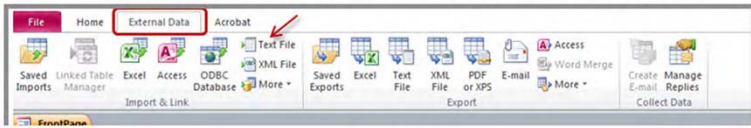


Information about DCR_Client-Level-Report

Compact & Repair
Help prevent and correct database file problems by using Compact and Repair.

Step 3: Import New Data Files (previously downloaded from the FSP DCR).

■ As seen in the image below, select the External Data tab above and click on the Text File to invoke the import wizard.

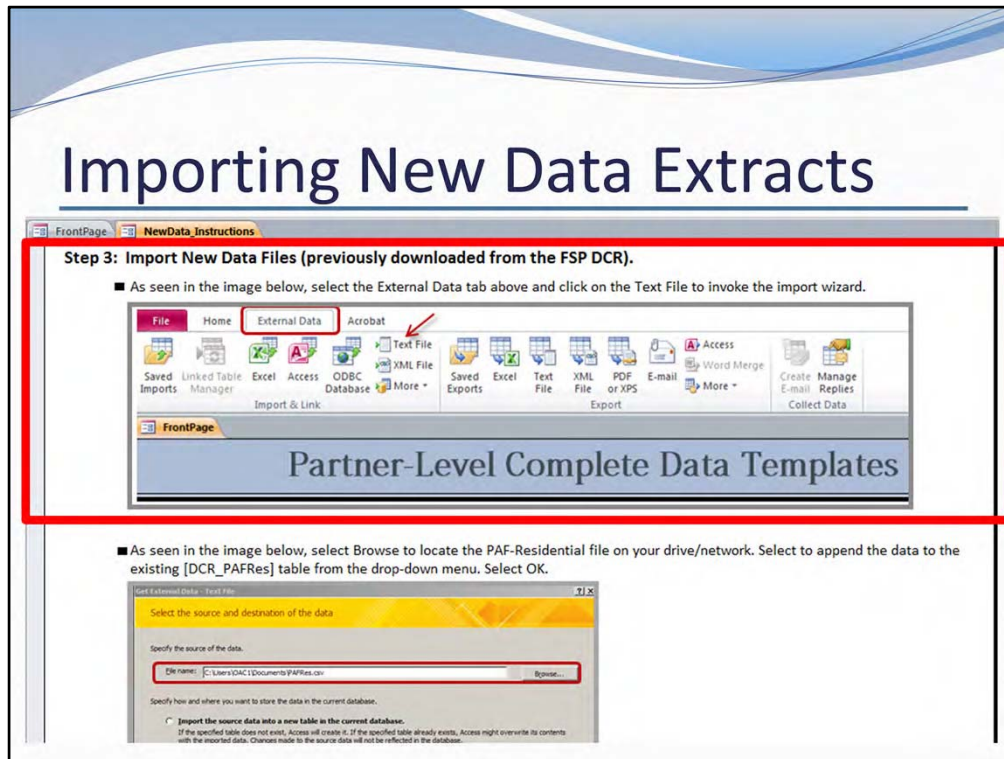


File Home External Data Acrobat

Text File

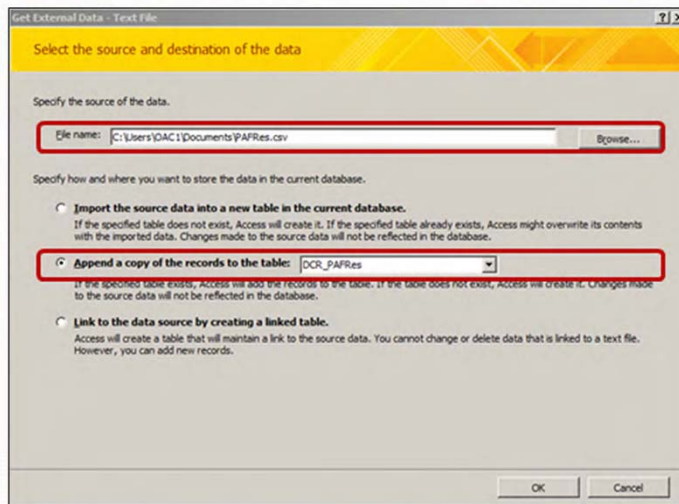
Import & Link

Perform Step 2 to compact and repair the empty PLD Templates. Microsoft Access may close the **Instructions** tab during the compact and repair process. Simply re-open the tab by selecting the **Instructions** button on the front page and continue the data import process.



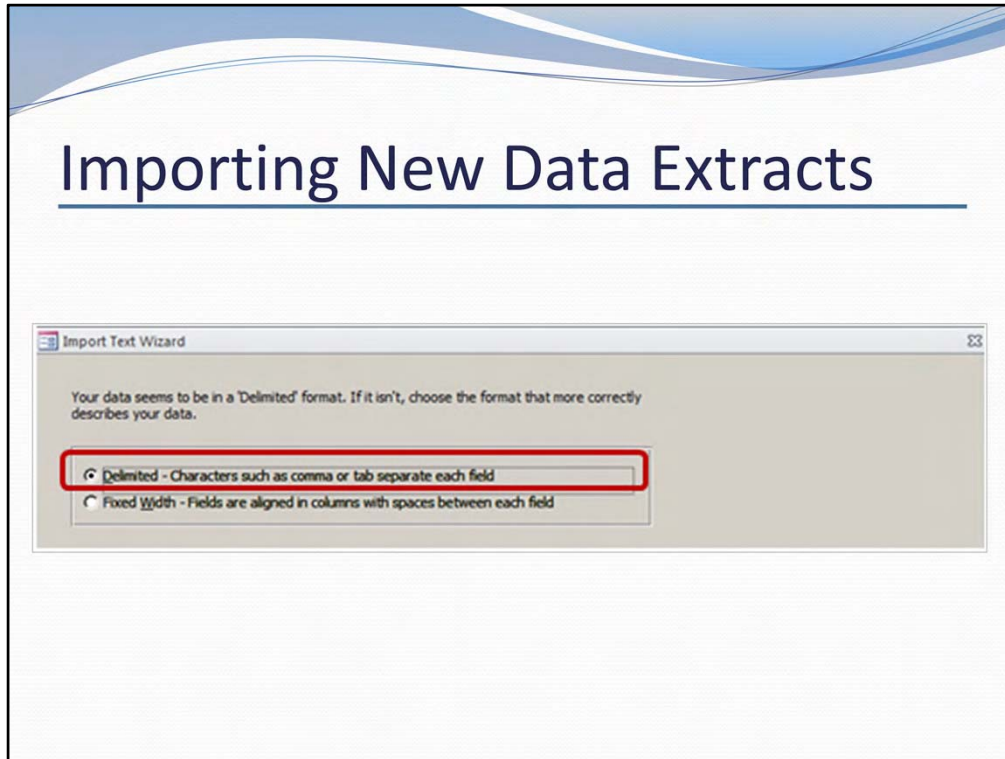
Perform Step 3 to import the current data files of FSP DCR data. Select from the menu **External Data** and then **Text File** in the **Import & Link** section.

Importing New Data Extracts



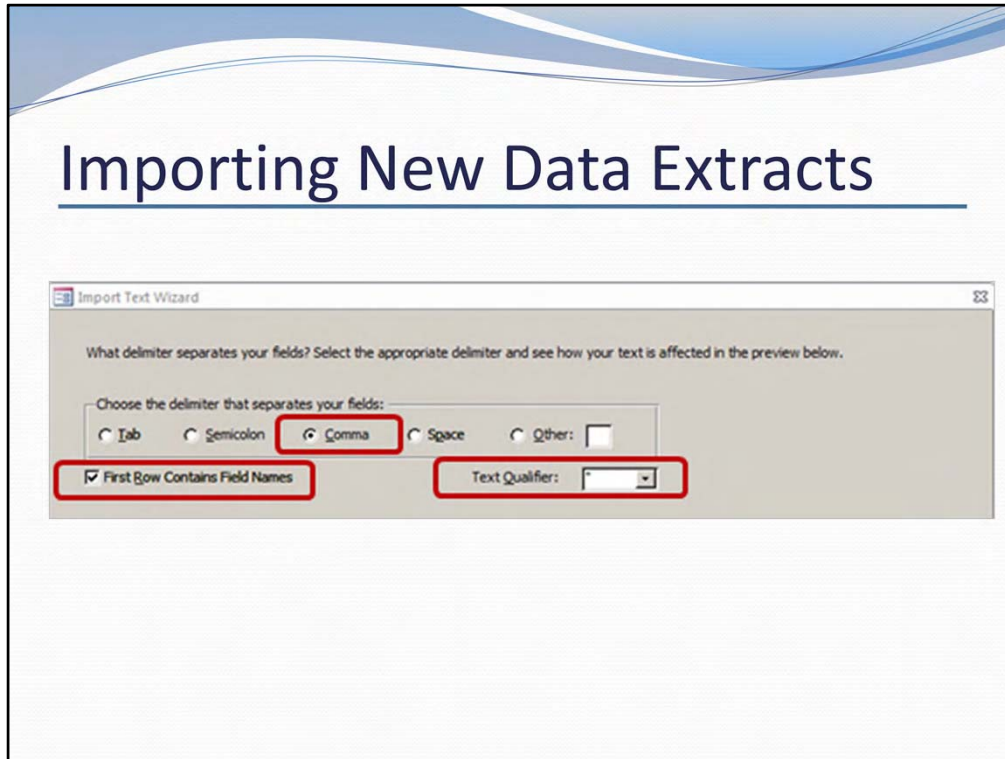
As seen in this slide, select **Browse** to locate the PAF-Residential file you downloaded from ITWS to your drive/network. Select to append the data to the existing **[DCR_PAFRes]** table from the drop-down menu. Select **OK**.

Importing New Data Extracts



As seen in this slide, select the **Delimited** toggle in the following screen. Select **Next**.

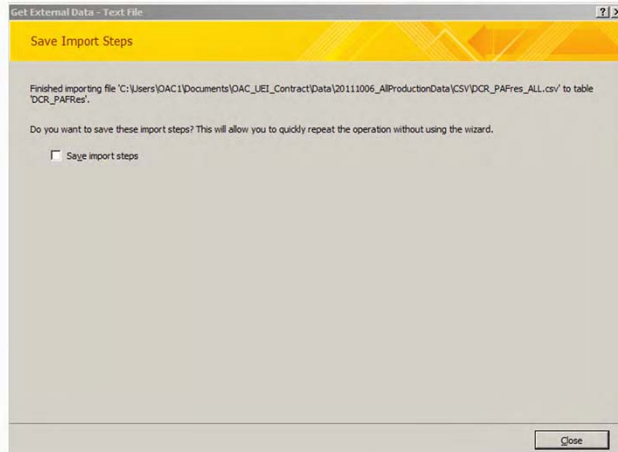
Importing New Data Extracts



As seen in this slide, select the **Comma** radio button, check the **First Row Contains Field Names** box, and set the **Text Qualifier** to the quotes symbol. Select **Finish**.

Importing New Data Extracts

- You will be alerted here if there were errors in the import



As seen in this slide, after each file is imported, a pop-up screen will alert you that the process is complete. The pop-up screen will also alert you if any errors were present in the import. Any errors from the data import will be saved in a table noted on the pop-up screen. (It is not necessary to save import steps.)

Note: The “CreatedDate” from the 3M CSV file may be corrupt in the FSP DCR data downloaded file. Although all of the other fields will import correctly, the “CreatedDate” field may not import with each 3M record. **This is okay and it will not affect the use of the PLD Templates.** If this occurs, the pop-up screen will alert you that there were errors on import, and the table of errors can be reviewed. A review of the table of errors will show that the only field with error was the “CreatedDate” field because of a “Type Conversion Failure”.

Errors that occur during data import can be reviewed in the Microsoft Access table generated from the import process. Refer to the PLD Templates User Manual (completed 1/19/2012) at Chapter 2 at the section “Reviewing Data Import Errors” beginning on page 19 for step-by-step instructions.

Importing New Data Extracts

Repeat Step 3 until all CSV files are imported:

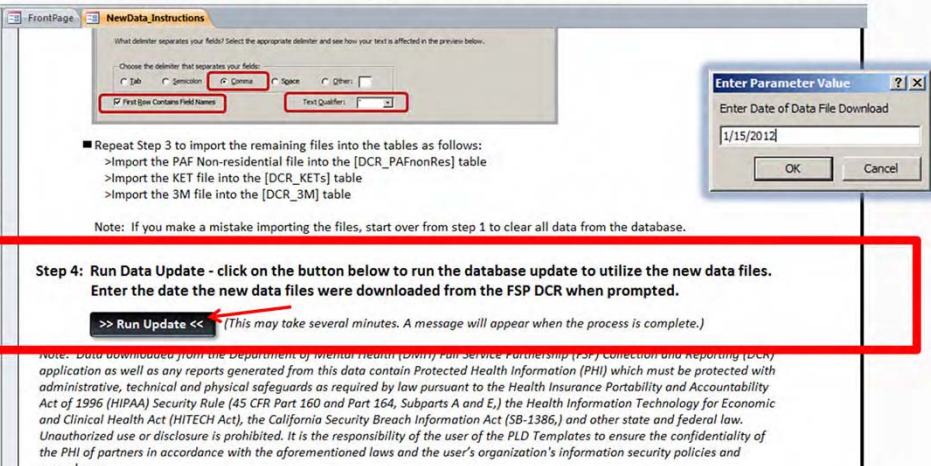
- Import PAF Residential File into [DCR_PAFRes] table
- Import PAF Non-residential file into [DCR_PAFnonRes] table
- Import KET file into [DCR_KETs] table
- Import 3M file into [DCR_3M] table

Step 3 will be repeated until all four CSV files have been uploaded into the appropriate tables in the PLD Templates:

- Import the PAF Residential File into the [DCR_PAFRes] table
- Import the PAF Non-residential file into the [DCR_PAFnonRes] table
- Import the KET file into the [DCR_KETs] table
- Import the 3M file into the [DCR_3M] table

Importing New Data Extracts

- Very Important! Don't forget to click button to **Run Update**.



What delimiter separates your fields? Select the appropriate delimiter and see how your text is affected in the preview below.

Choose the delimiter that separates your fields:

☐ Tab ☐ Generation ☒ Comma ☐ Space ☐ Other:

☒ First Line Contains Field Names

■ Repeat Step 3 to import the remaining files into the tables as follows:

- >Import the PAF Non-residential file into the [DCR_PAFnonRes] table
- >Import the KET file into the [DCR_KETs] table
- >Import the 3M file into the [DCR_3M] table

Note: If you make a mistake Importing the files, start over from step 1 to clear all data from the database.

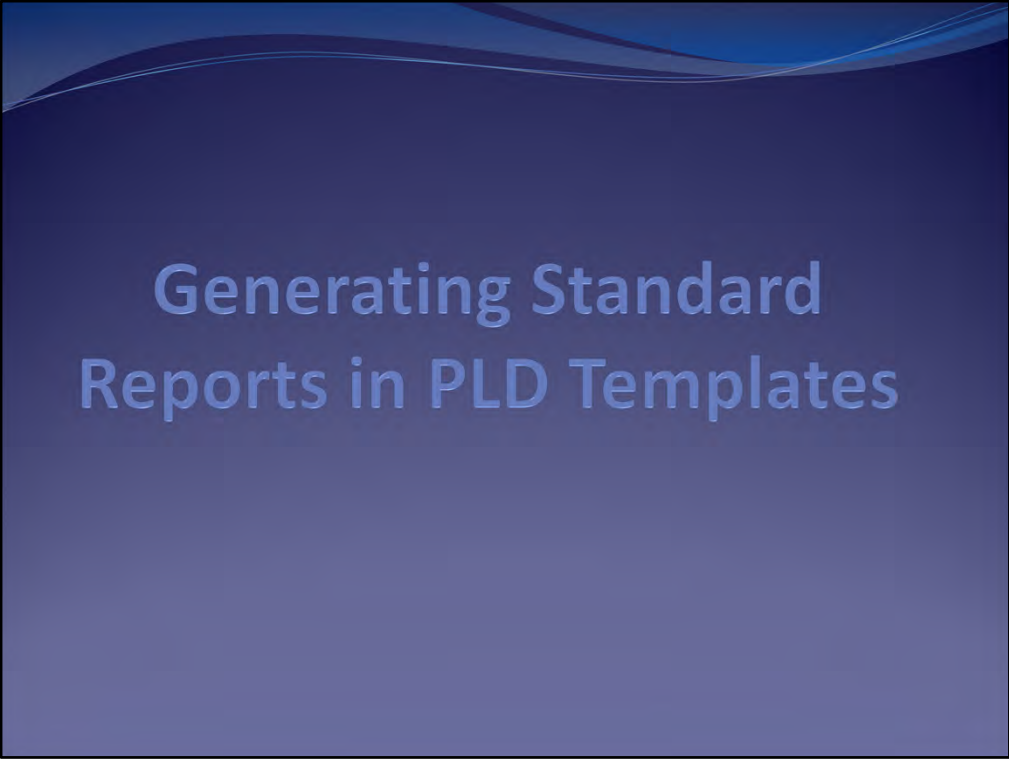
Step 4: Run Data Update - click on the button below to run the database update to utilize the new data files.
Enter the date the new data files were downloaded from the FSP DCR when prompted.

>> Run Update << (This may take several minutes. A message will appear when the process is complete.)

Note: Data downloaded from the Department of Mental Health (DMH) Full Service Partnership (FSP) Connection and Reporting (CCR) application as well as any reports generated from this data contain Protected Health Information (PHI) which must be protected with administrative, technical and physical safeguards as required by law pursuant to the Health Insurance Portability and Accountability Act of 1996 (HIPAA) Security Rule (45 CFR Part 160 and Part 164, Subparts A and E,) the Health Information Technology for Economic and Clinical Health Act (HITECH Act), the California Security Breach Information Act (SB-1386,) and other state and federal law. Unauthorized use or disclosure is prohibited. It is the responsibility of the user of the PLD Templates to ensure the confidentiality of the PHI of partners in accordance with the aforementioned laws and the user's organization's information security policies and procedures.

Perform Step 4 by selecting the [**>> Run Update <<**] button. This will run a macro which will make the data available to the templates. When prompted, enter the date the data was downloaded from the DCR or the date to which the data represents current information for the partner and select **OK**.

Note: The new data will not be available for viewing through the PLD Templates until the [**>> Run Update <<**] macro is run. The macro generates the necessary temporary tables based on a series of Microsoft Access queries.



Generating Standard Reports in PLD Templates

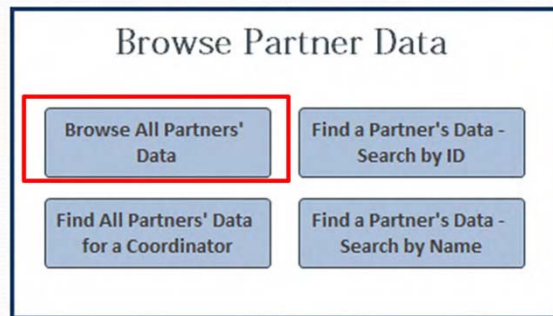
This Section Covers:

- **Using the Browse Partner Data Template**
 - Browse All Partners' Data
 - Find All Partners' Data by Coordinator ID
 - Find a Partner's Data – Search by ID
 - Find a Partner's Data – Search by Name
- **Using the Run Partner Report Template**
 - View Partner Report – Search by ID
 - Export PDF Report – Search by ID

This section covers the utility and features of the Browse Partner Data and the Run Partner Report Templates.

Browse Partner Data Template

- Select a button and enter criteria to find partners



The BPD template includes several options to browse partners' data, which can be accessed through the four buttons in the "Browse Partner Data" section of the front page as seen in this slide. You can browse through all partners' partnership data or search by partner ID, partner name or coordinator ID.

Selecting any of the four buttons and entering appropriate criteria when required will display the BPD template. The Browse All Partners' Data requires no criteria and will display every partner.

Browse Partner Data Template

FrontPage Partner Info
Browse Partner Data Template

Data Displayed Through: 1/15/2012

PARTNER INFORMATION

Partner Name: Jane, Jane 079 County Partner ID: 000000157 Global ID: b8258ea5-5e9c-4a66-a8d2-d393c1883676 CSI Number: 000000157 Gender: F Starting Age Group: Adult Ending Age Group: Adult DCR Date of Birth: 7/24/1963 CSI Date of Birth: 7/24/1963 CSI New Race: CSI Old Race: Hispanic: N	Partnership Date: 9/20/2011 Partnership Status: Active Date Status Change: 9/20/2011 Program: Adult FSP Days in Partnership: 117 Coordinator ID: Sam, Sam Provider Site ID: 1234 PAF Status: Complete Referred By: Homeless Shelter
---	--

DOMAIN DATA FOR: Jane, Jane 079

Total 3Ms Due: 1

3Ms Admin. Changes D1: Residential D2: Education D3: Employment D4: Financial D5: Legal D6: Emergency D7-D8: Health Substance D9: ADL D10: IADL

Record: 1 of 157 No Filter Search

After opening the BPD template, notice that in Microsoft Access 2010, by default, the template opens as another tab in the application. At the top of the BPD template, the **“Data Displayed Through:”** date signifies the last time the data in the PLD templates was updated from FSP DCR data file downloads. This is the date which was entered when selecting the **Run Update** button from the import page. It is also the date to which the number of active days in partnership is calculated for partnerships which are still active. Under the subheading of **“Partner Information”**, the first partnership’s partner information will be displayed.

In this slide, the example partnership was still active and had existed for 117 days at the time of data download on 1/15/2012.

There may be many partnerships available to browse. The total amount of partnerships and the current order of the partnership being viewed are displayed at the bottom left-hand corner of the report in the **Record** navigation box. As seen in this slide, the first of 157 total partnerships is displayed in this example.

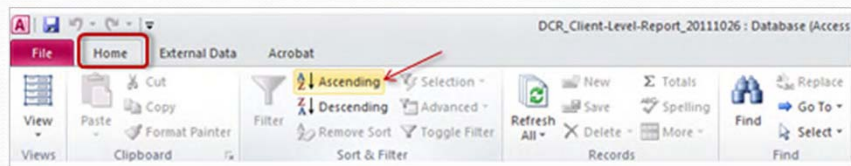
You can navigate to the next or previous partnership by clicking on the arrows to the left and right of the **Record** navigation box. Additionally, you can locate a partnership in a specific order by clicking on the **Record** navigation box and manually typing in a number within the range of the available partnership count and pressing **Enter**. The form will jump to the partnership associated with that order number. This may be useful when the partnerships are sorted in the form by a specific order. By default, the partnerships are

sorted by partnership status and partnership date, such that the active partnerships with the most recent partnership dates appear first. However, the partnerships can be sorted by other fields in the template.

Refer to the PLD Templates User Manual (completed 1/19/2012) at Chapter 3 “The Browse Partner Data (BPD) Template” beginning on page 22 for step-by-step instructions of scrolling through partners in the BPD Template.

Browse Partner Data Template

- Sorting Partners

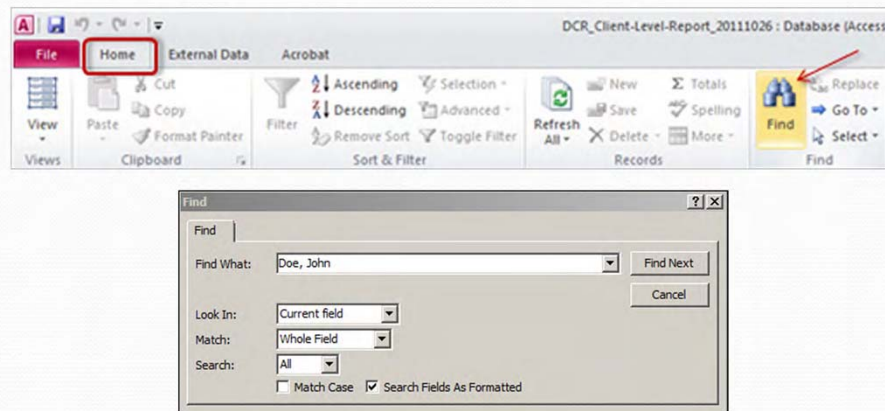


As mentioned, the partnerships are sorted by partnership status and partnership date by default, such that the active partnerships with the most recent partnership dates appear first. However, the partnerships can be sorted by other fields in the template.

To sort the order of the partnerships in a different order, place your cursor in the field in the “Partner Information” section of the BPD template which you would like to use to sort the partnerships (e.g., Age Group). As seen in this slide, select the **Home** menu and select either the **Ascending** or **Descending** button to sort the partnerships by the selected field.

Browse Partner Data Template

- Finding Partners – Select a field to search in the partner information section



To find a particular partner, place your cursor in the field in the **“Partner Information”** section of the BPD template which you would like to use to find a partnership (e.g., Partner Name).

As seen in this slide, select the **Home** menu and then select the **Find** button.

As seen in this slide, enter the criteria for the search. In this example, we are searching the partner name field to find a specific partner by name.

The **Find** box will remain open, and you can select the **Find Next** button to jump to the next partnership with matching search criteria.

Note: Selecting to search information under the **“Domain Data For”** sections in the lower half of the BPD template will only search for data within the partnership which is currently being displayed. The search will not bring up other partnership’s matching data.

Browse Partner Data Template

- Data for the partnership is displayed in the tabs
- 3Ms, Administrative Changes and all Domain Data
- This image displays the 3M Data

DOMAIN DATA FOR: Jane, Jane 009										Total 3Ms Due:	5
3Ms	Admin. Changes	D1: Residential	D2: Education	D3: Employment	D4: Financial	D5: Legal	D6: Emergency	D7-D8: Health Substance	D9: ADL	D10: IADL	
Total 3Ms Due: 5											
Assessment Date	Days in Partnership	For Quarter	Age Group at Time of Assessment								
4/14/2010	77	1	Child								
8/4/2010	189	2	Child								
10/27/2010	273	3	Child								
1/27/2011	365	4	Child								
4/19/2011	447	5	Child								

Under the “**Domain Data For**” subheading, there are tabs for the partnership’s information such as their legal, financial and employment data. All domain options are displayed in this slide. Data associated with a tab will be displayed by clicking on the tab. A vertical scroll bar will appear if necessary to allow scrolling within the table embedded in the tab.

In this example, the partner had five 3Ms due, and all five 3Ms were completed.

Browse Partner Data Template

○ Admin. Changes Tab Example

3Ms	Admin. Changes	D1: Residential	D2: Education	D3: Employment	D4: Financial	D5: Legal	D6: Emergency	D7-D8: Health Substance	D9: ADL	D10: IADL					
HISTORY OF CHANGES TO ADMINISTRATIVE DATA:															
Assessment Date	Date Change of Provider	Provider	Date Change of Program	Program	Date Change of Coord.	Coordinator	Date Change of Status	Status	Discontinue Reason	Date Change of AB2034	AB2034 Status	Date Change of GHI	GHI Status	Date Change of MHSA	MHSA Status
2/20/2008	2/20/2008	1234	2/20/2008	Wraparound	2/20/2008	Joe, Joe	2/20/2008	Active		2/20/2008	Not Enrolled	2/20/2008	Not Enrolled	2/20/2008	Not Enrolled
6/30/2008					6/30/2008	Bob, Bob									
12/9/2008					12/9/2008	Herald, Herald									
8/18/2010					8/18/2010	Discontinued	Met Goals								

The **Admin. Changes** tab displays a list of all administrative changes reported for the partnership, including assessment date and dates of change.

In this example, the partnership began on 2/20/2008 and changed coordinators from Joe to Bob to Herald. The partnership was discontinued on 8/18/2010 for having met goals.

Browse Partner Data Template

○ D1: Residential tab example

3Ms

Admin. Changes

D1: Residential

D2: Education

D3: Employment

D4: Financial

D5: Legal

D6: Emergency

D7-D8: Health Substance

D9: ADL

D10: IADL

DAYS AT RESIDENTIAL SETTINGS IN 12 MONTHS BEFORE FSP:

Residential Setting Yesterday	Total Days Reported Past 12	With Parents	With Other Family	Apt. Alone	Single Room Occ.	Foster Relative	Foster Non-Relative	Em. Shelter	Homeless	Indiv. Homeless	Assisted Living	Cong. Placmt.	Comm. Care	Medical Hosp.	Psych. Hosp.	State Psych.	Go. Home	Go. Home	Comm. Tr.	Res. Tr.	Nursing Home	Nursing Home	Long-Term Care	Juv. Hall / Camp	DUI	Jail	Prison	Other Setting	Unk. Setting
Homeless	365				27				218	120							0-11	12-14											

DAYS AT RESIDENTIAL SETTINGS DURING FSP:

Date Residential Change	Days in FSP	Residential Setting	Length at Setting	Assessment Date	Record Created Date
11/20/2008	0	Homeless	11	11/20/2008	12/03/08 9:57:06 AM
12/1/2008	11	Residential Treatment	91	12/5/2008	02/09/09 1:54:54 PM
3/2/2009	102	Emergency Shelter	36	3/11/2009	03/12/09 2:52:05 PM
4/7/2009	138	Apartment Alone	482	6/19/2009	06/19/09 1:19:31 PM

The **D1: Residential** tab displays the past 12 months of residential information and a list of all residential status changes during the program.

In this example, the partner spent 218 days and 120 days in emergency shelter and homeless, respectively, in the 12 months before the partnership. During the partnership, the partner spent 11 days homeless, 91 days in residential treatment, 36 days in an emergency shelter, and spent the final 482 days in an apartment alone.

Browse Partner Data Template

○ D2: Education example

3Ms	Admin. Changes	D1: Residential	D2: Education	D3: Employment	D4: Financial	D5: Legal	D6: Emergency	D7-D8: Health Substance	D9: ADL	D10: IADL									
EDUCATION IN 12 MONTHS BEFORE FSP:																			
Assessment Date	Age	Time Period	Ed. for Emo. Dist.	Ed. for Anoth. Reas.	Attendance	Grades	# Suspensions	# Expulsions	Weeks Not In School	Weeks in High School	Weeks in Tech. School	Weeks in Comm. College	Weeks in Grad. School	Weeks in Other School	Completed Pgm.	Ed. Recov. Goals			
7/29/2008	Child	Past 12	N/A	N/A	Good	Average	0	0											
CURRENT EDUCATION STATUS:																			
Assessment Date	Date of Change	Age	Time Period	Days In FSP	Highest Grade	Ed. for Emo. Dist.	Ed. for Anoth. Reas.	Attendance	Grades	Suspension	Expulsion	Not In School	In High School	In Tech. School	In Comm. College	In Grad. School	In Other School	Completed Pgm.	Ed. Recov. Goals
7/29/2008	7/29/2008	Child	Start of FSP - PAF	0	8th grade	No	No	Very Good	Good										
10/14/2008	10/8/2008	Child	During FSP	71						Yes									
10/17/2008	10/17/2008	Child	During FSP - 3Ms	80		Yes	No	Good	Below Average										
5/4/2009	5/4/2009	Child	During FSP - 3Ms	279		No	Yes	Good	Good										

The **D2: Education** tab displays the past 12 months of education information and a list of all education KET and 3M assessments during the program.

In this example, the partner entered the FSP in 8th grade with very good grades. The partner had average grades during the previous year. The partner was suspended after 71 days in the partnership as reported on a KET, and the partner's grades were below average at the first 3M assessment at day 80 of the partnership. The next 3M assessment submitted was at 279 days into the partnership, and the partner's grades were good.

Browse Partner Data Template

○ D3: Employment

3Ms	Admin. Changes	D1: Residential	D2: Education	D3: Employment	D4: Financial	D5: Legal	D6: Emergency	D7-D8: Health Substance	D9: ADL	D10: IADL
-----	----------------	-----------------	---------------	----------------	---------------	-----------	---------------	-------------------------	---------	-----------

EMPLOYMENT IN 12 MONTHS BEFORE FSP:																				
Assessment Date	Age	Time Period	Competitive Employment			Supported Employment			Transitional Employment			In-House Employment			Non-Paid		Other Employment			Un-employed
			Wks	Hrs/Wk	Wage/Hr	Wks	Hrs/Wk	Wage/Hr	Wks	Hrs/Wk	Wage/Hr	Wks	Hrs/Wk	Wage/Hr	Wks	Hrs/Wk	Wks	Hrs/Wk	Wage/Hr	
8/24/2007	TAY	Past 12	0			0			0			0			7	18	0			45

EMPLOYMENT DURING FSP:																						
Assessment Date	Change Date	Age	Time Period	Days In FSP	Competitive Employment			Supported Employment			Transitional Employment			In-House Employment			Non-Paid		Other Employment			Un-employed
					Wks	Hrs/Wk	Wage/Hr	Wks	Hrs/Wk	Wage/Hr	Wks	Hrs/Wk	Wage/Hr	Wks	Hrs/Wk	Wage/Hr	Wks	Hrs/Wk	Wks	Hrs/Wk	Wage/Hr	
8/24/2007	8/24/2007	TAY	Start of FSP - PAF	0																		
9/21/2007	9/19/2007	TAY	During FSP - KET	26	25	\$7.00																

The **D3: Employment** tab displays the past 12 months of employment information and a list of all employment KET assessments during the program.

In this example, the partner was unemployed for 45 of 52 weeks in the past 12 months and spent 7 weeks in non-paid employment for 18 hours per week. On day 26 in the FSP, a KET assessment reported that the partner began work at 25 hours a week for \$7.00 per hour.

Browse Partner Data Template

○ D4: Financial

3Ms	Admin. Changes	D1: Residential	D2: Education	D3: Employment	D4: Financial	D5: Legal	D6: Emergency	D7-D8: Health Substance	D9: ADL	D10: IADL												
FINANCIAL SUPPORT IN 12 MONTHS BEFORE FSP:																						
Assessment Date	Age	Time Period	Any Caregiver	Any Wages	Any Spouse	Any Savings	Any Child Support	Any Other Family	Any Retirement	Any Veteran	Any Loan	Any Housing	Any General	Any Food Stamps	Any TANF	Any SSI	Any SSDI	Any SDI	Any Tribal	Any Other Support	No Support	
3/18/2008 Adult		Past 12			Yes			Yes					Yes	Yes								
FINANCIAL SUPPORT DURING FSP:																						
Assessment Date	Age	Time Period	Days In FSP	Any Caregiver	Any Wages	Any Spouse	Any Savings	Any Child Support	Any Other Family	Any Retirement	Any Veteran	Any Loan	Any Housing	Any General	Any Food Stamps	Any TANF	Any SSI	Any SSDI	Any SDI	Any Tribal	Any Other Support	No Support
3/18/2008 Adult		Start of FSP - PAF	0			Yes									Yes							
6/18/2008 Adult		During FSP - 3M	92		Yes												Yes					

The **D4: Financial** tab displays the past 12 months of financial support information and a list of all financial support 3M assessments during the program.

In this example, the partner had financial support in the form of spouse, general and food stamps in the 12 months before the FSP. At the start of the FSP, the partner was receiving financial support from spouse and food stamps. At the second 3M assessment, the partner reported financial support from wages and SSI.

Browse Partner Data Template

○ D5: Legal

3Ms	Admin. Changes	D1: Residential	D2: Education	D3: Employment	D4: Financial	D5: Legal	D6: Emergency	D7-D8: Health Substance	D9: ADL	D10: IADL	
-----	----------------	-----------------	---------------	----------------	---------------	-----------	---------------	-------------------------	---------	-----------	--

Assessment Date	Age	Time Period	Arrested	Probation Status	Parole Status	Conservatorship Status	Payee Status	WI Code Status	WI Code Year
6/7/2007	Child	Past 12	1	Yes	No	No	No	No	2006

Assessment Date	Age	Time Period	Days In FSP	Date Change	Arrested	Probation Status	Parole Status	Conservatorship Status	Payee Status	WI Code Status	WI Code Year	No. Dependents on WI Code	No. Dependents in Foster Care	No. Dependents Reunified	No. Dependents Adopted
6/7/2007	Child	Start of FSP - PAF	0			Yes	No	No	No	No	2006	0	0	0	0
9/7/2007	Child	During FSP - 3M	92									0	0	0	0
12/7/2007	Child	During FSP - 3M	183									0	0	0	0
2/26/2008	TAY	During FSP - KET	197	12/21/2007		Off									

The **D5: Legal** tab displays the past 12 months of legal issues and a list of all KET and 3M assessment legal issues during the program.

In this example, the partner was arrested one time in the 12 months before partnership and was on probation upon entering the FSP. No changes were reported on the first two 3M assessments. On day 197 in the FSP, a KET assessment reported that the partner went off probation.

Browse Partner Data Template

○ D6: Emergency

3Ms	Admin. Changes	D1: Residential	D2: Education	D3: Employment	D4: Financial	D5: Legal	D6: Emergency	D7-D8: Health Substance	D9: ADL	D10: IADL
-----	----------------	-----------------	---------------	----------------	---------------	-----------	---------------	-------------------------	---------	-----------

EMERGENCY INTERVENTIONS IN 12 MONTHS BEFORE FSP:				
Assessment Date	Age Group	Time Period	No. of Physical Related Emergencies	No. of Mental Related Emergencies
8/21/2008	Adult	Past 12		1

EMERGENCY INTERVENTIONS DURING FSP:					
Assessment Date	Age Group	Time Period	Days in FSP	Date of Emergency	Emergency Type
1/16/2009	Adult	During FSP - KET	144	1/12/2009	Mental / Substance
2/9/2009	Adult	During FSP - KET	166	2/3/2009	Physical Health
2/9/2009	Adult	During FSP - KET	170	2/7/2009	Physical Health

The **D6: Emergency** tab displays the past 12 months of emergency interventions and a list of all emergency intervention KET assessments during the program.

In this example, the partner reported one mental/substance related emergency in the 12 months before the partnership. During the partnership, the partner had a mental/substance related emergency at 144 days in the partnership, and the partner had physical health emergencies on days 166 and 170 in the partnership.

Browse Partner Data Template

○ D7 & D8: Health and Substance

3Ms	Admin. Changes	D1: Residential	D2: Education	D3: Employment	D4: Financial	D5: Legal	D6: Emergency	D7-D8: Health Substance	D9: ADL	D10: IADL
HEALTH AND SUBSTANCE ABUSE IN 12 MONTHS BEFORE FSP:										
Assessment Date	Age Group	Time Period	Had Physician	Ever had Substance Abuse Problem						
12/17/2008	TAY	Past 12	No	Yes						
HEALTH AND SUBSTANCE ABUSE DURING FSP:										
Assessment Date	Age Group	Time Period	Days in FSP	Has Physician	Active Substance Abuse Problem	Receiving Substance Abuse Services				
12/17/2008	TAY	Start of FSP	0	No	Yes	No				
3/10/2009	TAY	During FSP - 3M	83	Yes	Yes	No				
6/4/2009	TAY	During FSP - 3M	169	Yes	Yes	Yes				
10/6/2009	TAY	During FSP - 3M	293	Yes	Yes	Yes				
12/14/2009	TAY	During FSP - 3M	362	Yes	Yes	Yes				

The **D7-D8: Health Substance** tab displays the past 12 months of health and substance abuse history and a list of all health and substance abuse 3M assessments during the program.

In this example, the partner did not have a physician and had a substance abuse problem in the 12 months before and at the start of the FSP. The partner was not receiving substance abuse services at the start of the FSP. At the first 3M assessment on day 83, the partner reported having a physician. At the second 3M assessment on day 169, the partner reported receiving substance abuse services.

Browse Partner Data Template

○ D9: Activities of Daily Living (ADL)

3Ms	Admin. Changes	D1: Residential	D2: Education	D3: Employment	D4: Financial	D5: Legal	D6: Emergency	D7-D8: Health Substance	D9: ADL	D10: IADL	
ACTIVITIES OF DAILY LIVING (ADL) DURING FSP:											
Assessment Date	Age Group	Time Period	Days in FSP	Bathing	Dressing	Toileting	Transfer	Continence	Feeding	Walking	House Confinement
11/9/2009	Older Adult	During FSP - 3M	270	1- Receives no assistance	1- Gets clothes and gets completely dressed without assistance	1- Goes to toilet room, cleans self, and arranges clothes without assistance	1- Doesn't go to room termed "toilet" for the elimination process	1- Controls urination and bowel movement completely by self	1- Feeds self without assistance	1- Walks on level without assistance	1- Has been outside of residence on 3 or more days during the past 2 weeks
2/2/2010	Older Adult	During FSP - 3M	355	1- Receives no assistance	1- Gets clothes and gets completely dressed without assistance	1- Goes to toilet room, cleans self, and arranges clothes without assistance	1- Doesn't go to room termed "toilet" for the elimination process	1- Controls urination and bowel movement completely by self	1- Feeds self without assistance	1- Walks on level without assistance	1- Has been outside of residence on 3 or more days during the past 2 weeks
5/3/2010	Older Adult	During FSP - 3M	445	1- Receives no assistance	1- Gets clothes and gets completely dressed without assistance	1- Goes to toilet room, cleans self, and arranges clothes without assistance	1- Doesn't go to room termed "toilet" for the elimination process	1- Controls urination and bowel movement completely by self	1- Feeds self without assistance	1- Walks on level without assistance	1- Has been outside of residence on 3 or more days during the past 2 weeks

The **D9: ADL** tab displays the ADL 3M assessments for older adults during the program.

In this example, the partner had three 3M assessments during the program, and the ADL status were captured on days 270, 355 and 445 in the program.

Browse Partner Data Template

○ D10: Instrumental Activities of Daily Living (IADL)

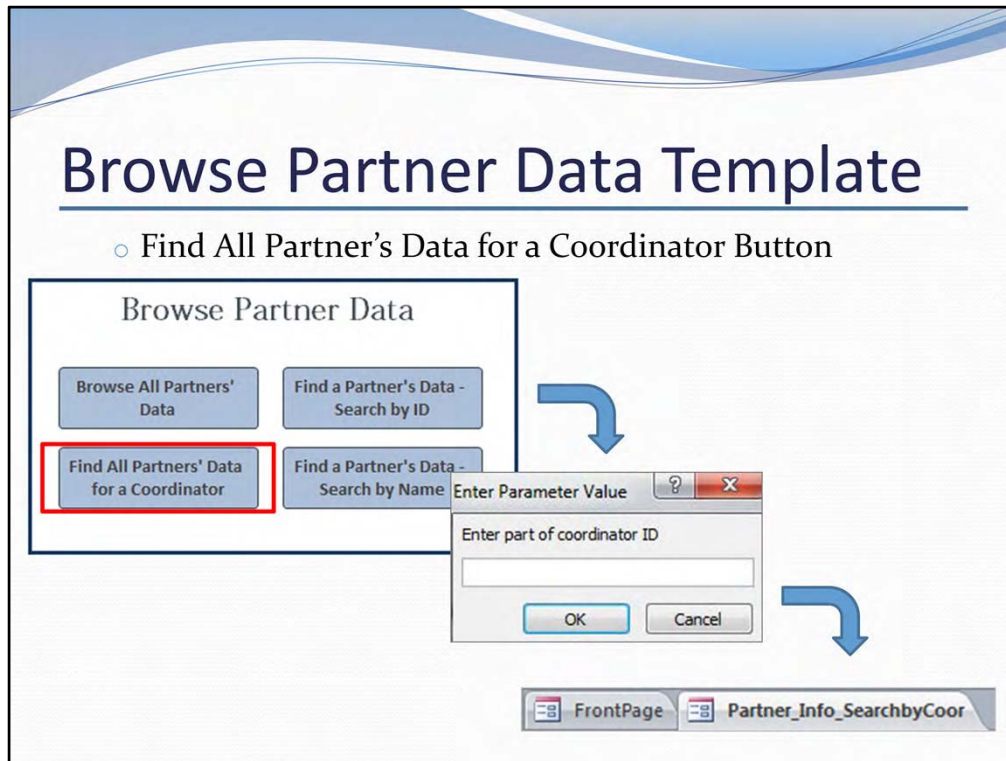
3Ms	Admin. Changes	D1: Residential	D2: Education	D3: Employment	D4: Financial	D5: Legal	D6: Emergency	D7-D8: Health Substance	D9: ADL	D10: IADL	
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INSTRUMENTAL ACTIVITIES OF DAILY LIVING (IADL) DURING FSP:

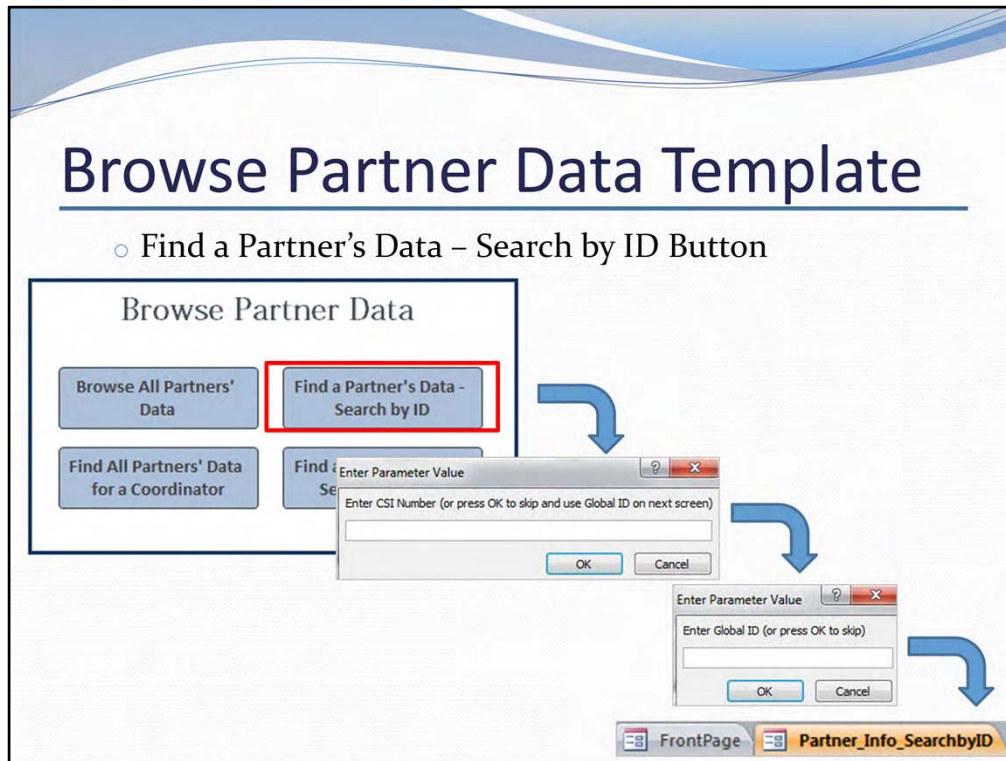
Assessment Date	Age Group	Time Period	Days in FSP	Telephone	Walking Distance	Groceries	Meals	Housework	Handyman	Laundry	Medication	Money
11/9/2009	Older Adult	During FSP - 3M	270	1-Without Help	1-Without Help	1-Without Help	1-Without Help	1-Without Help	2-With Some Help	1-Without Help	1-Without Help	1-Without Help
2/2/2010	Older Adult	During FSP - 3M	355	1-Without Help	1-Without Help	1-Without Help	1-Without Help	1-Without Help	2-With Some Help	1-Without Help	1-Without Help	1-Without Help
5/3/2010	Older Adult	During FSP - 3M	445									

The **D10: IADL** tab displays the IADL 3M assessments for older adults during the program.

In this example, the partner had three 3M assessments during the program, and the IADL status was captured on days 270 and 355. The IADL information was not completed for the 3M assessment on day 445 in the program.



The **Find All Partner's Data for a Coordinator** will apply a filter to the BPD template based on matching the criteria entered with a coordinator ID. As seen in this slide, selecting this button will bring up the "Enter Parameter Value" pop-up window. Typing in any portion of a coordinator ID in the box will apply the filter to the BPD template. The BPD template will then display only those partnerships with associated coordinator IDs containing the entered text as any consecutive part of the coordinator ID. For example, entering "Smith" in the "Enter Parameter Value" pop-up window will display partnerships for all coordinator IDs with any portion of "Smith" as part of the ID. As seen in this slide, the BPD template will open in a new tab titled "**Partner_Info_SearchbyCoor**" with partnership records that are exclusive to the coordinator ID search performed. The number of partnerships available can be seen in the **Record** box in the lower left-hand corner of the screen.

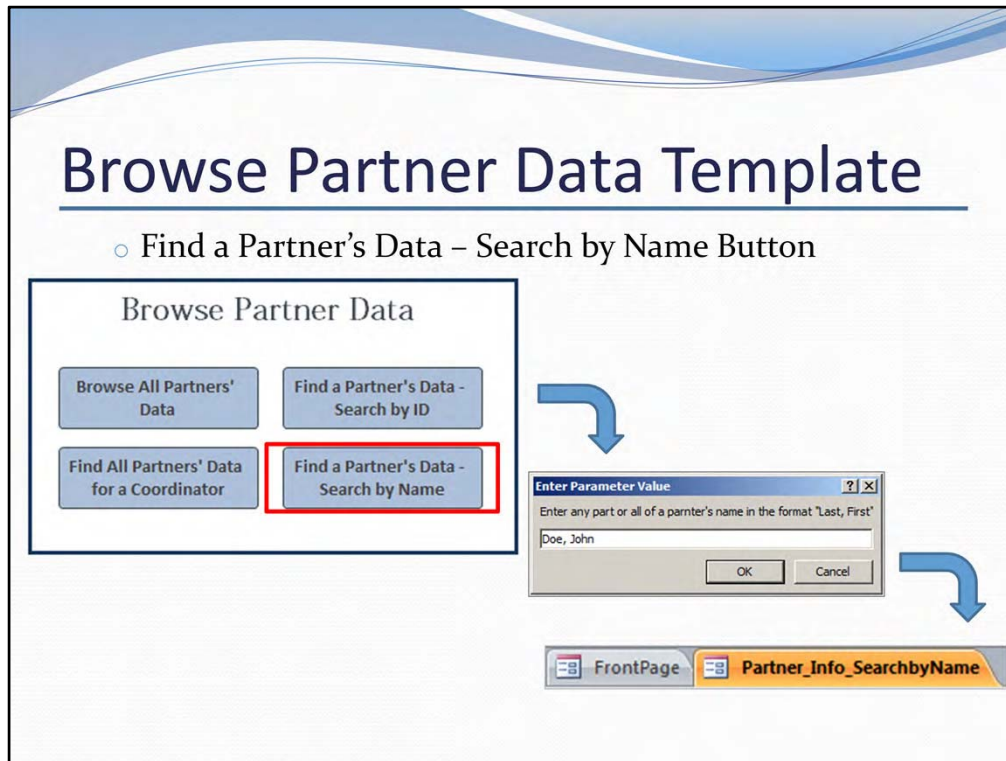


The **Find a Partner's Data – Search by ID** button will apply a filter to the BPD template based on matching the criteria entered with a partner ID. There are two options for entering partner IDs. You can enter a CSI number in the first pop-up window or enter a Global ID in the second window.

To search for a specific partnership by partner ID number, click on the **Find a Partner's Data – Search ID** button under the “Browse Partner Data” heading. As seen in this slide, the first pop-up window that appears will allow you to enter search criteria of CSI number. If known, enter the CSI number and press **OK**. If you would prefer to search by Global ID, enter nothing in this first window and click **OK** to skip the search by CSI number.

As seen in this slide, the second pop-up window that appears will allow you to enter search criteria of Global ID. If a CSI Number was already entered in the previous pop-up window, then click **OK** to skip the search by Global ID. If the CSI Number was not entered, then enter a Global ID for a partnership and press **OK** to continue.

As seen in this slide, the BPD template will open in a new tab titled **“Partner_Info_SearchbyID”** with the partnership information for the partnership matching the partner ID entered into the search box. The number of partnerships for partners with matching IDs is displayed in the **Record** box in the lower left-hand corner of the screen.



The **Find a Partner's Data – Search by Name** will apply a filter to the BPD template based on matching the criteria entered with a partner's name.

As seen in this slide, selecting this button will bring up the "Enter Parameter Value" pop-up window. Typing in any portion of a partner's name in the box will apply the filter to the BPD template. The BPD template will then display only those partnerships which contain the entered text as any consecutive part of the partner name. For example, entering "Martin" in the "Enter Parameter Value" pop-up window will display partnership data for all partnerships with any portion of "Martin" as either their first or last name. The standard FSP DCR format for the name field is "Last, First". Therefore, you can conduct a search for a partnership using the full name with that format. As seen in this slide, for example John Doe would be found using "Doe, John".

As seen in this slide, the BPD template will open in a new tab titled **"Partner_Info_SearchbyName"** with partnerships matching the search criteria displayed. The number of partnerships matching the search can be seen in the **Record** box in the lower left-hand corner of the screen.

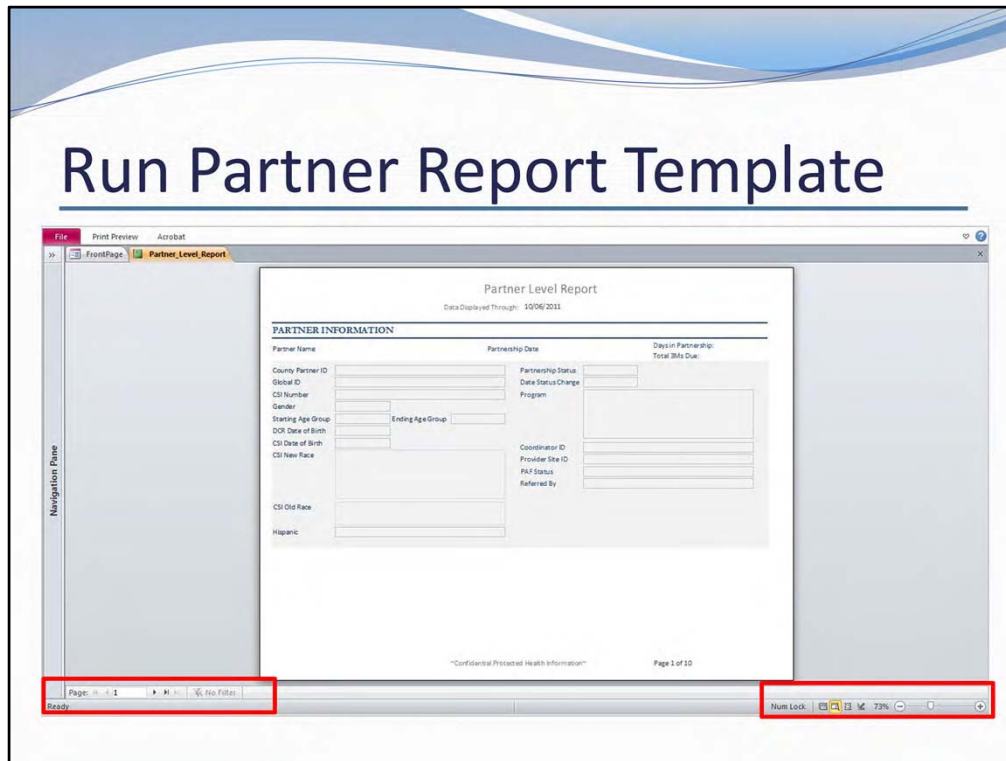


The RPR template includes two options to generate a partnership report, which can be accessed through the two buttons in the **“Run Partner Report”** section of the front page as seen in this slide. The RPR Template can be viewed in Microsoft Access as an Access report or it can be exported as a PDF file.

The **View Partner Report – Search by ID** button will display a report within Microsoft Access, which can be viewed electronically or printed from Microsoft Access. A report for a partnership is displayed based on matching the criteria entered for a partner ID. There are two options for entering partner IDs. You can enter a CSI number in the first pop-up window or enter a Global ID in the second pop-up window.

To display a report for a specific partnership, click on the **View Partner Report – Search by ID** button under the **“Run Partner Report”** heading. As seen in this slide, the first pop-up window which appears will allow you to enter search criteria of CSI number. If known, enter the CSI number and press **OK**. If you would prefer to search by Global ID, click **OK** to skip the search by CSI number.

Note: You can use CTRL + V to paste search criteria into the **“Enter Parameter Value”** pop-up windows.



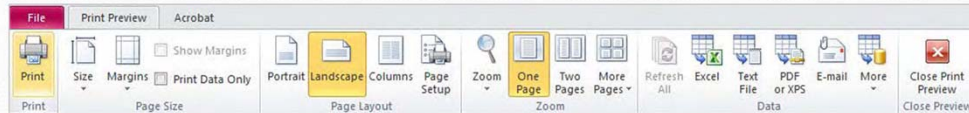
As seen in this slide, the report will open in print preview mode.

As seen in this slide, the **Page** selector in the lower left-hand corner will allow you to scroll or jump to any page in the report.

As seen in this slide, a zoom slide-bar in the lower right-hand corner allows you to quickly enlarge or shrink the view of the report on the screen.

Run Partner Report Template

- The **Print Preview** ribbon for the report



As seen in this slide, The **Print Preview** ribbon heading has print options. Clicking **Print** will print the partnership report. You can also zoom in or out and view the report by more than one page in the “Zoom” section of the ribbon. The **Close Print Preview** option will exit the partner level report and return you to the front page.

Note: The margins of the partner report are set for printing on standard printers. Adjusting the margins may affect the quality of the report. However, if the report prints extra blank pages on your printer, then slightly adjusting the margins may solve the issue.

Partner Level Report

Data Displayed Through: 1/15/2012

PARTNER INFORMATION

Partner Name: John, John 063		Partnership Date: 4/7/2009	Days in Partnership: 595 Total 3Ms Due: 6
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<table border="0"> <tr><td>County Partner ID</td><td>000000063</td></tr> <tr><td>Global ID</td><td>8f1a7b0a-c31d-4e06-9d01-4f8f8b7ac71c</td></tr> <tr><td>CSI Number</td><td>000000063</td></tr> <tr><td>Gender</td><td>M</td></tr> <tr><td>Starting Age Group</td><td>TAY</td><td>Ending Age Group</td><td>TAY</td></tr> <tr><td>DCR Date of Birth</td><td>5/7/1992</td><td></td><td></td></tr> <tr><td>CSI Date of Birth</td><td>5/7/1992</td><td></td><td></td></tr> <tr><td>CSI New Race</td><td colspan="3">American Native or Alaska Native</td></tr> <tr><td>CSI Old Race</td><td colspan="3">American Native</td></tr> <tr><td>Hispanic</td><td colspan="3">Y</td></tr> </table>	County Partner ID	000000063	Global ID	8f1a7b0a-c31d-4e06-9d01-4f8f8b7ac71c	CSI Number	000000063	Gender	M	Starting Age Group	TAY	Ending Age Group	TAY	DCR Date of Birth	5/7/1992			CSI Date of Birth	5/7/1992			CSI New Race	American Native or Alaska Native			CSI Old Race	American Native			Hispanic	Y			<table border="0"> <tr><td>Partnership Status</td><td>Inactive</td></tr> <tr><td>Date Status Change</td><td>11/23/2010</td></tr> <tr><td>Program</td><td>Wraparound</td></tr> <tr><td>Coordinator ID</td><td>Laura, Laura</td></tr> <tr><td>Provider Site ID</td><td>1234</td></tr> <tr><td>PAF Status</td><td>Pending</td></tr> <tr><td>Referred By</td><td>Social Services Agency</td></tr> </table>	Partnership Status	Inactive	Date Status Change	11/23/2010	Program	Wraparound	Coordinator ID	Laura, Laura	Provider Site ID	1234	PAF Status	Pending	Referred By	Social Services Agency
County Partner ID	000000063																																														
Global ID	8f1a7b0a-c31d-4e06-9d01-4f8f8b7ac71c																																														
CSI Number	000000063																																														
Gender	M																																														
Starting Age Group	TAY	Ending Age Group	TAY																																												
DCR Date of Birth	5/7/1992																																														
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CSI New Race	American Native or Alaska Native																																														
CSI Old Race	American Native																																														
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Coordinator ID	Laura, Laura																																														
Provider Site ID	1234																																														
PAF Status	Pending																																														
Referred By	Social Services Agency																																														

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The first page of a nine page example report is displayed in this slide. At the top of the RPR template, the **“Data Displayed Through:”** date signifies the last time the data in the PLD templates was updated from FSP DCR data file downloads. The bottom right-hand corner of the report will display the page number.

PARTNER INFORMATION															
Partner Name John, John 063				Partnership Date 4/7/2009				Days in Partnership:		595					
								Total 3Ms Due:		6					
3M Assessments															
Assessment Date	Days in Partnership			For Quarter	Age Group at Time of Assessment										
7/30/2009	114			1	TAY										
10/8/2009	184			2	TAY										
6/25/2010	444			5	TAY										
9/24/2010	535			6	TAY										
History of Administrative Changes															
Assessment Date	Date Change of Prov.	Provider	Date Change of Program	Program	Date Change of Coord.	Coordinator	Date Change of Status	Status	Discontinue Reason	Date Change of AB2034	AB2034 Status	Date Change of GHI	GHI Status	Date Change of BHSIA	BHSIA Status
4/7/2009	4/7/2009	1234	4/7/2009	Unpublished	4/7/2009	Leung, Leung	4/7/2009	Active		4/7/2009	Not Enrolled	4/7/2009	Not Enrolled	4/7/2009	Not Enrolled
4/9/2009					4/9/2009	Am, Am									
1/3/2011							11/23/2010	Discontinued	Not Enrolled						

~Confidential Protected Health Information~

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~Confidential Protected Health Information~

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This slide displays the 3M Assessments and Administrative Changes page of the report.

This slide displays the Residential Settings Domain page of the report.

PARTNER INFORMATION																			
Partner Name: John, John 063										Partnership Date: 4/7/2009				Days in Partnership: 595					
Total 3Ms Due: 6																			
Education Domain																			
12 Months Before FSP																			
Assessment Date	Date of Change	Age	Time Period	Ed. for Em.	Ed. for Anoth.	Attendance	Grades	# Suspensions	# Expulsions	Wks. in School	Wks. in High School	Wks. in Tech. School	Wks. in Comm. College	Wks. in Grad. School	Wks. in Other	Completed Pgm.	Ed. Resour. Goals		
4/7/2009	TAY	Past 12		N/A	N/A	Good	Below Average	4											
Education During FSP																			
Assessment Date	Date of Change	Age	Time Period	Days in FSP	Highest Grade	Ed. for Em.	Ed. for Anoth.	Attendance	Grades	Suspensions	Expulsions	Not in School	In High School	In Tech. School	In Comm. College	In Grad. School	In Other	Completed Pgm.	Ed. Resour. Goals
4/7/2009	4/7/2009	TAY	Start of FSP - PAF		0 8th grade	No	Yes	Very Good	Good										
7/30/2009	7/30/2009	TAY	During FSP - 3Ms	114		No	Yes	Good	Below Average										
10/8/2009	10/8/2009	TAY	During FSP - 3Ms	184		No	Yes	Good	Average										
6/25/2010	6/25/2010	TAY	During FSP - 3Ms	444		No	Yes	Good	Below Average										
8/24/2010	8/15/2010	TAY	During FSP - 4ET	495								Yes						No	
8/24/2010	8/24/2010	TAY	During FSP - 3Ms	335		No	No												

"Confidential Protected Health Information" Page 4 of 9

This slide displays the Education Domain page of the report.

PARTNER INFORMATION												
Partner Name: John, John 063					Partnership Date: 4/7/2009				Days in Partnership: 595			
									Total SMS Due: 6			
Employment Domain												
12 Months Before FSP												
Assessment Date	Change Date	Age	Time Period	Days In FSP	Competitive Emp. Wks. Hrs/Wk. Wages/Hr.	Supported Emp. Wks. Hrs/Wk. Wages/Hr.	Transitional Emp. Wks. Hrs/Wk. Wages/Hr.	In-House Employment Wks. Hrs/Wk. Wages/Hr.	Non-Paid Wks. Hrs/Wk.	Other Employment Wks. Hrs/Wk. Wages/Hr.	Unemployed	
4/7/2009			TAY	P81112								
Employment During FSP												
Assessment Date	Change Date	Age	Time Period	Days In FSP	Competitive Emp. Wks. Hrs/Wk. Wages/Hr.	Supported Emp. Wks. Hrs/Wk. Wages/Hr.	Transitional Emp. Wks. Hrs/Wk. Wages/Hr.	In-House Employment Wks. Hrs/Wk. Wages/Hr.	Non-Paid Wks. Hrs/Wk.	Other Employment Wks. Hrs/Wk. Wages/Hr.	Unemployed	
4/7/2009	4/7/2009	TAY	Start of FSP - PAF	0								Yes

"Confidential Protected Health Information" Page 5 of 9

This slide displays the Employment Domain page of the report.

PARTNER INFORMATION																				
Partner Name: John, John 063										Partnership Date: 4/7/2009					Days in Partnership: 595					
															Total 3Ms Due: 6					
Financial Domain																				
12 Months Before FSP																				
Assessment Date	Age	Time Period	Days in FSP	Any Care-giver	Any Wages	Any Spouse	Any Savings	Any Child Support	Any Other Family	Any Retirement	Any Veteran	Any Loan	Any Housing	Any General	Any Food Stamps	Any TANF	Any SSI	Any SSI	Any SSI	No Other Support
4/7/2009	TAY	Past 12		Yes																
Financial Support During FSP																				
Assessment Date	Age	Time Period	Days in FSP	Any Care-giver	Any Wages	Any Spouse	Any Savings	Any Child Support	Any Other Family	Any Retirement	Any Veteran	Any Loan	Any Housing	Any General	Any Food Stamps	Any TANF	Any SSI	Any SSI	Any SSI	No Other Support
4/7/2009	TAY	Start of FSP - PAF		0	Yes															
7/30/2009	TAY	During FSP - 3M		114																Yes
10/8/2009	TAY	During FSP - 3M		184	Yes															
6/23/2010	TAY	During FSP - 3M		444	Yes															
8/24/2010	TAY	During FSP - 3M		333	Yes															Yes

"Confidential Protected Health Information"

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This slide displays the Financial Domain page of the report.

PARTNER INFORMATION															
Partner Name: John, John 063				Partnership Date: 4/7/2009				Days in Partnership: 595 Total 3Ms Due: 6							
Legal Domain															
12 Months Before FSP															
Assess-ment Date	Age	Time Period	Arrested	Probation Status	Parole Status	Condoma-tionship Status	Payer Status	WIC Code Status	WIC Code Year						
4/7/2008	TAY	Past 12	2	Yes	No	No	No	No	No						
Legal Issues During FSP															
Assess-ment Date	Age	Time Period	Days in FSP	Date Change	Arrested	Probation Status	Parole Status	Condoma-tionship Status	Payer Status	WIC Code Status	WIC Code Year	No. Depen-dent on WIC Code	No. Depen-dent on Foster Care	No. Depen-dent on Reunited	No. Depen-dent on Adopted
4/7/2008	TAY	Start of FSP - PAF	0			Yes	No	No	No	No		0	0	0	0
4/28/2008	TAY	During FSP - KET	20	4/27/2009	Yes										
7/30/2009	TAY	During FSP - 3M	114									0	0	0	0
10/8/2009	TAY	During FSP - 3M	184									0	0	0	0
6/25/2010	TAY	During FSP - 3M	444									0	0	0	0
9/24/2010	TAY	During FSP - 3M	515									0	0	0	0

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This slide displays the Legal Domain page of the report.

PARTNER INFORMATION					
Partner Name	John, John 063	Partnership Date	4/7/2009	Days in Partnership: Total 3Ms Due:	595 6
Emergency Intervention Domain					
12 Months Before FSP					
Assessment Date	Age Group	Time Period	No. of Physical Related Emergencies	No. of Mental Related Emergencies	
4/7/2009	TAY	Past 12	0	0	

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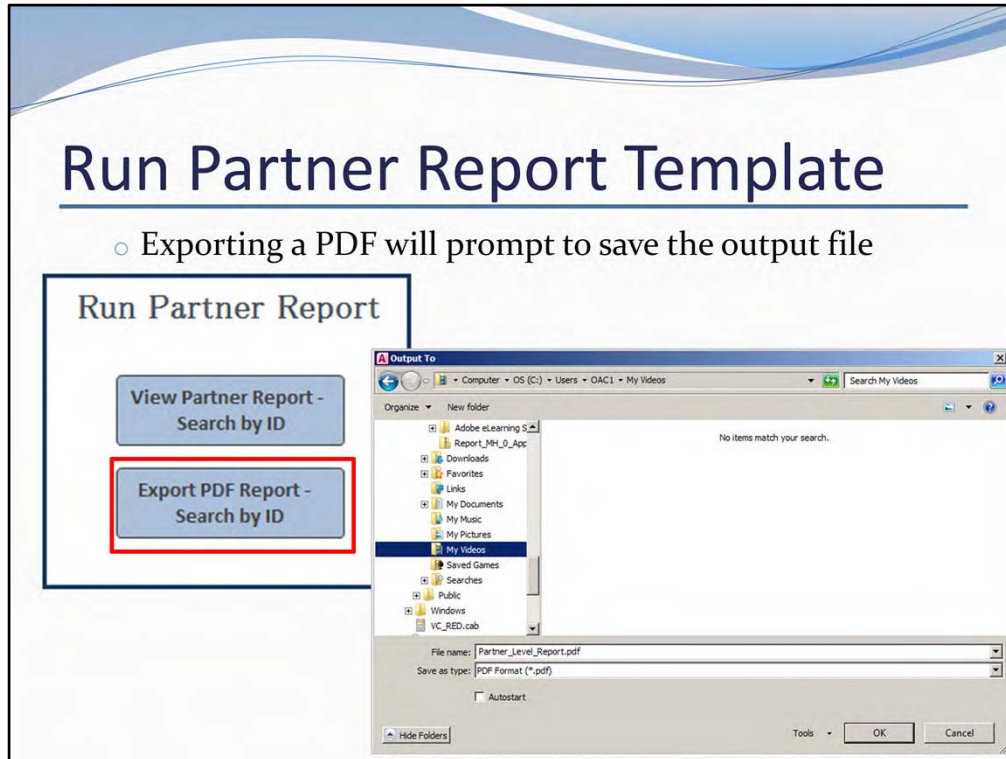
This slide displays the Emergency Intervention Domain page of the report.

PARTNER INFORMATION						
Partner Name	John, John 063		Partnership Date	4/7/2009		Days in Partnership: Total 3Ms Due:
						595 6
Health and Substance Abuse Domains						
12 Months Before FSP						
Assessment Date	Age Group	Time Period	Has Physician	Ever had Substance Abuse Problem		
4/7/2009	TAY	Past 12	Yes	Yes		
Health and Substance Abuse During FSP						
Assessment Date	Age Group	Time Period	Days in FSP	Has Physician	Active Substance Abuse Problem	Receiving Substance Abuse Services
4/7/2009	TAY	Start of FSP	0	Yes	Yes	No
7/30/2009	TAY	During FSP - 3M	114	Yes	Yes	Yes
10/8/2009	TAY	During FSP - 3M	184	No	Yes	No
6/25/2010	TAY	During FSP - 3M	444	No	Yes	No
9/24/2010	TAY	During FSP - 3M	535	No	No	No

~Confidential Protected Health Information~

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This slide displays the Health and Substance Abuse Domains page of the report.

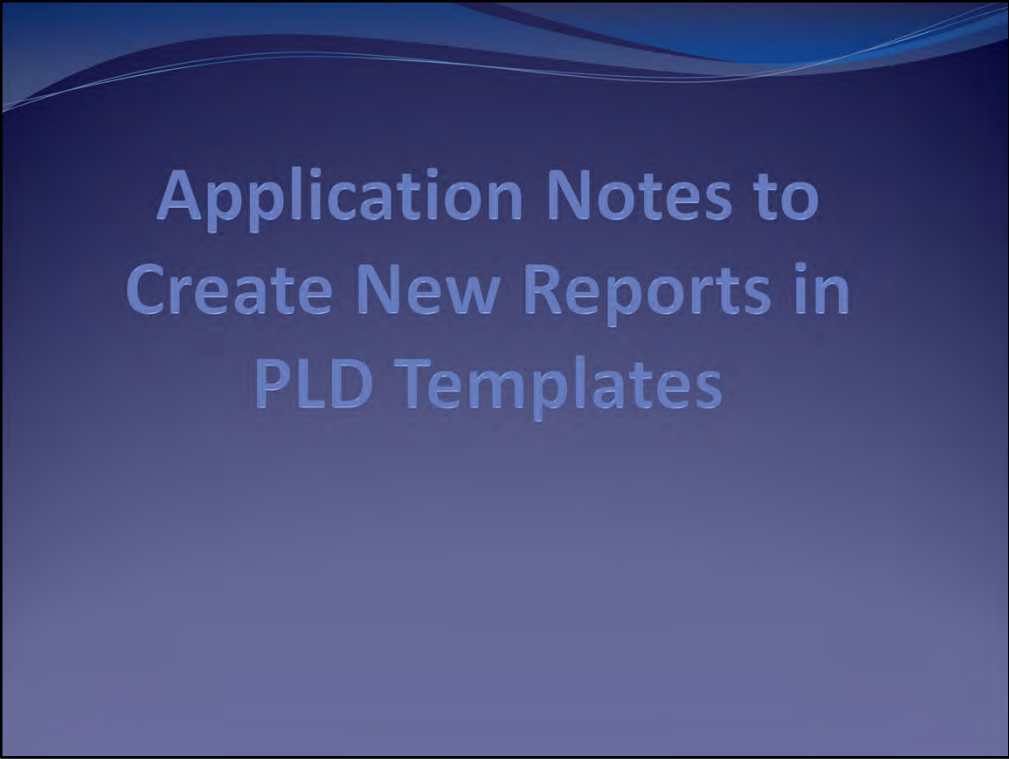


The **Export PDF Report – Search by ID** button will export a PDF file of a partnership report to a desired location on your network. There are two options for identifying the partnership for the report. You can enter a CSI number in the first pop-up window or enter a Global ID in the second pop-up window.

To export a report for a specific partnership, click on the **Export PDF Report – Search by ID** button under the “Run Partner Report” heading.

As seen in this slide, an “Output To” window will appear which is used to designate a location and file name for the report. The default name of the report, “Partner_Level_Report”, can be changed. Use the navigation pane on the left-hand side of the window to select a folder to which the PDF report will be saved. Select the **Autostart** checkbox if you would like the report to be opened automatically when the export and save process is complete. Then click **OK**. Selecting **Cancel** will return you to the front page without exporting the report.

After the partner ID search criteria are entered, the PDF file will be generated and the file will be saved in the selected location. If the **Autostart** checkbox was marked, a copy of the report will open in a PDF viewing application.

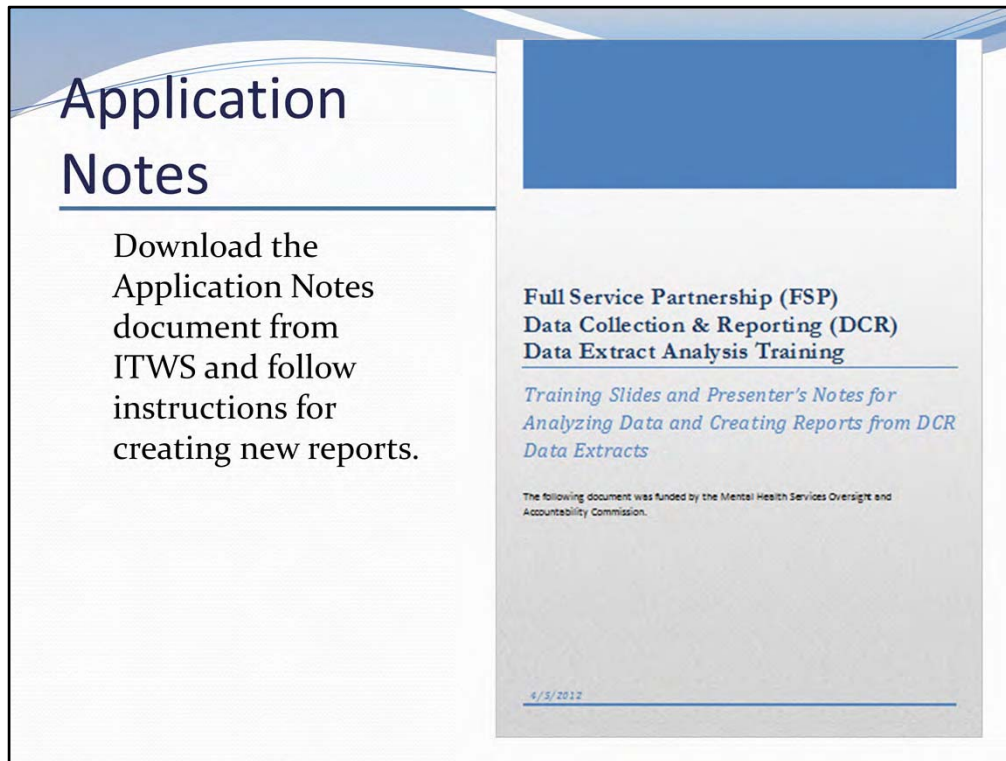


Application Notes to Create New Reports in PLD Templates

This Section Covers:

- Scope of Application Notes
- Overview of Application Notes Reports
- Overview of Application Notes Document Appendices
- Importing Date and Timeframe Dimension Tables
- Steps to Create Application Note #1 in Access

This section provides an overview of the Application Notes document and appendices, and it covers the detailed steps to create the Application Note #1 report in Microsoft Access.



The Application Notes provide instruction for using Microsoft Access and/or Microsoft Excel applications to analyze the Full Service Partnership (FSP) DCR CSV data downloads. These instructions provide two examples for analyzing the DCR CSV files to create reports for partners' length of service by provider. In the first Application Note, instructions are provided for creating a report which identifies the average length of service for partners by program and provider. This report also identifies the percent of quarterly (3M) assessments which were completed for the partners. The second Application Note provides instruction to create a report for the average length of service for partners based on reason of discontinuation from partnership.

In January 2012, County Data Quality Reports were provided for each county/region based on the data reported to the FSP DCR. The purpose of the County Data Quality Report was to describe all of each county's data and to identify inconsistent or outlying data points. Counties participated in a survey rating the utility of the section of the reports. The Application Notes are constructed for the report sections which received the highest score based on the results of the survey and provide instruction to reproduce two of the sub-reports from the Data Quality Reports by utilizing the county's downloaded FSP DCR data files at any point in time.

Application Note #1 Report

Average Length of Enrollment and 3Ms Completed for Partnerships Ever Served by Program / Provider

Program	Provider	Continuously Enrolled?	No. Of Partnerships	Ave. Length In Pgm to Date (Days)	3M % Complete
FSP, Youth					
		No	3	732	91.3 %
		Yes	32	685	95.7 %
	43AG	Yes	1	171	50 %
	43BC	Yes	7	885	78.8 %
	~ ALL PROVIDERS ~	No	3	732	91.3 %
	~ ALL PROVIDERS ~	Yes	40	707	91.6 %
FSP, Transitional					
		No	3	500	60 %
		Yes	45	249	61.3 %
	~ ALL PROVIDERS ~	No	3	500	60 %
	~ ALL PROVIDERS ~	Yes	45	249	61.3 %
FSP, Adults & Older Adult					
	3622	No	2	1069	4.5 %
	3622	Yes	30	1401	2.7 %
	3688	No	1	371	75 %
	3688	Yes	32	1118	0 %
	3681	No	28	977	19.1 %
	3681	Yes	209	884	15.4 %
	36D4	No	1	1088	0 %
	36D4	Yes	32	1134	9.9 %
	36DY	No	3	987	18.8 %
	36DY	Yes	69	762	29.9 %
	3611	Yes	1	1162	8.3 %
	~ ALL PROVIDERS ~	No	35	969	18.2 %
	~ ALL PROVIDERS ~	Yes	373	945	13.9 %
FSP, WRAP					
	36CH	Yes	114	813	18.6 %
	36D4	Yes	44	636	1.4 %
	~ ALL PROVIDERS ~	Yes	158	763	14.6 %

Application Note #1 explains how to create the report "Average Length of Enrollment and 3Ms Completed for Partnerships Ever Served by Program / Provider" (similar to Section 2.2 in the Data Quality Reports). An example of this report can be seen in this slide. The report summarizes the number of continuous or discontinuous partners, the average length of partnerships and percent of 3Ms completed by provider and by program.

Application Note #2 Reports

Number of Partnerships by Discontinued Reason for Each Program / Provider

FSP, Family	Provider	Target Criteria	Serving Jail	Placed Juvenile Hall	Not Located	Moved	Not Case	Institution	Discontinue	Deceased	Still in Program
	0000				9	0	5	1	9	0	76
	0000101735										1
	0000				2	1	1			1	4
	ALL PROVIDERS				11	9	6	1	9	6	82
FSP, TAY	Provider	Target Criteria	Serving Jail	Placed Juvenile Hall	Not Located	Moved	Not Case	Institution	Discontinue	Deceased	Still in Program
	0000				2	4	6	1	8	3	33
	0000				1	1	2		4	1	5
	0000				1						2
	0000				1						1
	ALL PROVIDERS				3	2	5	5	8	12	39
FSP, WRAP	Provider	Target Criteria	Serving Jail	Placed Juvenile Hall	Not Located	Moved	Not Case	Institution	Discontinue	Deceased	Still in Program
	1164827623				5	4	2	1	3		121
	1200155644										2
	1508734354								1		2
	1628279708										3
	0000				5	2	1	1	4		10
	ALL PROVIDERS				5	6	3	2	8		130
FSP, Transitional Adult	Provider	Target Criteria	Serving Jail	Placed Juvenile Hall	Not Located	Moved	Not Case	Institution	Discontinue	Deceased	Still in Program
	1033275365				7	12	14	4	10	19	116
	1209555596									1	2
	1679692950				2	1					2
	1001059143					1	1		1	2	12
	1001915691				1	2			1	1	11
	1902945680										1
	1912048137					1				1	3
	1942241500						1				
	ALL PROVIDERS				9	17	15	4	12	24	148

* Includes only continuously enrolled partners. (Excludes partner who were discontinued and reactivated after less than 1 year.)

Application Note #2 explains how to make two related reports: the "Number of Partnerships by Discontinued Reason for Each Program / Provider" (similar to Section 2.7 in the Data Quality Reports) and the "Average Length (Days) in Partnership by Program / Provider and Discontinued Reason" (similar to Section 2.8 in the Data Quality Reports). An example of these reports can be seen in this slide and the next slide.

The first report summarizes the number of partnerships by discontinued reason for each provider and program.

Application Note #2 Reports

2.8: Average Length (Days) in Partnership by Program / Provider and Discontinued Reason*

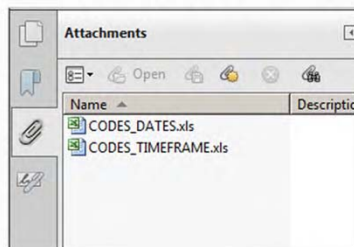
FSP, Family	Provider	Target Criteria	Serving Jail	Placed Juvenile Hall	Not Located	Moved	Met Goals	Institution	Discontinue	Deceased	Still in Program
	3000				295	555	905	1042	550	415	372
	0000011735										219
	3235				510	272	1480			117	1653
	ALL PROVIDERS				334	525	1056	1042	550	355	431
FSP, TAY	Provider	Target Criteria	Serving Jail	Placed Juvenile Hall	Not Located	Moved	Met Goals	Institution	Discontinue	Deceased	Still in Program
	552				477	379	789	1047	412	765	634
	3355		995		575	585	1130		734	739	1595
	3555				111						194
	3558			1172	454						1459
	ALL PROVIDERS		552	1034	419	420	859	1047	539	760	714
FSP, WRAP	Provider	Target Criteria	Serving Jail	Placed Juvenile Hall	Not Located	Moved	Met Goals	Institution	Discontinue	Deceased	Still in Program
	1154571623		170	330		569	155	245	435	475	255
	1200515544										425
	1558734354								550		237
	1525737505										237
	5555				563	547	490	325	950	950	1541
	ALL PROVIDERS		170	330	552	325	325	380	771		392
FSP, Transitional Adult	Provider	Target Criteria	Serving Jail	Placed Juvenile Hall	Not Located	Moved	Met Goals	Institution	Discontinue	Deceased	Still in Program
	1033270355		427	204		553	554	552	270	420	554
	1205555555										1027
	1575552253				255	255				510	1192
	1505555543					245			523	555	1155
	1501555591		105			454			49	325	1115
	1502555555										741
	15125555137					115				43	770
	1542541300						174				
	ALL PROVIDERS		427	179	334	370	452	270	432	400	1025

* Includes only continuity enrolled partners. (Excludes partner who were discontinued and reactivated after less than 1 year.)

The second report summarizes the average length of partnership by discontinue reason for each provider and program.

Before Creating a New Report

- Load DCR CSV files into PLD Templates
- Print the Worksheet from Appendix D
- Import Tables from Appendix A and B:
 1. Import the Table of Timeframe as CODES_TIMEFRAME
 2. Import the Table of Dates as CODES_DATES (optional)



It is often desired to separate data into length timeframes or into date ranges when creating reports. One way to quickly define partnership timeframes (e.g., number of quarters a partnership has completed) or date ranges (e.g., fiscal years) is to create a table with definitions of the several combinations of groupings which may be required depending on the purpose of the report.

Reference: Kimball, Ralph; Ross, Margy. (2002). *The Data Warehouse Toolkit: The Complete Guide to Dimensional Modeling, Second Edition*. New York: Wiley Computer Publishing.

Before starting, load the four DCR CSV files into the PLD Templates. Import the tables from Appendix A (required) and Appendix B (optional) of the Application Notes document into the database and name them as noted in this slide. As seen in this slide, the data tables can be accessed by selecting the paperclip icon in the PDF Application Notes document and double clicking on the file.

Print Worksheet in Appendix D

Appendix D: Query Record Count Worksheet

Application Note #1

Query Name	Description	Record Count
AP1_S01_001_Discontinuous	Partnerships discontinued and reestablished	
AP1_S02_001_3MtsCompleted	Partnerships with at least one or more 3Mts	
AP1_S03_001_DaysInService	Total number of partnerships	
AP1_S04_001_Variables_ByPartner	Total number of partnerships	
AP1_S05_001_Totals_ByProvider	Total number of providers by program by continuous partnership status	
AP1_S05_002_Totals_ByProgram	Total number of programs by continuous partnership status	
AP1_S05_003_Totals_System	One record for all continuous and one record for all discontinued partnerships in entire system	
AP1_S05_004_Totals_ALL	Combination of providers, programs and system queries	

Application Note #2

Query Name	Description	Record Count
AP2_S01_001_Discontinuous	Number of partnerships discontinued and reestablished	
AP2_S03_001_DaysInService	Total number of partnerships	
AP2_S02_001_DiscMaxDate	Number of partnerships currently discontinued	
AP2_S02_002_DiscMaxDate_CreatedLast	Number of partnerships currently discontinued	
AP2_S02_003_DiscReason_Last	Number of partnerships currently discontinued	
AP2_S04_001_DaysInService_ExcDiscontinuous	Number of continuous partnerships	
AP2_S05_001_DaysInService_DiscReason	Number of continuous partnerships	
AP2_S06_001_Variables_ByPartner	Number of continuous partnerships	
AP2_S07_001_Totals_ByProvider_n	Total number of providers by program	
AP2_S07_002_Totals_ByProgram_n	Total number of programs	
AP2_S07_003_Totals_System_n	One record for entire system	
AP2_S07_004_Totals_All_n	Combination of providers, programs and system queries	
AP2_S08_001_Totals_ByProvider_Length	Total number of providers by program	
AP2_S08_002_Totals_ByProgram_Length	Total number of programs	
AP2_S08_003_Totals_System_Length	One record for entire system	
AP2_S08_004_Totals_All_Length	Combination of providers, programs and system queries	

Appendix D contains a helpful worksheet to use while tracking and validating the number of records in each query while creating the reports.

Before Creating a New Report

- Timeframe Dimension table:

	A	B	C	D	E	F	G
1	DAYS_IN_SERVICE	MONTHS_COMPLETED_EXACT	MONTHS_COMPLETED_INT	QRTS_COMPLETED_EXACT	QRTS_COMPLETED_INT	QRT_CURRENT	YEARS_COMPLETED_EXACT
2	0	0	0	0	0	1	0
3	1	0.032854209	0	0.010951403	0	1	0.002737851
4	2	0.065708419	0	0.021902806	0	1	0.005475702
5	3	0.098562628	0	0.032854209	0	1	0.008213552
6	4	0.131416838	0	0.043805613	0	1	0.010951403
7	5	0.164271047	0	0.054757016	0	1	0.013689254
8	6	0.197125257	0	0.065708419	0	1	0.016427105
9	7	0.229979466	0	0.076659822	0	1	0.019164956
10	8	0.262833676	0	0.087611225	0	1	0.021902806
11	9	0.295687885	0	0.098562628	0	1	0.024640657
12	10	0.328542094	0	0.109514031	0	1	0.027378508
13	11	0.361396304	0	0.120465435	0	1	0.030116359

The Microsoft Excel file displayed in this slide defines the following groupings of partnership length timeframes based on the number of days in partnership service. Import this file as a new table in a Microsoft Access database to assist in aggregating and summarizing data based on the length of service for a partnership.

Timeframes Defined based on Days in Service

1. Months – Exact Fraction Completed
2. Months – Rounded to Total Completed
3. Quarters – Exact Fraction Completed
4. Quarters – Rounded to Total Completed
5. Years – Exact Fraction Completed
6. Years – Rounded to Total Completed
7. Timeframe – Three-Month Labels (e.g, “3Months”, “6Months”, etc.)
8. Timeframe Categories – Simple grouping example based on Timeframe field
9. 3Ms Due – The number of 3Ms which would be due based on the number of days in service

Before Creating a New Report

- Dates Dimension Table

	A	B	C	D	E	F	G	H	I	J
1	DATE VALUE	MONTH_NO	MONTH_NAME	DAY_OF_MONTH	YEAR_NO	MONTH_AND_DAY	DAY_OF_WEEK_NO	DAY_OF_WEEK_NAME	WEEKEND_OR_WEEKDAY	FY
8674	9/29/2008	9 Sep		29	2008	9/29	2 Mon	Weekday		2008/2009
8675	9/30/2008	9 Sep		30	2008	9/30	3 Tue	Weekday		2008/2009
8676	10/1/2008	10 Oct		1	2008	10/1	4 Wed	Weekday		2008/2009
8677	10/2/2008	10 Oct		2	2008	10/2	5 Thu	Weekday		2008/2009
8678	10/3/2008	10 Oct		3	2008	10/3	6 Fri	Weekday		2008/2009
8679	10/4/2008	10 Oct		4	2008	10/4	7 Sat	Weekend		2008/2009
8680	10/5/2008	10 Oct		5	2008	10/5	1 Sun	Weekend		2008/2009
8681	10/6/2008	10 Oct		6	2008	10/6	2 Mon	Weekday		2008/2009
8682	10/7/2008	10 Oct		7	2008	10/7	3 Tue	Weekday		2008/2009
8683	10/8/2008	10 Oct		8	2008	10/8	4 Wed	Weekday		2008/2009
8684	10/9/2008	10 Oct		9	2008	10/9	5 Thu	Weekday		2008/2009
8685	10/10/2008	10 Oct		10	2008	10/10	6 Fri	Weekday		2008/2009
8686	10/11/2008	10 Oct		11	2008	10/11	7 Sat	Weekend		2008/2009

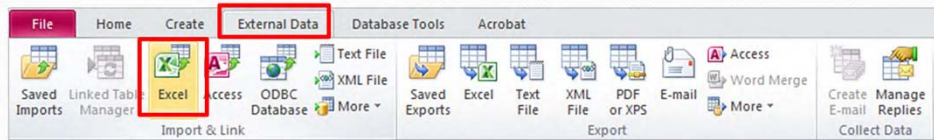
The Microsoft Excel file displayed in this slide defines the following groupings of dates. Import this file as a new table in a Microsoft Access database to assist in aggregating and summarizing data based on any date field in the FSP DCR data.

Date Groupings Defined

1. Month Number – Month Number in Year (1 to 12)
2. Month Name – Name of Month (Jan – Dec)
3. Day of Month – (1 to 31)
4. Year Number – Four digit year (1984 to 2024)
5. Month and Day – Formatted as Month/Day (1/1 to 12/31)
6. Day of Week – Weekday Number Starting on Sunday (1 to 7)
7. Weekend or Weekday – Flag for Weekend or Weekday (Weekend, Weekday)
8. Fiscal Year (FY) – Fiscal Year Formatted as Year/Year (1984/1985 to 2024/2025)
9. Calendar Year (CY) Quarter (QRT) – (1 to 4)
10. FY Qrt – (1 to 4)
11. CY and QRT – Formatted as Year_Q# (1985_Q1 to 2024_Q4)
12. FY and QRT – Formatted as FY_Q# (1984/1985_Q3 to 2024/2025_Q2)

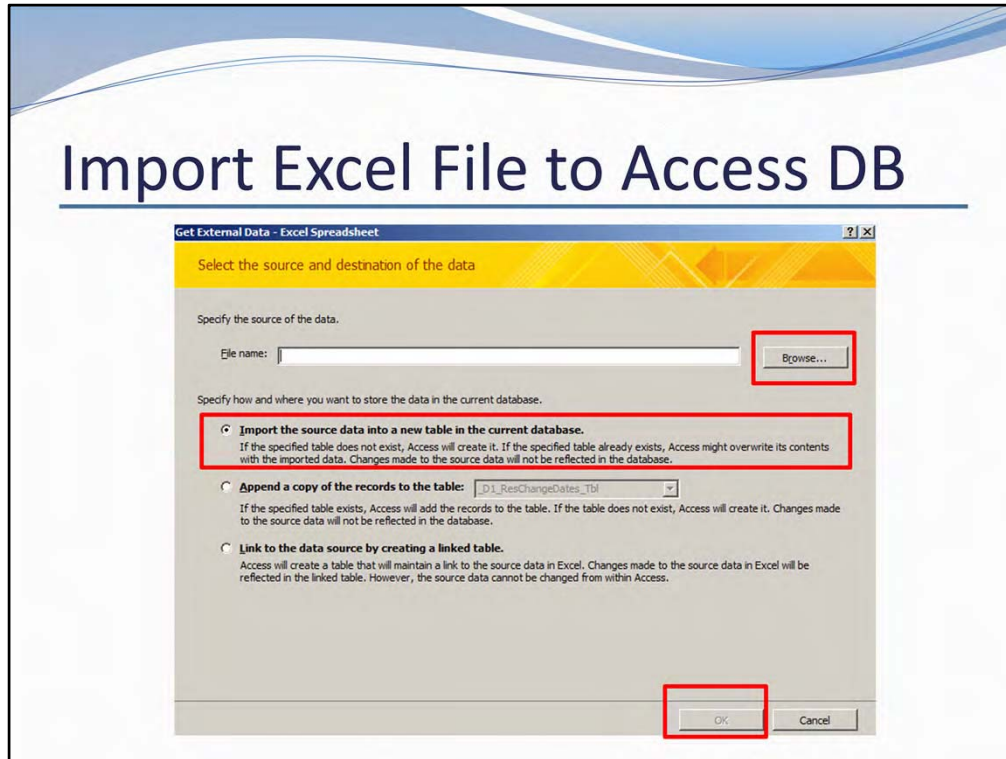
Import Excel File to Access DB

- From the PLD Templates:
 - Select External Data Menu
 - Select Excel Button



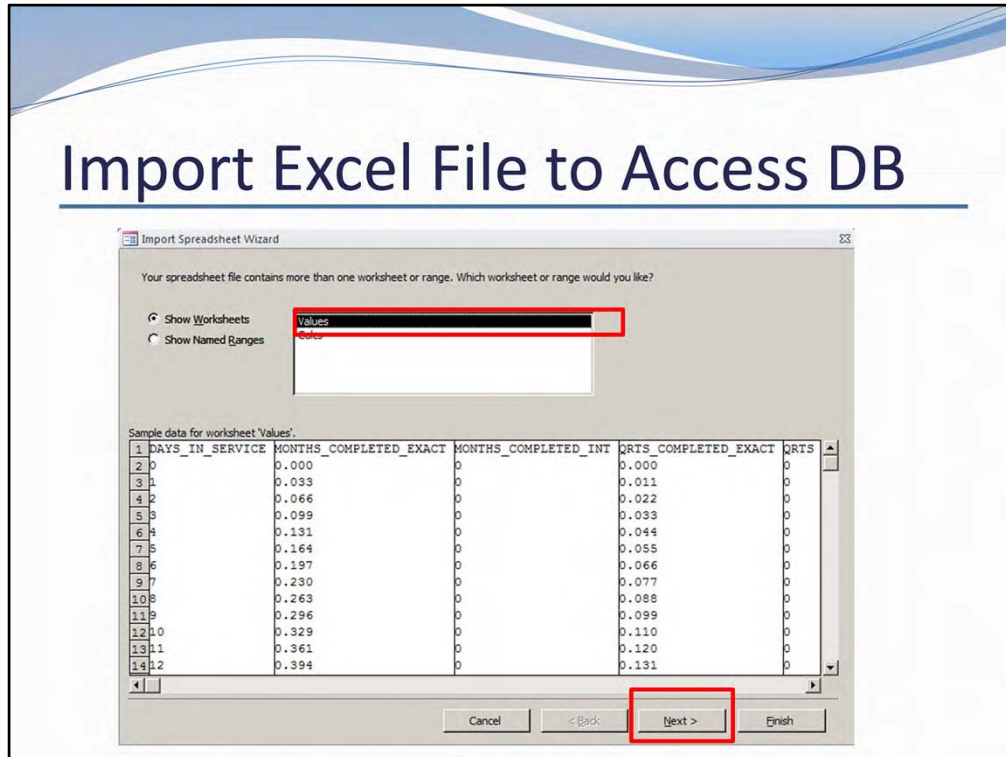
After saving the Timeframe and Date Dimension tables to a location on your network, open the PLD Templates and select the **External Data** menu item and then the **Excel** button to begin the import process.

Import Excel File to Access DB



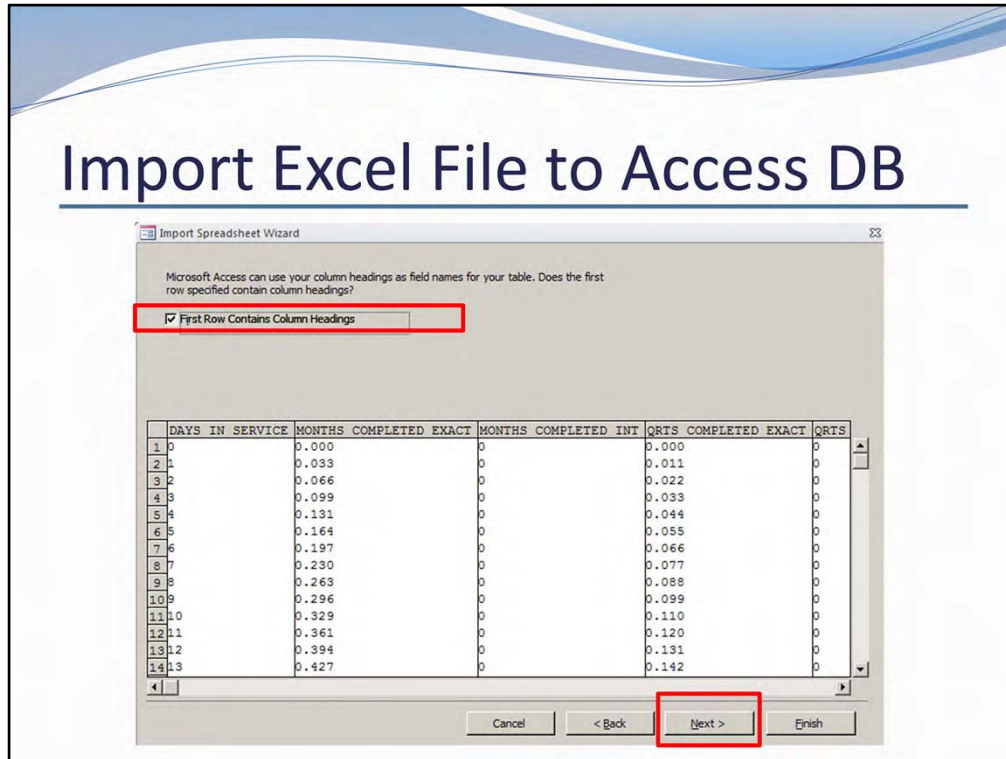
Select **Browse** to locate the Excel file. Select to **Import the source data into a new table in the current database**. Select **OK**.

Import Excel File to Access DB



Select the worksheet, and select **Next**.

Import Excel File to Access DB



Check the **First Row Contains Column Headings**, and select **Next**. Select **Next** again on the next screen.

Import Excel File to Access DB

Import Spreadsheet Wizard

Microsoft Access recommends that you define a primary key for your new table. A primary key is used to uniquely identify each record in your table. It allows you to retrieve data more quickly.

☐ Let Access add primary key.

☒ Choose my own primary key. DAYS_IN_SERVICE

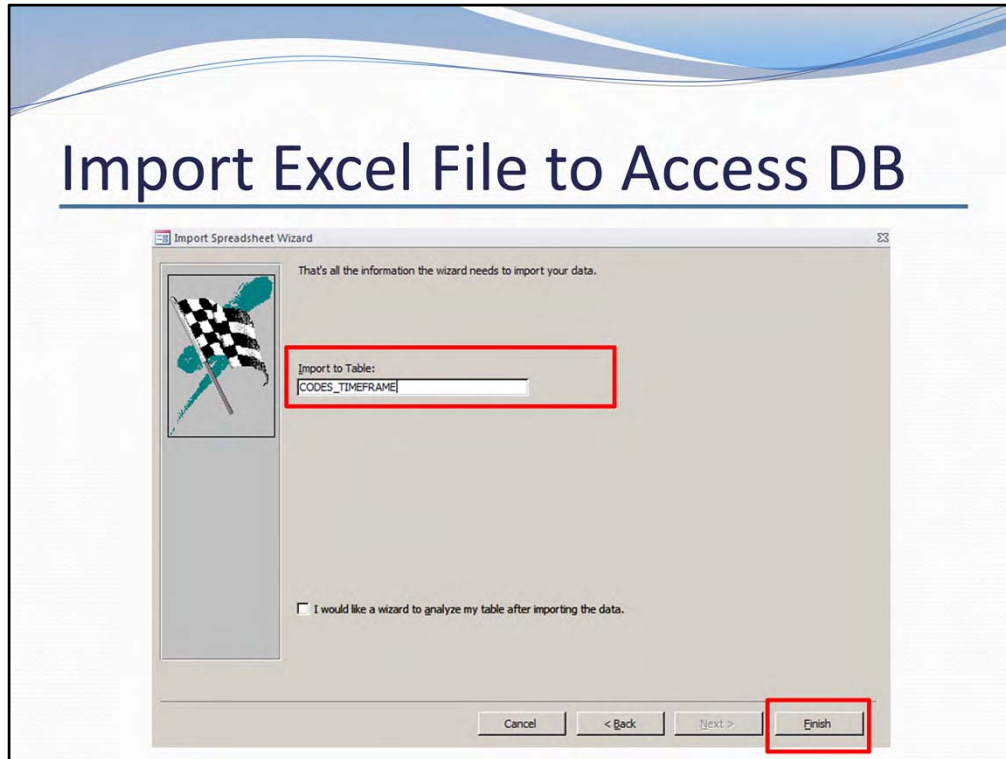
☐ No primary key.

	DAYS IN SERVICE	MONTHS COMPLETED EXACT	MONTHS COMPLETED INT	QRTS COMPLETED EXACT	QRTS
1	0	0.000	0	0.000	0
2	1	0.033	0	0.011	0
3	2	0.066	0	0.022	0
4	3	0.099	0	0.033	0
5	4	0.131	0	0.044	0
6	5	0.164	0	0.055	0
7	6	0.197	0	0.066	0
8	7	0.230	0	0.077	0
9	8	0.263	0	0.088	0
10	9	0.296	0	0.099	0
11	10	0.329	0	0.110	0
12	11	0.361	0	0.120	0
13	12	0.394	0	0.131	0
14	13	0.427	0	0.142	0

Cancel < Back Next > Finish

Select to **Choose my own primary key** and select the field **DAYS_IN_SERVICE** from the drop-down menu. Select **Next**.

Import Excel File to Access DB



In the **Import to Table** box, type the table name: CODES_TIMEFRAME or CODES_DATES for the appropriate file. Select **Finish**. The table is now imported into the PLD templates.

Working in Microsoft Access

- Beginning users can reference Chapter 1 for review of:
 - Types of Queries Used:
 - Select Query
 - Total Query
 - Crosstab Query
 - Union Query
 - Joining Tables and Sub-Queries
 - Inner Join
 - Outer Join
 - Adding Criteria to the Query Definition
 - Renaming Fields
 - Defining New Formulas in the Query Definition
 - Query View Options

The step-by-step instructions in these Application Notes are designed as a simplified modular approach to utilizing Microsoft Access for beginning users.

The step-by-step instructions for the Application Notes assume the users have some basic knowledge of Microsoft Access.

These topics will be covered during the process of creating the reports in this presentation. Refer to the Application Notes (completed 4/5/2012) at Chapter 1 and section “Working in Microsoft Access” on page 8 as a concise reference for these topics.

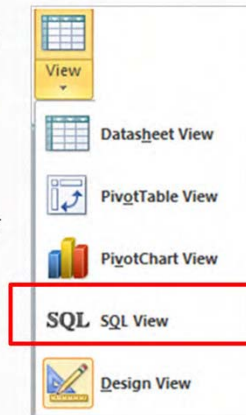
Steps to Create App. Note #1 Report:

1. Create a list of partners who have been discontinued and reestablished using KET status
2. Count the number of 3Ms completed for each partner
3. Calculate the length in service for each partner
4. Combine lists and create additional variables by partner
5. Calculate Totals
 - Total across providers
 - Total across programs
 - Total across county/system wide
 - Perform a union query to combine all totals queries
6. Create a report using the MS Access Report Wizard

Once the Microsoft Access database contains the building blocks described previously in this section, the report can be constructed through the six steps listed in this slide.

SQL to Support Queries

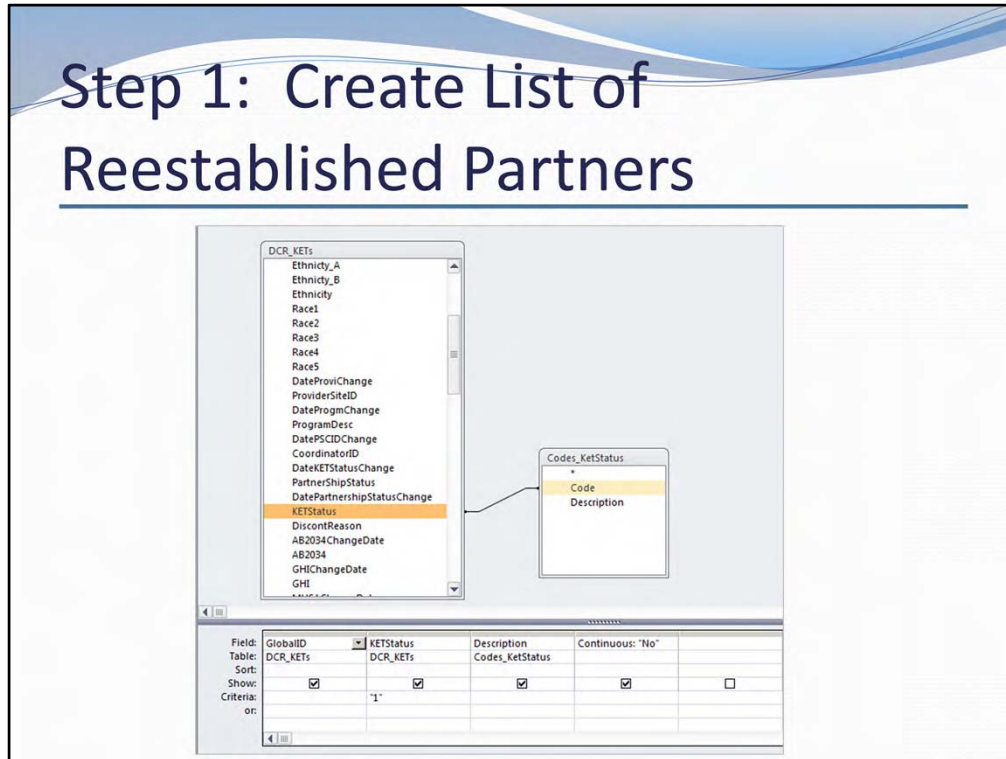
- Appendix C of Application Notes document contains the code in support of all queries we are about to create
- Copying and pasting SQL code from Appendix C into the **SQL View** window can quickly recreate the queries



Appendix C from the Application Notes document provides the Microsoft Access SQL code for all of the queries created in the Application Notes. The SQL code assumes the user is utilizing the PLD Templates database offered by the MHSOAC. This code also assumes the user has imported the CODES_TIMEFRAME (from Appendix A) and the CODES_DATES (from Appendix B) tables into the PLD Templates.

Copying and pasting this code into the SQL view of an empty Microsoft Access query within the PLD Templates will quickly recreate the queries designed in these Application Notes. This code is provided for user convenience in testing and troubleshooting or recreating the design of the queries.

Step 1: Create List of Reestablished Partners



The first step for this report is to create a list of all of the partners who were discontinued and reestablished for the same partnership. These partners will be counted as “No” in the **Continuously Enrolled?** column of the report. Partners not included in this list will be counted as “Yes” for that column.

1. With the PLD Templates open in Microsoft Access, select **Create > Query Design**.
2. In the **Show Tables** pop-up window, select and add the following two tables to the query: **DCR_KETs**, **Codes_KetStatus**. Then select the **Close** button.
3. As seen in this slide, select the **[KETStatus]** field within the **DCR_KETs** table, and drag and drop the field onto the **[Code]** field of the **Codes_KetStatus** table to create an inner join between the tables.
4. As seen in this slide, add the **DCR_KETs.[GlobalID]**, **DCR_KETs.[KETStatus]**, **Codes_KetStatus.[Description]** fields to the query definition spreadsheet.
5. As seen in this slide, create a fourth variable by typing the following into a blank column of the query design: **Continuous: “No”**. This will create a variable in the query named **[Continuous]** and assign the value “No” to all records.
6. As seen in this slide, add the criteria of “1” to the **[KETStatus]** field of the query. This will limit the criteria to pull back only those records in which a partnership was reestablished.

Step 1: Create List of Reestablished Partners

- In the **SQL View**, add the word **Distinct** to the query

```
SELECT DISTINCT DCR_KETs.GlobalID, DCR_KETs.KETStatus, Codes_KetStatus.Description, "No" AS Continuous  
FROM Codes_KetStatus INNER JOIN DCR_KETs ON Codes_KetStatus.Code = DCR_KETs.KETStatus  
WHERE (((DCR_KETs.KETStatus)="1"));
```

Running the query now will bring back all KET records for a reestablishment activity. A partnership may have been discontinued and reestablished multiple times. However, we only want a list of unique partnership identifiers for partnerships with any reestablishment activity, regardless of how many times it occurred. Therefore, to remove duplicates, we will choose to select distinct records.

As seen in this slide, move to the **SQL View** and insert the word **DISTINCT** after the word **SELECT**. This will remove any duplicate rows from our query, resulting in one record per **[GlobalID]** with a **[KETStatus]** equal to "1".

Step 1: Create List of Reestablished Partners

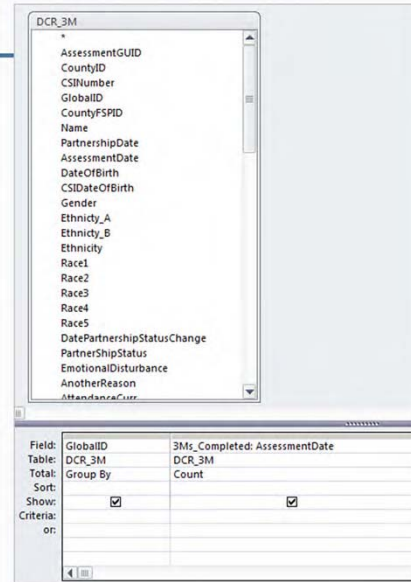
- Inspect the Query
- Write down the number of records on worksheet
- Save the query as **AP1_S01_001_Discontinuous**

GlobalID	KETStatus	Description	Continuous
000026d9-02d4-48c4-8cea-f0c0	1	Reestablished	No
003acbd3-c8b5-4a48-b2a3-bf0a	1	Reestablished	No
003b079b-4187-4290-a1a7-509f	1	Reestablished	No
0041866b-ce51-41e0-bfd6-669a	1	Reestablished	No
0048ae1d-8465-4654-9ee6-f7e1	1	Reestablished	No
00507b13-c3f0-449d-9f4a-f89a	1	Reestablished	No
005462e2-f24f-4d85-b15f-1af1	1	Reestablished	No
0069add3-7072-4f5a-a56b-5ae1	1	Reestablished	No
00952c94-b507-47ef-b849-859f	1	Reestablished	No
00c3e5f9-017c-4a2d-9576-1166	1	Reestablished	No
00ee975b-6436-48b3-aede-c1f1	1	Reestablished	No
0118ee70-dd7a-40c4-b223-0fd1	1	Reestablished	No
014c0569-1317-437d-9cb0-6ea1	1	Reestablished	No
019a20c3-a855-4888-8556-2c13	1	Reestablished	No

As seen in this slide, move to the datasheet view to inspect the results of the query. Write down the number of records (i.e., partnerships ever discontinued and reestablished) on the worksheet from Appendix D of the Application Notes document as reference. Save the query as **AP1_S01_001_Discontinuous**.

Step 2: Calculate Number of 3Ms Complete by Partner

- Show the number of 3Ms submitted for all partners with at least one 3M
- If a partner has never had a 3M submitted, then the partner will not exist in the results of this query



Step 2 involves calculating the number of 3Ms ever submitted for each partner. If a partner has never had a 3M submitted, then the partner will not exist in the results of this query. This query will show the number of 3Ms submitted for all partners with at least one 3M.

1. With the PLD Templates open in Microsoft Access, select **Create > Query Design**.
2. In the **Show Tables** pop-up window, select and add the following table to the query: **DCR_3M** table. Then select the **Close** button.
3. Right click in the query definition datasheet in the bottom half of the window and choose to add a **Total** row to the query definition.
4. As seen in this slide, add the **[GlobalID]** and choose Group By from the drop-down selections in the **Total** row.
5. As seen in this slide, add the **[AssessmentDate]** field to the query. Select the **Count** operator from the **Total** row drop-down box. Rename the field by typing **3Ms_Completed:** in front of the original field name.

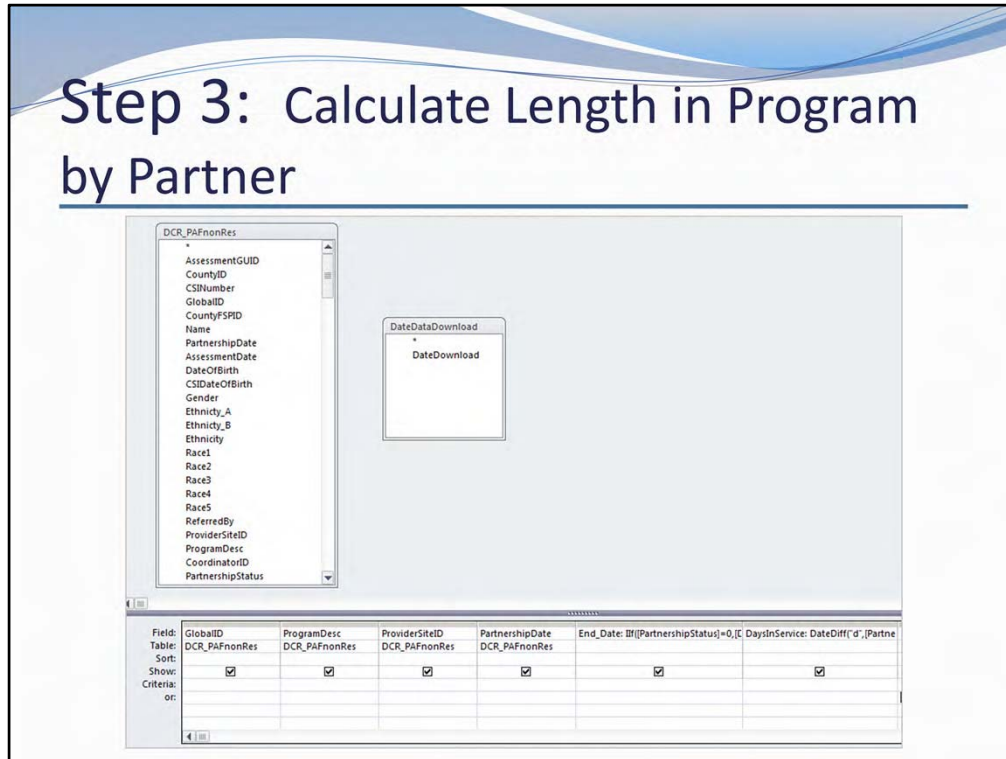
Step 2: Calculate Number of 3Ms Complete by Partner

- Inspect the results of the query
- Write down the number of records
- Save the query as **AP1_So2_001_3MsCompleted**

GlobalID	3Ms_Completed
000026d9-02d4-48c4-8cea-	5
0002aa56-3478-411c-9b37-	8
000332a0-b752-43e2-a284-	4
00036466-5344-48c9-a2ba-	2
0005d5d1-f5a6-47f8-9efa-a	5
00063f91-73bb-470f-9997-3	6
000d82a2-0ffc-40f0-8c4a-8c	2
000ec902-acad-4e87-8104-	1
0013afb6-53e5-4721-8e26-	1
0017532f-04d5-47ae-a7b4-	11
001e3d28-57af-4a26-9005-8	2
001e9e18-1351-47b0-807f-	12
001efb0d-d731-431f-9ae4-	7
002220ed-c4f8-48ca-9746-c	12

As seen in this slide, move to the datasheet view to inspect the results of the query. Write down the number of records (i.e., partnerships with at least one or more 3Ms) on the worksheet from Appendix D of the Application Notes document as reference. Save the query as **AP1_S02_001_3MsCompleted**.

Step 3: Calculate Length in Program by Partner



Step 3 involves calculating the number of days a partnership existed. Some partnerships may have been discontinued, and some may still be active. Therefore, for active partnerships, you will need to identify an end date for the calculation. The end date is usually determined as the end date defined when the CSV files were extracted from the FSP DCR. The extraction is a static snapshot of all of the partnerships up to the date of extraction.

1. With the PLD Templates open in Microsoft Access, select **Create > Query Design**.
2. In the **Show Tables** pop-up window, select and add the following tables to the query: **DCR_PAFnonRes** and the **DateDataDownload** table. Then select the **Close** button. Do not join the tables.
3. As seen in this slide, select and add the following fields to add to the query: **DCR_PAFnonRes.[GlobalID]**, **DCR_PAFnonRes.[ProgramDesc]**, **DCR_PAFnonRes.[ProviderSiteID]**, **DCR_PAFnonRes.[PartnershipDate]**.
4. If the **DCR_PAFnonRes.[PartnershipStatus] = 0**, then the partnership is currently discontinued, and the date the partnership was discontinued is stored in the **DCR_PAFnonRes.[DatePartnershipStatusChange]** field. Otherwise, the partnership is active, and the end date defined when the CSV files were extracted should be used to calculate the length of partnership. As seen in this slide, select an empty column of the query definition datasheet, and enter the following formula to identify the correct end date

to use when calculating the length of partnership.

End_Date: If([PartnershipStatus]=0, [DatePartnershipStatusChange],
[DateDataDownload].[DateDownload])

5. Now, calculate the length the partnership was in service by counting the number of days between the partnership start date and the end date. As seen in this slide, select an empty column of the query definition datasheet, and enter the following formula to calculate the number of days the partnership existed.

DaysInService: DateDiff("d",[PartnershipDate],[End_Date])

Note: **DateDiff** is a MS Access function which helps calculate the difference between two dates. The function takes three parameters. The first parameter, "d", defines the calculation should return the number of days. The second parameter is the start date for the calculation, and the third parameter is the end date for the calculation.

Step 3: Calculate Length in Program by Partner

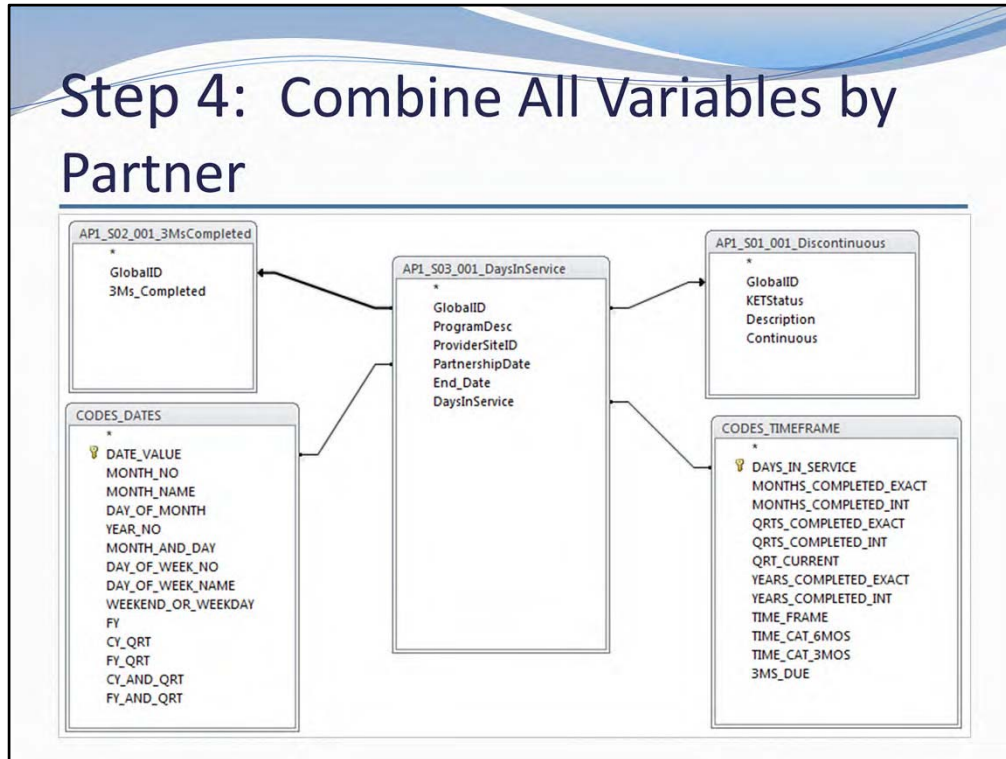
- Inspect the results of the query
- Write down the number of records
- Save the query as **AP1_So3_001_DaysInService**

GlobalID	ProgramDesc	ProviderSiteID	PartnershipDate	End_Date	DaysInService
074f58f7-9aa0-498c	TAY FSP	1234	11/2/2010	1/15/2012	439
0b9cf2cb-c724-41c1	Wraparound	1234	4/7/2009	8/18/2010	498
0ecb79a5-1190-4b6	Wraparound	1234	6/7/2007	6/20/2008	379
0f3e5f66-89ef-4657	Adult FSP	1234	12/3/2010	1/15/2012	408
115a7401-4320-48c	Adult FSP	1234	7/8/2008	1/15/2012	1286
15d2873f-0591-4db	TAY FSP	1234	3/12/2008	11/20/2008	253
19cb7956-3373-48d	Adult FSP	1234	12/17/2008	2/10/2010	420
1a312cba-37e5-4e2	Wraparound	1234	1/11/2011	1/15/2012	369
1b5eae0-9b4d-45f	Wraparound	1234	9/1/2006	1/17/2008	503
1b9ce01c-8d75-4ee	Wraparound	1234	6/15/2009	1/15/2012	944
1d554b0d-e177-4b1	Wraparound	1234	6/13/2007	9/15/2007	94
1f32bb6c-add9-4d2	Older Adult FSP	1234	10/13/2009	1/15/2012	824
2353a1d1-35f9-492	Wraparound	1234	5/18/2011	1/15/2012	242

Move to the datasheet view to inspect the results of the query. Write down the number of records (i.e., total number of partnerships) on the worksheet from Appendix D of the Application Notes document as reference.

Save the query as **AP1_S03_001_DaysInService**.

Step 4: Combine All Variables by Partner



Step 4 involves joining information from all of the previously created queries. This query will result in one record per partner.

1. With the PLD Templates open in Microsoft Access, select **Create > Query Design**.
2. In the **Show Tables** pop-up window, select and add the following two tables from the Tables tab: **CODES_TIMEFRAME**, **CODES_DATES**. Select the **Queries** tab and add the following three queries: **AP1_S03_001_DaysInService**, **AP1_S02_001_3MsCompleted**, **AP1_S01_001_Discontinuous**. Then select the **Close** button.

3. As seen in this slide, create the following joins between the five tables/queries:

- Inner join between **AP1_S03_001_DaysInService.[PartnershipDate]** and **CODES_DATE.[DATE_VALUE]**
- Inner join between **AP1_S03_001_DaysInService. [DaysInService]** and **CODES_TIMEFRAME.[DAYS_IN_SERVICE]**
- Outer join from **AP1_S03_001_DaysInService.[GlobalID]** to **AP1_S02_001_3MsCompleted.[GlobalID]**
- Outer join from **AP1_S03_001_DaysInService.[GlobalID]** to **AP1_S01_001_Discontinuous.[GlobalID]**

After you have created a join on two fields, right click on the line indicating the join and change it to an outer join (as indicated by a directional arrow) as needed.

