

# 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

# Reference Materials

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

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



# Reference Materials

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

Department of Mental Health Department of Mental Health Department of Mental Health Home Systems MHSA Information Functions Utilities Support Logout Department of Mental Health Department of Mental Health Department of Mental Health Department of Mental Health

**MHSA**

**Instructions**

**Training for the**

Currently, the DMH Performance Outcomes and Quality Improvement Partnership (FSP) Outcomes Assessment data. County staff will not be able to use the system and submit data until they are 'certified' as having received the training for more information.

**Outcomes Assessment**

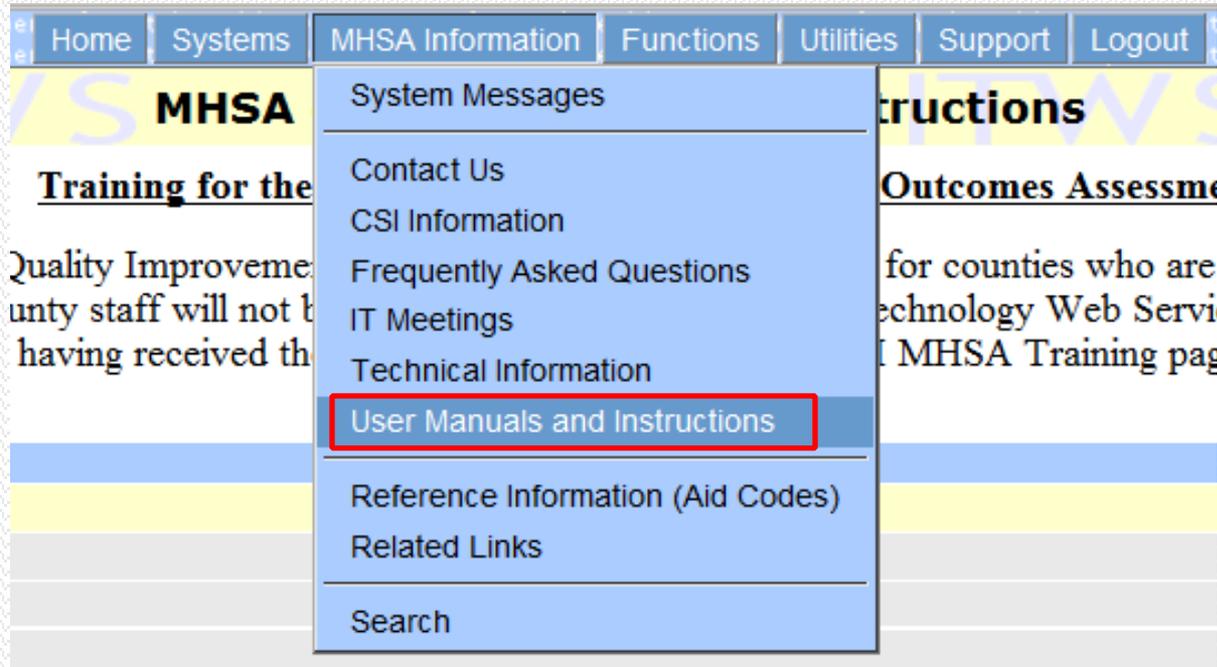
for counties who are preparing to collect and submit Full Service Technology Web Services (ITWS) Mental Health Services Act (MHSA) data. For more information on the MHSA Training page at <http://www.dmh.ca.gov/POQI/trainingMHSA.asp>

**User Manuals and Instructions**

Title	Last Updated
Instructions	
<a href="#">Importing XML into an Access Database</a>	06/18/07
<a href="#">DCR Client-Level Report Template</a>	02/16/12
<a href="#">DCR User Manual</a>	02/16/12
<b>CIHM Webcast Training: New Reporting Requirements for DIG/MHSA</b>	
<a href="#">March_8th_Webcast_CSI.ppt</a>	03/07/06
<a href="#">March_8th_Webcast_FSP.ppt</a>	03/07/06
<a href="#">March_8th_Webcast_FSP_handouts.pdf</a>	03/07/06

# Reference Materials

- Application Notes (completed 4/5/2012)



# Downloading FSP Data from the DCR

# This Section Covers:

---

- Downloading FSP Data Files
- CSV Files
- XML Files

# 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

# Download Files

---

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

The screenshot shows the web interface for the Department of Mental Health MHPA Data Collection and Reporting. At the top, the title reads "Department of Mental Health MHPA Data Collection and Reporting". Below the title is a navigation menu with links for "Home", "Partnerships", "Transfers", "Admin", and "Help". The "Transfers" link is highlighted, and a sub-menu is open showing "Download FSP Data Files". On the left side, there is a search section with the text "County: County 59" and a "Search for" field. Below the search field is a "Last Name" dropdown menu and a "Go" button. At the bottom of the search section is a button labeled "Download FSP Data Files". In the main content area, there is a "Data Download" section with a "New Download" button. A large, faint watermark reading "Only" is visible across the bottom right portion of the interface.

# Download Files

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

Department of Mental Health  
MHA Data Collection and Reporting

County: County 59

Home Partnerships Transfers Admin Help

ITWS Home Log out

Search for

Last Name Go

Download FSP Data Files

Data Download

Download Format: CSV Flat File \* Required

Form Type: PAF (Residential information only) \* Required

OPTIONAL

Date Range: 07/01/2008 Through: 06/30/2009  
(Leave blank to get all PAF forms submitted)

Run Cancel

Download Instructions

FSP Data Dictionary – February 2011

Training Only



# XML Data File

---

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

```
DCR_3M_FY0809.xml - Notepad
File Edit Format View Help
<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">
                  <xs:simpleType>
                    <xs:restriction base="xs:string">
                      <xs:maxLength value="9" />
                    </xs:restriction>
                  </xs:simpleType>
                </xs:element>
                <xs:element name="GlobalID" msdata:DataType="System.Guid, mscorlib, version=2.0.0.0, Culture=neutral, PublicKey
```

# 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

# 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

# PLD Templates Overview

- Interface for Importing and Viewing Partner Data

The screenshot shows a web application interface with a title bar labeled "FrontPage" and a main header "FSP DCR Partner-Level Data Templates". The interface is divided into three main sections:

- Browse Partner Data:** Contains four buttons: "Browse All Partners' Data", "Find a Partner's Data - Search by ID", "Find All Partners' Data for a Coordinator", and "Find a Partner's Data - Search by Name".
- Run Partner Report:** Contains two buttons: "View Partner Report - Search by ID" and "Export PDF Report - Search by ID".
- Import New Data Download from DCR .csv Files:** Contains one button: "Instructions".

# 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
-----	---------------	-----------------	---------------	----------------	---------------	-----------	---------------	-------------------------	---------	-----------

# Browse Partner Data Template

- Four Ways to Access the BPD Template

The screenshot shows a web application interface with a title bar that reads "FrontPage" and "FSP DCR Partner-Level Data Templates". The main content area is divided into three columns. The first column, titled "Browse Partner Data", is highlighted with a red border and contains four buttons: "Browse All Partners' Data", "Find a Partner's Data - Search by ID", "Find All Partners' Data for a Coordinator", and "Find a Partner's Data - Search by Name". The second column, titled "Run Partner Report", contains two buttons: "View Partner Report - Search by ID" and "Export PDF Report - Search by ID". The third column, titled "Import New Data Download from DCR .csv Files", contains one button: "Instructions".

FrontPage

## FSP DCR Partner-Level Data Templates

### Browse Partner Data

- Browse All Partners' Data
- Find a Partner's Data - Search by ID
- Find All Partners' Data for a Coordinator
- