FSP DCR Training for Users

This training was funded by the MHSOAC.
Training Overview

1. FSP Assessment Forms
2. FSP DCR Data Dictionary
3. FSP DCR User Manual for Users
Reference Materials

- FSP DCR Data Dictionary (9/15/2011)
## Reference Materials

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

### Table of Reference Materials

<table>
<thead>
<tr>
<th>Title</th>
<th>Last Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Importing XML into an Access Database</td>
<td>06/18/07</td>
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<tr>
<td>DCR Client Level Report Template</td>
<td>02/16/12</td>
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<tr>
<td>DCR User Manual</td>
<td>02/16/12</td>
</tr>
<tr>
<td>March 8th Webcast CSI.pdf</td>
<td>03/07/06</td>
</tr>
<tr>
<td>March 8th Webcast FSP.ppt</td>
<td>03/07/06</td>
</tr>
<tr>
<td>March 8th Webcast FSP handouts.pdf</td>
<td>03/07/06</td>
</tr>
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</table>
FSP Assessment Forms
This Section Covers:

- FSP Data Collection Forms
- FSP Age Groups
- FSP Outcome Domains
- FSP DCR Data Hierarchy
- Data Collection Example
FSP Data Collection Forms

- FSP data collected on assessment forms:
  - Partnership Assessment Form (PAF)
    - A history of the partner
    - Current status of the partner
  - Quarterly Assessment Form (3M)
    - Collection of current partner status every 3 months
  - Key Event Tracking Form (KET)
    - Tracks the dates of major events (e.g., arrests, graduation)
<table>
<thead>
<tr>
<th>PARTNERSHIP INFORMATION</th>
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<tr>
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<tr>
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<tr>
<td>Partnership Date (mm/dd/yyyy)</td>
<td></td>
</tr>
<tr>
<td>Partner's Date of Birth (mm/dd/yyyy)</td>
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<tr>
<td>Who referred the partner? (mark one)</td>
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<tr>
<td>☐ Self</td>
<td>☐ Emergency Room</td>
</tr>
<tr>
<td>☐ Family Member (e.g., parent, guardian, sibling, aunt, uncle, grandparent)</td>
<td>☐ Mental Health Facility / Community Agency</td>
</tr>
<tr>
<td>☐ Significant Other (e.g., boyfriend / girlfriend, spouse)</td>
<td>☐ Social Services Agency</td>
</tr>
<tr>
<td>☐ Friend / Neighbor (i.e., unrelated other)</td>
<td>☐ Substance Abuse Treatment Facility / Agency</td>
</tr>
<tr>
<td>☐ School</td>
<td>☐ Faith-based Organization</td>
</tr>
<tr>
<td>☐ Primary Care / Medical Office</td>
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<table>
<thead>
<tr>
<th>ADMINISTRATIVE INFORMATION</th>
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<tr>
<td>PARTNERSHIP STATUS</td>
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<td>Full Service Partnership Program ID</td>
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<tr>
<td>Partnership Service Coordinator ID</td>
<td></td>
</tr>
</tbody>
</table>
Age Groups

- Separate forms exist for each age group:
  - Child / Youth (Ages 0-15)
  - Transition Age Youth (Ages 16-25)
  - Adults (Ages 26-59)
  - Older Adults (60+)
## Outcome Domains

<table>
<thead>
<tr>
<th>Domain</th>
<th>Type</th>
<th>Is Past History Collected on PAF?</th>
<th>Collected On</th>
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<tbody>
<tr>
<td>Residential</td>
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<td>PAF &amp; KET</td>
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<tr>
<td>Education</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>School Enrollment and Graduation/Completion Dates</td>
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<tr>
<td>Grades, Attendance and Special Education Assistance</td>
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<td>PAF &amp; 3M</td>
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<td>Employment</td>
<td>A</td>
<td>Yes</td>
<td>PAF &amp; KET</td>
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<tr>
<td>Financial Support</td>
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<td>PAF &amp; 3M</td>
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<tr>
<td>Legal Issues / Designations</td>
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<td>Partner’s Legal Issues</td>
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<tr>
<td>Legal Designation of Partner’s Dependents</td>
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<tr>
<td>Emergency Interventions</td>
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<td>Health Status</td>
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<tr>
<td>IADL-older adult only</td>
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<td>PAF &amp; 3M</td>
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</tbody>
</table>

- Type A – Collected on PAF & KET
- Type B – Collected on PAF and 3M
Data Collection Example

KET Collected Domains
- Emergency Interventions
- Legal Issues (Arrests, Probation, etc.)
- Employment
- Education (Enrollment / Graduation)
- Residential

Timeline
- Quarter in FSP Program
- Start Date (7/1/2009)
- End Date (10/1/2010)

3M Collected Domains
- Education (Grades / Attendance)
- Financial Support
- Legal Issues (Partner's Dependents)
- Health Status
- Substance Abuse
- ADL (older adult only)
- IADL (older adult only)

Quarter 1: 1st 3M to 10/1/2009
Quarter 2: 2nd 3M to 1/1/2010
Quarter 3: 3rd 3M to 4/1/2010
Quarter 4: 4th 3M to 7/1/2010
Quarter 5: 5th 3M to 10/1/2010
FSP DCR Data Dictionary
This Section Covers:

- Data Dictionary Overview
- Complete Variable Index
- Assessment Form Crosswalks
- Data Field Definitions
Data Dictionary Overview

- Three main elements:
  1. Complete Variable Index (CVI)
     - Table of all fields, organized by domain
  2. Crosswalk between form fields and variable names
     - Annotated forms with data variable numbers
  3. Variable definitions
     - Field types, sizes and permissible values
# Complete Variable Index (CVI)

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<tr>
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# Child/Youth PAF Crosswalk

## Partnership Information

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<td>Partner's Last Name</td>
<td>3.05</td>
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<tr>
<td>Partnership Date (mm/dd/yyyy)</td>
<td>3.06</td>
</tr>
<tr>
<td>Partner's Date of Birth (mm/dd/yyyy)</td>
<td>3.07</td>
</tr>
</tbody>
</table>

**Partner's Date of Birth** automatically generated at time form is filled out.

## Who referred the partner? (mark one)

- Self
- Family Member (e.g., parent, guardian, sibling, aunt, uncle, grandparent)
- Significant Other (e.g., boyfriend / girlfriend, spouse)
- Friend / Neighbor (i.e., unrelated other)
- School
- Primary Care / Medical Office
- Emergency Room
- Mental Health Facility / Community Agency
- Social Services Agency
- Substance Abuse Treatment Facility / Agency
- Faith-based Organization
- Other County / Community Agency
- Homeless Shelter
- Street Outreach
- Juvenile Hall / Camp / Ranch / Division of Juvenile Justice
- Acute Psychiatric / State Hospital
- Other

## Administrative Information

<table>
<thead>
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<th>Field</th>
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</tr>
<tr>
<td>Partnership Service Coordinator ID</td>
<td>4.06</td>
</tr>
</tbody>
</table>
Data Field/Variable Definitions

- Provides definition of variable name, form question, and permissible values

Example:

**EMPLOYMENT VARIABLES**

**7.07  Past12_Transitional**

EMPLOYMENT: Transitional Employment / Enclave: Paid jobs in the community that are 1) open only to individuals with the disability AND 2) are either time-limited for the purpose of moving to a more permanent job OR are part of a group of disabled individuals who are working as a team in the midst of teams of non-disabled individuals who are performing the same work;

<table>
<thead>
<tr>
<th>On Form</th>
<th>Age Group</th>
<th>Data Type</th>
<th>Format</th>
<th>Length</th>
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<tr>
<td>PAF</td>
<td>Child, TAY, Adult, Older Adult</td>
<td>Number</td>
<td>XX</td>
<td>2</td>
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</tbody>
</table>

**Comments**
Number of weeks the partner was in this employment setting DURING THE PAST 12 MONTHS;

**Valid Codes**
0-52
FSP DCR User Manual for Users
This Section Covers:

- Introduction to the FSP DCR
- Online System Interface
- Establishing Partners
- Working with KETs
- Working with 3Ms
- Managing Partners
- Data Correction
Introduction to the FSP DCR

- Tracks Partnership Outcomes

- Partners associated with one:
  - Program
  - Partnership Service Coordinator (PSC)
  - Provider (optional)

- Partner Demographics:
  - Name & Date of Birth
  - CSI number links all other demographics from CSI database
Introduction to the FSP DCR

- **Categories of Data:**
  1. General Partnership Information & Administrative Data Fields
  2. Internally Generated Fields
  3. CSI-linked Fields
  4. Partner’s History Fields (collected only on PAF)
  5. Domain Type A Fields (collected on PAF & KET)
  6. Domain Type B Fields (collected on PAF & 3M)
Introduction to the FSP DCR

- General Partnership Info. & Admin. Fields:
  - County*
  - Partner’s FSP Program ID *
  - Partner’s Partnership Service Coordinator (PSC) ID *
  - Partner’s First Name and Last Name *
  - Partnership Date *
  - Partner’s Date of Birth *
  - CSI County Client Number (CCN)
  - County Partner ID
  - Provider Number / NPI
  - Who Referred the Partner
  - Other Programs (FORMER AB2034, GHI, MHSA)
Introduction to the FSP DCR