Step 4: Combine All Variables by Partner

- Add fields to query definition
- Enter formulas as new fields in query:
 - **Continuous_Enrolled:** IIf([Continuous] Is Not Null,[Continuous],"Yes")
 - **3Ms_Complete:** IIf([3Ms_Completed] Is Not Null,[3Ms_Completed],0)

Field:	3MS_DUE	3Ms_Complete: IIf([3Ms_Completed] Is Not Null,[3Ms_Completed],0)	Continuous_Enrolled: IIf([Continuous] Is Not Null,[Continuous],"Yes")	FY_Enrolled: FY
Table:	CODES_TIMEFRAME			CODES_DATES
Sort:				
Show:	☒	☒	☒	☒
Criteria:				
or:				

4. Add all of the fields from the **AP1_S03_001_DaysInService** to the query definition.
5. Add the **CODES_TIMEFRAME.[3MS_DUE]** field.

Note: Optionally, add any other fields from the **CODES_DATE** table, such as **[FY_AND_QRT]** (i.e., fiscal year and quarter) by which you may later want to aggregate the data.

6. Identify the partners who were not continuously enrolled, and set the remaining partners to "Yes" for the **[Continuous]** field. Select an empty column of the query definition datasheet, and enter the following formula to identify continuous or discontinuous partnerships.

Continuous_Enrolled: IIf([Continuous] Is Not Null,[Continuous],"Yes")

7. Now, you will need to select the number of 3Ms completed, which was previously calculated for partnerships with at least one 3M completed. However, some partners may not have had a 3M completed, and a formula will need to set the value for this variable to zero for these partnerships. Select an empty column of the query definition datasheet, and enter the following formula to set the number of 3Ms completed for all partnerships.

3Ms_Complete: IIf([3Ms_Completed] Is Not Null,[3Ms_Completed],0)

Step 4: Combine All Variables by Partner

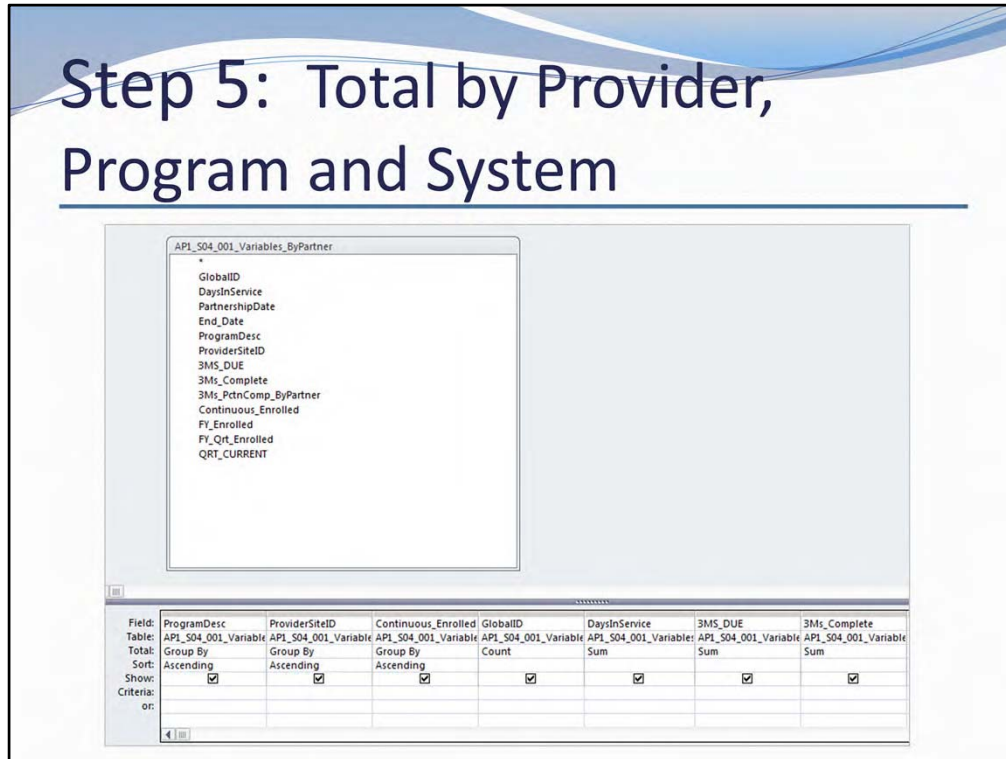
- Inspect the results of the query
- Write down the number of records
- Save the query as **AP1_S04_001_Variables_ByPartner**

GlobalID	DaysInService	PartnershipDate	End_Date	ProgramDesc	ProviderSiteID	3MS_DUE	3Ms_Complete	Continuous
074f58f7-9aa0-498d	439	11/2/2010	1/15/2012	TAY FSP	1234	4	0	Yes
0b9cf2cb-c724-41cb	498	4/7/2009	8/18/2010	Wraparound	1234	5	3	Yes
0ecb79a5-1190-4b6f	379	6/7/2007	6/20/2008	Wraparound	1234	4	4	Yes
0f3e5f66-89ef-4657	408	12/3/2010	1/15/2012	Adult FSP	1234	4	3	Yes
115a7401-4320-48c5	1286	7/8/2008	1/15/2012	Adult FSP	1234	14	12	Yes
15d2873f-0591-4dbc	253	3/12/2008	11/20/2008	TAY FSP	1234	2	2	Yes
19cb7956-3373-48d0	420	12/17/2008	2/10/2010	Adult FSP	1234	4	4	Yes
1a312cba-37e5-4e2f	369	1/11/2011	1/15/2012	Wraparound	1234	4	0	Yes
1b5eae0-9b4d-45b	503	9/1/2006	1/17/2008	Wraparound	1234	5	5	Yes
1b9ce01c-8d75-4ee1	944	6/15/2009	1/15/2012	Wraparound	1234	10	8	Yes
1d554b0d-e177-4bb	94	6/13/2007	9/15/2007	Wraparound	1234	1	1	No
1f32bb6c-add9-4d2e	824	10/13/2009	1/15/2012	Older Adult FSP	1234	9	0	Yes
2353a1d1-35f9-4921	242	5/18/2011	1/15/2012	Wraparound	1234	2	1	Yes
23917306-e067-4b8e	915	7/14/2009	1/15/2012	TAY FSP	1234	10	7	Yes

Move to the datasheet view to inspect the results of the query. Write down the number of records (i.e., total number of partnerships) on the worksheet from Appendix D of the Application Notes document as reference. The number of records in this query should match the number of records in the **AP1_S03_001_DaysInService** query.

Save the query as **AP1_S04_001_Variables_ByPartner**.

Step 5: Total by Provider, Program and System



Step 5 involves aggregating the data from step 4 into summaries by provider, program and the entire system (i.e., county).

1. With the PLD Templates open in Microsoft Access, select **Create > Query Design**.
2. In the **Show Tables** pop-up window, select the **Queries** tab and then select and add the query from previous step: **AP1_S04_001_Variables_ByPartner**. Then select the **Close** button.
3. Right click in the query definition spreadsheet, and add the **Total** row to the query definition.
4. As seen in this slide, add the following variables, and select the following operator in the **Total** row.

[ProgramDesc] Group By
[ProviderSiteID] Group By
[Continuous_Enrolled] Group By
[GlobalID] Count
[DaysInService] Avg
[3Ms_Due] Sum
[3Ms_Complete] Sum

Step 5: Total by Provider, Program and System

- Add fields to query definition
- Enter formulas as new fields in query
- Inspect the results of the query
- Write down the number of records
- Save the query as **AP1_S05_001_Total_ByProvider**

ProgramI	ProviderSite	Continuous	CountOfGlobalID	AvgOfDaysInService	3Ms_Due_Sum	3Ms_Comp_Sum	3Ms_PctnComp_ByProvider
1100,Senec. 1376790840		Yes	5	544	28	26	92.9
1100,Senec. 1447439906		No	1	702	7	7	100
1100,Senec. 1447439906		Yes	2	536	11	11	100
1100,Senec. 1497061873		Yes	2	198	4	4	100
1100,Senec. 1699924654		Yes	1	461	5	4	80
1100,Senec. 1730345760		Yes	3	575	17	14	82.4
1100,Senec. 1942490487		No	1	536	6	4	66.7
1100,Senec. 1942490487		Yes	1	161	1	1	100

5. Now calculate the percent of 3Ms completed for all partnerships aggregated by each combination of program, provider and continuously enrolled status. Select an empty column of the query definition datasheet, and enter the following formula. In order to avoid dividing by zero when no 3Ms are due for an aggregated group, this formula uses an IIF statement in the formula to insert null values in the results for those cases.

3Ms_PctnComp_ByProvider: IIF(Sum(AP1_S04_001_Variables_ByPartner.[3MS_DUE])=0, Null, Round(100*(Sum(AP1_S04_001_Variables_ByPartner.[3Ms_Complete])/Sum(AP1_S04_001_Variables_ByPartner.[3MS_DUE])),1))

Select the **Expression** option in the drop-down box of the **Total** row.

6. As seen in this slide, move to the datasheet view to inspect the results of the query. The query should display one record for each combination of provider, program and continuous or discontinuous partnership. Write down the number of records in the query.

7. Save the query as **AP1_S05_001_Total_ByProvider**.

Step 5: Total by Provider, Program and System

- Copy the query just created and save as **AP1_S05_002_Total_ByProgram**
- Open in **Design View**
- Replace the [ProviderSiteId] field with:
 - **ProviderSiteID: “zz~ ALL PROVIDERS ~zz”**

8. Copy and paste the query just created, and name the new query **AP1_S05_002_Total_ByProgram**.

9. Open the new query in **Design View**.

10. Now aggregate the data in this new query by all providers for each program. As seen in this slide, replace the [**ProviderSiteId**] field in the second column of the query definition with the following constant.

ProviderSiteID: “zz~ ALL PROVIDERS ~zz”

The z’s in the constant will help sort this summary row to the bottom of all other provider values. Alternatively, a space before the term will sort the row to the top of all providers, if there are no null provider values in your dataset.

Step 5: Total by Provider, Program and System

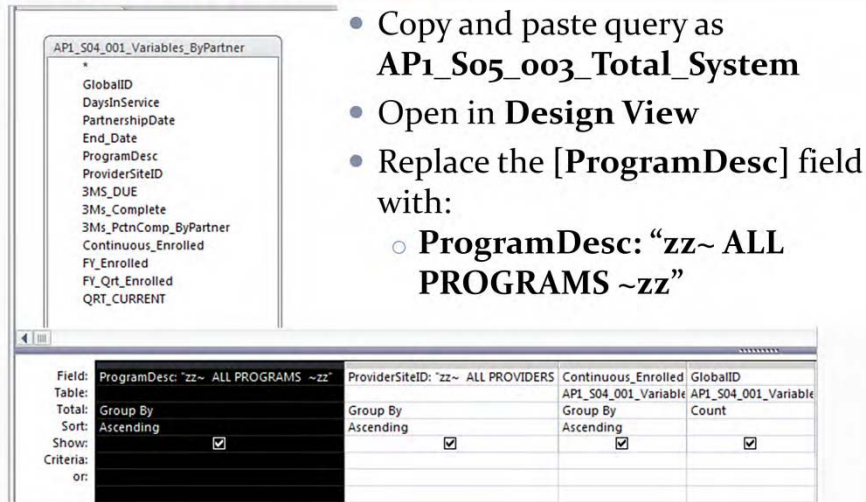
- Inspect the results of the query
- Write down the number of records
- Save and close the query

ProgramDe	ProviderSiteID	Continuous	CountOfGlobalID	AvgOfDAYSiNSERVICE	SumOf3MS_DL	SumOf3Ms_Cor	3Ms_PctnCom
3200,Citywide	zz~ ALL PROVIDERS ~zz	Yes	169	412	678	660	97.3
3300,SF First Ii	zz~ ALL PROVIDERS ~zz	No	2	908	19	15	78.9
3300,SF First Ii	zz~ ALL PROVIDERS ~zz	Yes	240	785	2007	1803	89.8
4000,FSA Olde	zz~ ALL PROVIDERS ~zz	No	2	952	20	20	100
4000,FSA Olde	zz~ ALL PROVIDERS ~zz	Yes	95	567	557	473	84.9
45RH,Shasta R	zz~ ALL PROVIDERS ~zz	No	6	749	47	45	95.7
45RH,Shasta R	zz~ ALL PROVIDERS ~zz	Yes	34	496	173	126	72.8

11. As seen in this slide, move to the datasheet view to inspect the results of the query. The query should display one record for each combination of program and discontinuous or continuous partnership. Write down the number of records in the query as reference. Save and close the query.

Step 5: Total by Provider, Program and System

- Copy and paste query as **AP1_S05_003_Total_System**
- Open in **Design View**
- Replace the [ProgramDesc] field with:
 - **ProgramDesc: “zz~ ALL PROGRAMS ~zz”**



Field:	ProgramDesc: "zz~ ALL PROGRAMS ~zz"	ProviderSiteID: "zz~ ALL PROVIDERS"	Continuous_Enrolled API_S04_001_Variable	GlobalID API_S04_001_Variable
Table:	Group By	Group By	Group By	Count
Sort:	Ascending	Ascending	Ascending	
Show:	☒	☒	☒	☒
Criteria:				
or:				

12. Copy and paste the query just created, and name the new query **AP1_S05_003_Total_System**.

13. Open the new query in **Design View**.

14. Now aggregate the data in this new query by the entire system of data. Replace the **[ProgramDesc]** field in the first column of the query definition with the following constant.
ProgramDesc: “zz~ ALL PROGRAMS ~zz”

Step 5: Total by Provider, Program and System

- Inspect the results of the query
- Write down the number of records
- Save and close the query

ProgramDesc	ProviderSiteID	Continuous_Enrolle	CountOfGlobalID	AvgOfDAYSINSERVICE	3Ms_Due_Sum	3Ms_Comp_Sum	3Ms_PctnComp
zz~ ALL PROGRAMS	zz~ ALL PROVIDERS	No	2037	737	15777	9641	61.1
zz~ ALL PROGRAMS	zz~ ALL PROVIDERS	Yes	45111	592	277987	156232	56.2

15. As seen in this slide, move to the datasheet view to inspect the results of the query. This query will display one record for all continuous partnerships and one record for all discontinuous partnerships in the entire system of data. Write down the number of records in the query as reference. Save and close the query.

Step 5: Total by Provider, Program and System

- Create Union Query
 - Select **Create > Query Design**
 - Select **Close** on Show Tables
 - Select **View > SQL or Union**
 - Type:

```
SELECT * FROM AP1_S05_001_Total_ByProvider;  
UNION  
SELECT * FROM AP1_S05_002_Total_ByProgram;  
UNION  
SELECT * FROM AP1_S05_003_Total_System;
```

16. Create one last query to combine the rows of the previous three queries in this step. Select **Create > Query Design**. Select the **Close** button in the **Show Tables** pop-up, and do not add any tables to the query. Select the **View > SQL** or the **Union** option for the query. Either of these options will redirect you to the **SQL View**. Type or paste the following SQL code to combine the rows in the previous three queries with a union.

```
SELECT * FROM AP1_S05_001_Total_ByProvider;  
UNION  
SELECT * FROM AP1_S05_002_Total_ByProgram;  
UNION  
SELECT * FROM AP1_S05_003_Total_System;
```


Step 5: Total by Provider, Program and System

- Inspect the results of the query
- Write down the number of records
- Save query as **AP1_S05_004_Total_ALL**

ProgramDesc	ProviderSiteID	Continuous	CountOfGlobalID	AvgOfDAYSINSERVICE	3Ms_Due_Sum	3Ms_Comp_Sum	3Ms_PctnComp_ByProvider
Adult FSP	1234	No	1	173	2	1	50
Adult FSP	1234	Yes	61	498	310	202	65.2
Adult FSP	zz" ALL PROVIDERS "zz	No	1	173	2	1	50
Adult FSP	zz" ALL PROVIDERS "zz	Yes	61	498	310	202	65.2
FSP	1234	Yes	1	1072	11	0	0
FSP	zz" ALL PROVIDERS "zz	Yes	1	1072	11	0	0
Older Adult FSP	1234	Yes	9	894	86	3	3.5
Older Adult FSP	zz" ALL PROVIDERS "zz	Yes	9	894	86	3	3.5
TAY FSP	1234	No	3	931	30	23	76.7
TAY FSP	1234	Yes	33	671	231	78	33.8
TAY FSP	zz" ALL PROVIDERS "zz	No	3	931	30	23	76.7
TAY FSP	zz" ALL PROVIDERS "zz	Yes	33	671	231	78	33.8
Wraparound	1234	No	1	94	1	1	100
Wraparound	1234	Yes	48	673	339	152	44.8
Wraparound	zz" ALL PROVIDERS "zz	No	1	94	1	1	100
Wraparound	zz" ALL PROVIDERS "zz	Yes	48	673	339	152	44.8
zz" ALL PROGRAMS "zz	zz" ALL PROVIDERS "zz	No	5	612	33	25	75.8
zz" ALL PROGRAMS "zz	zz" ALL PROVIDERS "zz	Yes	152	618	977	435	44.5

17. Move to the datasheet view to inspect the results of the query. The number of records should equal the sum of records from the previous three queries created in this step.

18. Save the query as **AP1_S05_004_Total_ALL**.

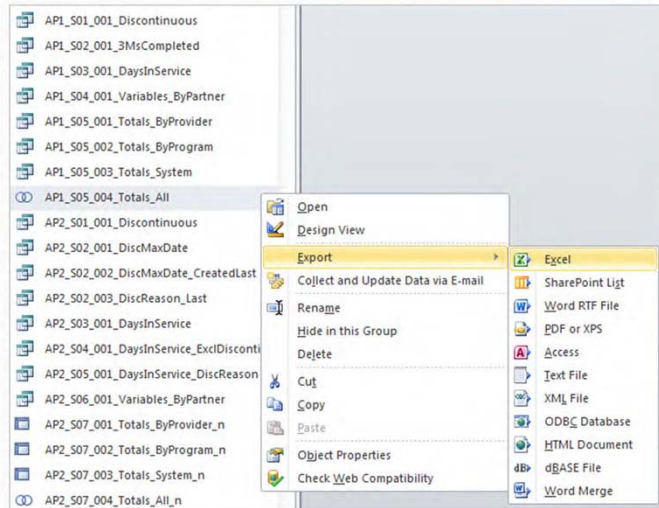
Step 6: Design Report

- Export last query to Excel or
- Create Access report

The last step in this process is to design the report. The final query, **AP1_S05_004_Total_ALL**, holds all of the data for the final table. This query can be exported into Microsoft Excel for formatting or into Microsoft Access to create a report template.

Step 6: Design Report - Excel

Right mouse
click on the
**AP1_S05_004
_Total_ALL**



1. With the PLD Templates open in Microsoft Access, right mouse click on the **AP1_S05_004_Total_ALL** and choose **Export > Excel**, as seen in this slide.
2. Provide a file name and browse to a location to save the Excel file.
3. Select **Export data with formatting and layout** and select **Open the destination file after the export operation is complete**. Click **OK**.
4. Your data is now in Microsoft Excel, and can be formatted for inclusion in a Microsoft Word report.

Step 6: Design Report - Access

Create > Report Wizard

Report Wizard

Which fields do you want on your report?
You can choose from more than one table or query.

Tables/Queries
Query: AP1_S05_004_Totals_All

Available Fields:

Selected Fields:

- ProgramDesc
- ProviderSiteID
- Continuous_Enrolled
- CountOfGlobalID
- AvgOfDAYSIN SERVICE
- 3Ms_Due_Sum
- 3Ms_Comp_Sum
- 3Ms_PctnComp_ByProvider

Buttons: Cancel, < Back, Next >, Finish

Alternatively, a report template can be created in Microsoft Access.

1. With the PLD Templates open in Microsoft Access, click once on the **AP1_S05_004_Total_ALL** query to highlight the query. Choose **Create > Report Wizard** in the report section of the menus. As seen in this slide, the selected query should show in the wizard. If the desired query is not showing in the drop-down box, then select the drop-down and locate the correct query.
2. As seen in this slide, select the >> button to move the entire set of fields into the **Selected Fields** box. Click **Next**.

Step 6: Design Report - Access

Group by
[ProgramDesc]

Do you want to add any grouping levels?

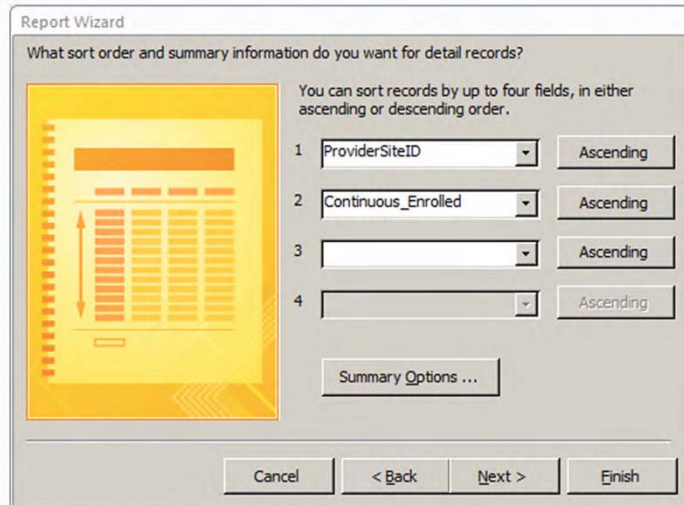
ProviderSiteID	>	ProgramDesc ProviderSiteID, Continuous_Enrolled, CountOfGlobalID, AvgOfDAYSINSERVICE, 3Ms_Due_Sum, 3Ms_Comp_Sum, 3Ms_PctnComp_ByProvider
Continuous_Enrolled	<	
CountOfGlobalID	↑	
AvgOfDAYSINSERVICE	↓	
3Ms_Due_Sum	Priority	
3Ms_Comp_Sum		
3Ms_PctnComp_ByProvider		

Grouping Options ... Cancel < Back Next > Finish

3. As seen in this slide, select the **[ProgramDesc]** and then select the > button to group the report sections by program. Select **Next**.

Step 6: Design Report - Access

Sort by:



The screenshot shows the 'Report Wizard' dialog box. The title bar says 'Report Wizard'. The main text asks 'What sort order and summary information do you want for detail records?'. Below this, there is a yellow box with a grid icon and a vertical double-headed arrow. To the right of this box, there is a list of four fields to sort by, each with a dropdown menu and an 'Ascending' button. The first field is 'ProviderSiteID', the second is 'Continuous_Enrolled', and the third and fourth are empty. Below the list is a 'Summary Options ...' button. At the bottom of the dialog are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

Field	Sort Order
1 ProviderSiteID	Ascending
2 Continuous_Enrolled	Ascending
3	Ascending
4	Ascending

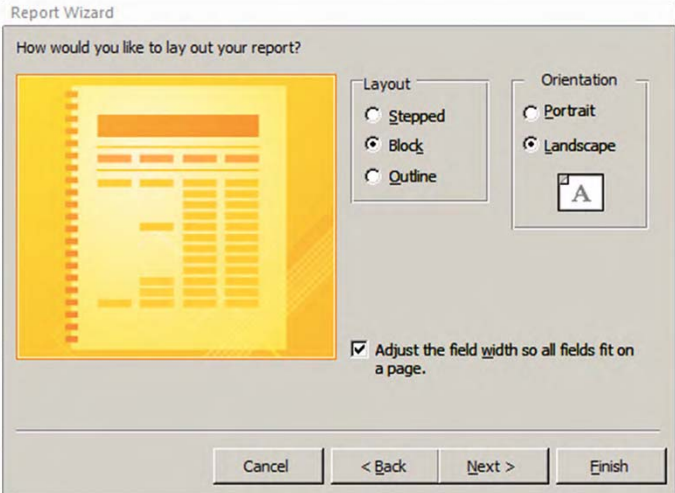
Summary Options ...

Cancel < Back Next > Finish

4. As seen in this slide, select to sort by **[ProviderSiteID]** and then **[Continuous_Enrolled]** fields from the drop-down boxes. Click **Next**.

Step 6: Design Report - Access

Block and
Landscape



Report Wizard

How would you like to lay out your report?

Layout

- ☐ Stepped
- ☒ Block
- ☐ Outline

Orientation

- ☐ Portrait
- ☒ Landscape

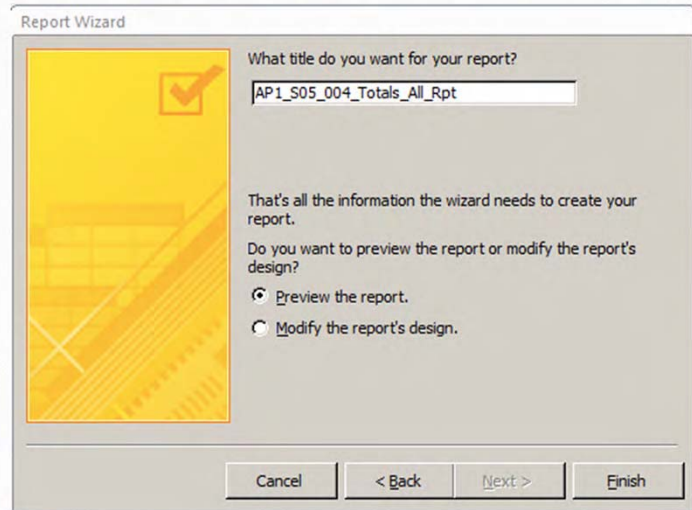
☒ Adjust the field width so all fields fit on a page.

Cancel < Back Next > Finish

5. As seen in this slide, select the **Block** layout and select the **Landscape** orientation. Click **Next**.

Step 6: Design Report - Access

Name the
Report



The screenshot shows a 'Report Wizard' dialog box. On the left is a yellow panel with a checkmark icon. The main area has the title 'What title do you want for your report?' followed by a text box containing 'AP1_S05_004_Totals_All_Rpt'. Below this, it says 'That's all the information the wizard needs to create your report.' and 'Do you want to preview the report or modify the report's design?'. There are two radio buttons: 'Preview the report.' (which is selected) and 'Modify the report's design.'. At the bottom are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

6. As seen in this slide, name the report **AP1_S05_004_Total_ALL_Rpt**. Click **Finish**.

Step 6: Design Report - Access

- Design View

Report Header									
AP1_S05_004 Totals All Rpt2									
Page Header									
ProgramDesc	ProviderSiteID	Continuous_Enrolled	GlobalID	FDAYSIN	SERVICE	3Ms_Due_Sum	3Ms_Comp_Sum	Provider	
ProgramDesc Header									
Detail									
ProgramDesc	ProviderSiteID	Continuous_Enrolled	CountC	AvgOfDAYSIN	SER	3Ms_Due_Sum	3Ms_Comp_Sum	3Ms_Pctr	
Page Footer									
=Now()					="Page " & [Page] & " of " & [Pages]				
Report Footer									

7. As seen in this slide, move to the **Design View** to change the design of the report. After the wizard creates the report, the report format can be optimized by rearranging the location of the fields.

Step 6: Design Report - Access

- Resize, rename and relocate fields

The screenshot shows the Access Report Design View for a report titled 'Average Length of Enrollment and 3Ms Completed for Partnerships Ever Served by Program / Provider'. The design is organized into sections: Report Header, Page Header, ProgramDesc Header, ProgramDesc Detail, Page Footer, and Report Footer. The Page Header section contains the report title. The ProgramDesc Header section contains the field 'Program'. The ProgramDesc Detail section contains the fields 'Provider', 'Continuous_Enrolled', 'CountOfGoldballID', 'IS_IN_SERVICE', and 'Provider%'. The Page Footer section contains the field '=Now()'. The Report Footer section contains the field '=Page " & [Page] & " of " & [Pages]'.

Average Length of Enrollment and 3Ms Completed for Partnerships Ever Served by Program / Provider					
Program	Provider	Continuous_Enrolled	No. OF Partnerships	Ave. Length In Pgm to Date (Days)	3M % Complete
ProgramDesc Header					
ProgramDesc Detail					
Provider	Continuous_Enrolled	CountOfGoldballID	IS_IN_SERVICE	Provider%	
Page Footer					
=Now()					
Report Footer					
=Page " & [Page] & " of " & [Pages]					

8. As seen in this slide you can resize, rename and relocate the fields and labels to match the following design or another format as desired. The following steps provide a quick overview of the steps required to change the report from the layout in the previous slide to this slide.

- Click in the label in the **Report Header** section and rename the report title.
- Click on each of the labels in the **Page Header** section and rename each label to match the new label titles in this slide.
- Hold the **Shift** key to simultaneously select all labels in the **Page Header** section, and move the labels down in the section to make room for the report title label. Click and drag to arrange each label in the **Page Header** section to match the layout in this slide.
- Drag and drop the report title from the **Report Header** section to the **Page Header** section.
- Minimize the size of the **Report Header** section by clicking and dragging upward on the lower section separator bar.
- Lengthen the **ProgramDesc Header** section by clicking and dragging downward on the lower section separator bar.
- Drag the **[ProgramDesc]** field from the **Detail** section to the **ProgramDesc Header** section.
- Select on the **ProgramDesc Header** bar and right-click and select **Properties** to display the properties window on the right side of the screen. In the **Format** tab, select the **Back Color** to be gray. Set the **Alternate Back Color** to be **No Color**.
- Select on the **Detail** bar, and in the **Format** tab of the **Properties** window, select the

Alternate Back Color to be **No Color**.

- Select the **[ProgramDesc]** field and in the **Properties** window, set the **Width** to 4" and set the **Back Style** to **Transparent**.
- Select each field in the **Detail** section and click and drag the left edges to resize the fields to resemble this slide.
- Align the fields in the **Detail** section underneath the corresponding label from the **Page Header** section.

Step 6: Design Report - Access

Average Length of Enrollment and 3Ms Completed for Partnerships Ever Served by Program / Provider					
Program	Provider	Continuously Enrolled?	No. Of Partnerships	Ave. Length In Pgm to Date (Days)	3M % Complete
FSP, Youth		No	3	732	91.3 %
		Yes	32	685	95.7 %
	43AG	Yes	1	171	50 %
	43BC	Yes	7	885	78.8 %
	~ ALL PROVIDERS ~	No	3	732	91.3 %
	~ ALL PROVIDERS ~	Yes	40	707	91.6 %
FSP, Transitional		No	3	500	60 %
		Yes	45	249	61.3 %
	~ ALL PROVIDERS ~	No	3	500	60 %
	~ ALL PROVIDERS ~	Yes	45	249	61.3 %
FSP, Adults & Older Adult	3622	No	2	1069	4.5 %
	3622	Yes	20	1401	2.7 %
	3688	No	1	371	75 %
	3688	Yes	32	1118	0 %
	3681	No	28	977	19.1 %
	3681	Yes	209	884	15.4 %
	36D4	No	1	1088	0 %
	36D4	Yes	32	1134	9.9 %
	36DY	No	3	987	18.8 %
	36DY	Yes	69	762	29.9 %
	3811	Yes	1	1162	8.3 %
	~ ALL PROVIDERS ~	No	35	969	18.2 %
	~ ALL PROVIDERS ~	Yes	373	945	13.9 %
FSP, WRAP	36CH	Yes	114	813	18.6 %
	36D4	Yes	44	636	1.4 %
	~ ALL PROVIDERS ~	Yes	158	763	14.6 %

9. View the report in print preview. If formatted following the directions listed previously, the report will resemble the example displayed in this slide. Adjust the orientation and margins for printing as desired.

Using Microsoft Excel to Analyze FSP Data

Using Excel for Analysis

- Analyze one CSV file at a time
- Use formulas to create new fields
- Use Pivot Tables to aggregate data
- Has many limitations

A limited amount of analysis can be performed in Microsoft Excel alone. A single CSV file can be imported, and Microsoft Excel's pivot table can aggregate and summarize the information. While Microsoft Excel does not have the functionality to create report templates from the information in multiple CSV files, Microsoft Excel can calculate the length in program, number of 3Ms due and completed, and percent of 3Ms complete for all partners in a file. However, since the following analysis is from the 3M CSV file, a partner must have had at least one 3M completed to exist in the file and be included in this analysis. Partners without 3Ms would need to be identified separately from the PAF file.

Using Excel for Analysis

- Open 3M file in Excel
- Create new fields

BR	BS	BT	BU	BV	BW	BX	BY	BZ
AssessmentType	Age_Group	AssessmentSource	CreatedDate	QtrlyCntyUse1	QtrlyCntyUse2	QtrlyCntyUse3	DaysInService	3MsDue
3M	11	1	5/27/2010 13:34				429	4
3M	11	1	9/13/2010 11:27				429	4
3M	11	1	9/13/2010 11:21				429	4
3M	11	1	10/11/2010 13:48				429	4
3M	2	1	8/4/2010 10:05				208	2
3M	2	1	7/28/2010 7:56				208	2
3M	11	1	8/9/2011 13:37				462	5
3M	8	1	9/10/2010 7:47				192	2

1. Open the DCR 3M CSV file in Microsoft Excel.

2. As seen in this slide, select the first empty column of the spreadsheet (e.g., BY) and create a new heading called **DaysInService**. In the cell below the heading, type in a formula to calculate the number of days in service to the end date. Since Microsoft Excel uses cell locations and not field names to perform calculations, the formula appears below with field definitions and then as an actual example formula used in Microsoft Excel. The formula first identifies if the partnership status is 0, signifying the partnership has ended, and in this case calculates the days in service by subtracting the partnership date from the date the partnership ended. Then in the cases in which the partnership has not ended, the days in service are calculated by subtracting partnership date from the end date defined when the CSV file was downloaded from the DCR.

Formula Definition: **=IF([PartnershipStatus]=0, [DatePartnershipStatusChange]-[PartnershipDate], "Date of Download"- [PartnershipDate])**

Formula Example: **=IF(U2=0,T2-G2,"10/6/2011"-G2)**

3. As seen in this slide, copy and paste the formula down all of the rows of data.

4. As seen in this slide, select the next empty column of the spreadsheet (e.g., BZ) and create a new heading called 3Ms Due. In the cell below the heading, type the formula below to calculate the approximate amount of 3Ms due. The following formula divides the

number of days in service by the number of days in a quarter ($365.25/4$ = the number of days in a quarter) and returns the integer (INT) of completed quarters in service.

Formula Definition: **=INT([DaysInService]/(365.25/4))**

Formula Example: **=INT(BY2/(365.25/4))**

Using Excel for Analysis

- Insert Pivot Table on new worksheet

The screenshot shows an Excel spreadsheet with a PivotTable and the PivotTable Field List task pane. The PivotTable is located in the range B4:D24. The PivotTable Field List task pane is on the right side of the screen.

Age_Group	Average of DaysInService	Average of 3MsDue	Count of AssessmentDate
000332a0-b752-43e2-a284-8dcd60c3e6cb	429	4	4
000d82a2-0ffc-40f0-8c4a-8cfe8208cbb2	208	2	2
0013afb6-53e5-4721-8e26-9a8b32c4cc10	462	5	1
001e3d28-57af-4a26-9005-8a4ae57d72f2	192	2	2
003acbd3-c8b5-4a48-b2a3-bf045da5b16f	709	7	7
0048ae1d-8465-4654-9e6f-7e344a96c7a	529	5	3
00507b13-c3f0-449d-9fa8-f89cde3396	566	6	2
006bc32b-8e0a-4182-b6ed-b2beb3c45ccd	457	5	5
0070bca7-f8cb-4389-a60c-de36f65d37d	104	1	1
00898385-e00e-4fbf-b466-721c4c4eebd0	434	4	5
0090e52a-14ab-4e50-9d1f-57c2a410ab36	2947	32	13
009a3dcf-9822-4b8e-9dd9-e25e8e661076	132	1	1
00ac7348-8649-40d1-adb4-d7113a159eda	507	5	4
00aec7d1-c001-488a-b5b4-fd864bc7793d	110	1	1
00b03517-1daf-4741-aaa7-4d3765c46da6	717	7	7
00c25fa8-1eaf-43d7-8576-881e6ebc72cd	450	4	4
00c7fcea-307e-4f0f-9d5f-2898e3387629	248	2	1
00c8faed-65df-4f93-8915-15f1b7a73a19	3009	32	6
00d6e6df-ed59-4d78-a7a6-f96e105b0f1a	132	1	2
00dc0a1b-909b-448c-9591-c24831ef401	1139	12	10
00dde551-f9bb-4bf9-bf8e-f3ce6dfa863d	187	2	1

The PivotTable Field List task pane shows the following configuration:

- Report Filter:** Age_Group
- Row Labels:** GlobalID
- Values:**
 - Average of DaysInService
 - Average of 3MsDue
 - Count of AssessmentDate

5. Select anywhere within the data in the spreadsheet and choose to insert a pivot table into a new worksheet by selecting **Insert > Pivot Table** from the menus. The data selection will expand to the entire table of data within the spreadsheet.

6. This step will summarize the number of 3Ms completed and 3Ms due for each partner. Add the field **[Age_Group]** to the **Report Filter** box. Add the field **[GlobalID]** to the **Row Labels** box. Add the **[DaysInService]** to the **Values** box and change the **Value Field** setting to **Average**. Add the **[3MsDue]** to the **Values** box and change the **Value Field** setting to **Average**. Add the **[AssessmentDate]** to the **Values** box and change the **Value Field** setting to **Count**.

Using Excel for Analysis

- Calculate Percent of 3Ms Complete by Individual

A	B	C	D	E
Age_Group	(All)			
Row Labels	Average of DaysInService	Average of 3MsDue	Count of AssessmentDate	Percent of 3Ms Complete
020ce66b-ae1-481e-b9aa-cc:	317	3	1	=INT(100*D4/C4)
0226f76d-3169-421b-b31b-bft	143	1	1	100
02311209-29bd-48cc-a5dd-35e	200	2	2	100
023f178d-9e28-4f4c-ac81-be4	114	1	1	100
02417723-e442-470b-a740-4b6	1204	13	12	92
024f8841-8e95-4be0-8ea8-221	498	5	3	60
025e870c-92e0-402d-ab79-65f	236	2	2	100
025ffa36-735d-4058-8959-7f2e	1380	15	15	100
028ad70f-f363-4e72-94a5-206	442	4	4	100
02984f79-94c6-4e62-bcb6-0be	462	5	3	60
02a8c9f9-caea-4686-a280-a3fc	377	4	3	75
02be468d-3661-4c18-b2f0-0c4	1218	13	8	61

7. To calculate the individual percent of 3Ms completed by partner, divide the value in column D by the value in column C for each partner, multiply by 100 and take the integer. As seen in this slide, select cell E4 and type the following formula: =INT(100*D4/C4). Select Enter to exit the cell, and then copy the formula down column E to the end of the dataset.

Using Excel for Analysis

- Calculate Percent of 3Ms Complete for All

A	INT(number)	C	D	E
Age_Group	(All)			
Row Labels	Average of DaysInService	Average of 3MsDue	Count of AssessmentDate	Percent of 3Ms Complete
ff5c56b4-e30b-4416-b226-225	163	1	1	100
ff645f72-7a5e-49de-8c0c-0255	118	1	1	100
ff77e397-e87f-4222-a22a-91b7	567	6	2	33
ff7884ca-911c-4d51-bbb6-3b7	3289	36	12	33
ff811de7-0d75-4397-866a-421	279	3	2	66
ff822cc2-1260-4ef7-82d6-5737	237	2	2	100
ff89dd28-5e0e-41d5-9e69-4ft	309	3	3	100
ff8af1b4-47e3-437d-93d8-3a4	604	6	4	66
ff916a06-843b-4227-bf1c-a765	250	2	2	100
ffcb59ce-d4ad-471b-be9a-73e	342	3	3	100
ffddbaff-9dc3-4604-a0d5-4d5f	345	3	3	100
ffed743c-a991-410c-b677-6ad	203	2	2	100
ffede3c0-1001-4b10-98b8-b2e	99	1	1	100
Grand Total	1037.609206	10.85669125	20878	
		26936	20878	=INT(100*D4644/C4644)

8. To calculate the total percent of 3Ms completed for all partners, sum all of the values in column D and divide by the sum of values in column C. As seen in this slide, the end of the data in column C, type the formula =sum(C4:C#), where # is the row number for the last partner in the pivot table. At the end of the data in column D, type the formula =sum(D4:D#), where # is the row number for the last partner in the pivot table. In the same row at column E, type in the formula =int(100*D#/C#), where # where the previous formulas were entered.

User Resources

- **Getting data in** – Users have the following resources:
 - FPS DCR Administrator and User Training Curriculum (completed 3/12/2012)
 - FSP DCR Forms
 - FSP DCR Data Dictionary (completed 9/15/2011)
 - FSP DCR User Manual (completed 1/17/2012)
- **Getting data out** – Users have the following resources:
 - FPS DCR Data Analysis Training Curriculum (completed 4/20/2012)
 - FSP DCR User Manual (completed 1/17/2012) – Data Extraction Instructions
 - FSP DCR PLD Templates (completed 1/19/2012)
 - FSP DCR Application Notes (completed 4/5/2012)

This FSP DCR Data Analysis Training Curriculum covered the data extraction instructions in the FSP DCR User Manual (completed 1/17/2012), and the training provided instruction for utilizing the FSP DCR PLD Templates and User Manual (completed 1/19/2012) to view a summary of a partner's data. The training also reviewed the FSP DCR Application Notes (completed 4/5/2012) which provide instruction for creating specific reports from the DCR CSV data extraction files.

There are additional resources covering aspects of extracting and analyzing the FSP DCR data. The FSP DCR Administrator and User Training Curriculum provides an overview of the FSP DCR Forms, FSP DCR Data Dictionary (completed 9/15/2011) and FSP DCR User Manual (completed 1/17/2012) . The FSP DCR Administrator and User Training Curriculum is available for download as a PowerPoint presentation and a handout with presenter's notes. Trainers can use this curriculum to provide training internally to new staff using the FSP DCR.

FSP Data Analysis Training

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