- Data quality rules designed to prevent incorrect data

- PAF completion status alerts when missing PAF data
  - Validation reports identify missing data pieces

- Notification lists alert users for
  - 3Ms due
  - Partners in temporary residence >30 days
Introduction to the FSP DCR

- Online web interface
- ITWS secure data submission and extraction
The Online System Interface

Topics

- ITWS System Requirements
- Adding the ITWS website as a Trusted Site
- Configuring Pop-up Blocker
- Enabling Cookies in Internet Explorer
- Navigating to the ITWS website
- ITWS What’s New
- ITWS Utilities Menu
- ITWS Support Menu
- MHSA Information Menu
- Accessing the FSP DCR Application
- Using the DCR Interface
- DCR Menu Options
ITWS System Requirements

1. Microsoft Windows Operating System using Internet Explorer version 6 or later
2. Minimum 1024 x 768 recommended resolution
3. The ITWS system should be added as a Trusted Site
4. Pop-ups must be allowed for the ITWS system
5. Cookies must be enabled for the ITWS website in Internet Explorer
Adding the ITWS website as a Trusted Site

- Enter the ITWS website, https://mhhitws.cahwnet.gov/ as a Trusted Site in you browser Internet Options menu.
Configuring Pop-up Blocker

- Enter the ITWS website, [https://mhhitws.cahwnet.gov/](https://mhhitws.cahwnet.gov/) as a site to allow pop-ups through your browsers

Internet Options menu
Enabling Cookies in Internet Explorer

- Error Messages When Cookies Are Disabled:
  - Access to ITWS is denied
  - Cookies must be enabled
  - Please login before trying to enter ITWS

- Go to browser’s Internet Options and go to the Privacy tab and enter ITWS website
Navigating to the ITWS website

1. Navigate directly:  https://mhhitws.cahwnet.gov/

2. Navigate to www.dmh.ca.gov and select Providers & Partners tab and then the ITWS link.
ITWS What’s New

California Department of Mental Health
Information Technology Web Services (ITWS)

What's New

UPDATED ITWS Maintenance Schedule

Created: 3/4/2009 3:06:00 PM  Last Updated: 9/6/2011 11:24:00 AM

The Department of Mental Health will be performing System Maintenance on the ITWS Production Servers on Tuesday, September 20, 2011, between 6:00 p.m. and 10:00 p.m. During this time, ITWS services will be intermittently unavailable.

We encourage everyone to read the Pre-Enrollment Guide and get familiar with the ITWS enrollment process, for users and approvers.

Quick Links

- Pre-Enrollment guide
- DMH Approver certification forms
- ADP Approver certification forms
- System enrollment guides
- Contact ITWS (DMH & ADP)
- ITWS QA web site
- Check enrollment status
- Related links
- User computer requirements
- DMH-IT mission

This site is best viewed with Internet Explorer version 5.5 and above.
© 2004 California Department of Mental Health, Information Technology

For Security Information, click on the padlock
ITWS Utilities Menu

- ITWS Utilities Menu Options:
  - Change Password
  - User Preferences
  - User Profile
  - Request Additional Membership
  - Approver Management
ITWS Support Menu

- ITWS Support Menu Options
  - Comment Form
  - Contact ITWS
  - Online Technical Support
  - Message History
MHSA Information Menu

1.

2.
Accessing the FSP DCR Application

- Click on **Functions** menu and select the **DCR Application**
Using the DCR Interface

Department of Mental Health
MHSA Data Collection and Reporting

Search for
Last Name

System Messages

Pending Partnership Assessment Form(s)

30 Day Key Event Notification(s)

Quarterly Assessment(s) Due

View All

View All

View All

View All
DCR Menu Options

- FSP DCR System Main Menu Options:
  - Home
  - Partnerships
  - Transfers
  - Admin
  - Help
DCR Sub-Menu Options

- Add New Partner (PAF)
- Manage Active Partners
- Inactive Partners

Download FSP Data Files

Forms - Printer Friendly
View/Share FSP Groups
System Messages
Virtual PSCs

Training
Contact Us
Support

POQI.Support@dmh.ca.gov.
Establishing Partners

**Methods to Collect PAF Information from Partner at Intake:**

1. Print PAF forms and fill out answers with pen/pencil
2. Fill in PAF form fields through the online FSP DCR application
3. Enter data into another application to later be uploaded to the FSP DCR via XML batch submission
PAF through Printed Forms

OR

http://www.dmh.ca.gov/POQI/Full_Service_Forms.asp
PAF through the Online FSP DCR

- Partnerships > Add New Partner (PAF)
- Enter date of partnership and select Get Form
The Online PAF Form

- Fill in Partnership Information domain on form
The Online PAF Form

- Some Administrative Information fields are required or link to other databases
Online PAF Validation Report

- The **Validation Report** link only appears after selecting **Submit** and then **Cancel**
Online PAF Stored

- PAF stored successfully
PAF through XML Batch

- Use 3rd party application to store FSP data
- Export PAF records as XML and upload to DCR
Working with KETs

- Methods to Collect KET Information from Partner at Intake:
  1. Print KET forms and fill out answers with pen/pencil
  2. Fill in KET form fields through the online FSP DCR application
  3. Enter data into another application to later be uploaded to the FSP DCR via XML batch submission
KET through Printed Forms

<table>
<thead>
<tr>
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<th>Partnerships</th>
<th>Transfers</th>
<th>Admin</th>
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<td>Forms - Printer Friendly</td>
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<td>View/Share FSP Groups</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Virtual PSCs</td>
<td></td>
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</tbody>
</table>

OR

http://www.dmh.ca.gov/POQI/Full_Service_Forms.asp
KET through Online FSP DCR

- Partnerships > Manage Active Partners
The Online KET Form

- Enter **Date Completed** and select **Get Form**
The Online KET Form

- Fill in KET domain information on form
KET through XML Batch

- Use 3rd party application to store FSP data
- Export KET records as XML and upload to DCR
Working with 3Ms

- Methods to Collect 3Ms Information from Partner at Intake:
  1. Print 3M forms and fill out answers with pen/pencil
  2. Fill in 3M form fields through the online FSP DCR application
  3. Enter data into another application to later be uploaded to the FSP DCR via XML batch submission
3M through Printed Forms

OR

http://www.dmh.ca.gov/POQI/Full_Service_Forms.asp
3M through Online FSP DCR

- Performed from Partnerships > Manage Active Partners
The Online 3M Form

- Enter **Date Completed** and select **Get Form**
The Online 3M Form

- Fill in domain information on the form

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**Department of Mental Health**
**MHSA Data Collection and Reporting**

**FULL SERVICE PARTNERSHIP**
Child / Youth Quarterly Assessment Form
FOR AGES 0-15 YEARS

<table>
<thead>
<tr>
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<th>County 59</th>
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<tr>
<td>County Partner ID (optional)</td>
<td>564581104575664A</td>
</tr>
<tr>
<td>Partner's First Name</td>
<td>Jenny</td>
</tr>
<tr>
<td>Partner's Last Name</td>
<td>Jenny</td>
</tr>
<tr>
<td>Date Completed (mm/dd/yyyy)</td>
<td>9/22/2011</td>
</tr>
<tr>
<td>Partner's Date of Birth (mm/dd/yyyy)</td>
<td>05/05/1999</td>
</tr>
</tbody>
</table>

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**EDUCATION**
**SOURCES OF FINANCIAL SUPPORT**
**LEGAL ISSUES / DESIGNATIONS**
**HEALTH STATUS**
**SUBSTANCE ABUSE**
**COUNTY USE QUESTIONS**

**Submit**  **Cancel**  **Print**
3M through XML Batch

- Use 3rd party application to store FSP data
- Export 3M records as XML and upload to DCR
Managing Partners Online

Areas of the FSP DCR with Links to a Partner’s Information:

1. **Home** menu and **DCR Home** submenu webpage
   - Pending Partnership Assessment Form(s) Table
   - 30 Day Key Event Notification(s) Table
   - Quarterly Assessment(s) Due Table

2. **Search for** box results webpage
   - For Active Partners
   - For Inactive Partner

3. **Partnerships** menu and **Manage Active Partners** submenu webpage
   - Active Full Service Partners with Pending & Complete Status Table
   - Active Full Service Partners with Deleted Status Table
   - Active Full Service Partners with All Status Table

4. **Partnerships** menu and **Inactive Partners** submenu webpage
Home Notification Tables

- Pending Partnership Assessment Form(s) Table
- 30 Day Key Event Notification(s) Table
- Quarterly Assessment(s) Due Table
Pending Partnership Assessment Form(s)

- Displays partnerships with incomplete PAF information
- “Pending” PAF Status
30 Day Key Event Notification(s)

FSP DCR Temporary Residential Settings:

1. Emergency Shelter
2. Homeless
3. Medical Hospital
4. Psychiatric Hospital
5. State Psychiatric
6. Juvenile Hall / Camp
7. Department of Juvenile Justice (DJJ)
Quarterly Assessment(s) Due Table

- Displays partnerships 3M due (-15 to +30 days of due date)
Searching for Active Partners

- Enter Last Name or CCN/FSP ID
Searching for Inactive Partners

- Enter Last Name or CCN/FSP ID
Managing Active Partners

- Summarizes all PAF, KET and 3Ms for partnership
Managing Active Partners

Actions Performed from the ACTIVE Full Service Partners Webpage:

1. Print PAF Validation Report
2. Certify a PAF is Complete
3. Review / Correct / Update PAF Information
4. Review / Correct / Update KET Information
5. Review / Correct / Update 3M Information
6. Add a New KET
7. Complete the 3M Currently Due
8. Complete a Missing 3M
9. Discontinue a Partner
10. Delete a Partner
Certifying a PAF as Complete

- Partnerships > Manage Active Partners
- Select “Pending” PAF status link
Decertifying a PAF

- Partnerships > Manage Active Partners menu
- Select partner & select Decertify
Managing Inactive Partners

- Partnerships > Inactive Partners menu
- Select partner to reveal summary table below
Managing Inactive Partners

- Actions Performed from the INACTIVE Full Service Partners Webpage:
  1. Print PAF Validation Report
  2. Review / Correct / Update PAF Information
  3. Review all KET Information / Correct some KET information
  4. Review / Correct / Update 3M Information
  5. Complete a Missing 3M
  6. Reactivate a Partner
Deleting, Discontinuing, Reactivating

• **Delete Partnership** –
  ◦ To remove partnership created in error
  ◦ To replace partnership with false information

• **Discontinue Partnership** –
  ◦ To record date when partners stop participating in FSP
  ◦ To halt the collection of 3Ms and KETs

• **Reactivate Partnership** –
  ◦ To record the date when partner begins participating in FSP after a lapse of participation
  ◦ To reinstate collection of future 3Ms and historic/future KETs (if partner lapse < 1 year)
  ◦ To collect new PAF information and future 3Ms and KETs (if partner lapse >= 1 year)
Deleting a Partnership

- Performed from original PAF
Discontinuing a Partnership

- Performed in new KET
Reactivating a Partnership

- Performed from Inactive Full Service Partners webpage
Sharing Partner Information

- Performed from Admin Menu
- User must have SFG role
- Can share partners with another DCR group
- Sharing is specific to an individual partner
Data Correction

- Correct, Update and Delete a PAF Online
- Correct, Update and Delete a KET Online
- Correct, Update and Delete a 3M Online
- Correct Data through XML Batch Upload
- Understand Business Rules for Data Correction
Correcting PAF with the Online DCR

- Return to original PAF and make corrections
Correcting KET with the Online DCR

- Return to existing KET form under KET History
- KETs with a discontinuation cannot be altered
Correcting 3M with the Online DCR

- Return to 3M form under Quarterly Assessments
Correcting Data by XML Batch

Update by overwriting existing information on:
- PAF records
- KET** records
- 3M records

A KET** with a partnership status change cannot be overwritten
Business Rules for Data Correction

- **PAFs:**
  - Can be updated for active or inactive partners
  - Can be deleted, which will delete the entire partnership
  - Partnership date cannot be updated
  - Changes to most partnership info. & admin fields will perpetuate across KETs & 3Ms
  - Date of birth should be updated with caution
Business Rules for Data Correction

- All KETs:
  - Existing KETs cannot be deleted
  - New KETs can be added for active partners
  - New KETs cannot be added for inactive partners (except for reactivation)

- Existing KETs without deactivation/reactivation:
  - Can be updated for active or inactive partners

- Existing KETs with deactivation/reactivation:
  - Cannot be updated or altered
  - In the case of incorrect deactivation or reactivation, the partnership must be deleted and recreated with the correct information
Business Rules for Data Correction

- 3Ms
  - Cannot be deleted
  - Can be updated for active or inactive partners

- In the case that 3Ms exist outside of allowable range:
  - These cannot be deleted
  - The partnership must be deleted and recreated
User Resources

- **Getting data in** – Users have the following resources:
  - FPS DCR Administrator and User Training Curriculum
  - FSP DCR Forms
  - FSP DCR Data Dictionary (9/15/2011)
  - FSP DCR User Manual (1/17/2012)

- **Getting data out** – Users have the following resources:
  - FPS DCR Data Analysis Training Curriculum
  - FSP DCR User Manual – Data Extraction Instructions
  - FSP DCR Partner-Level Templates
  - FSP DCR Application Notes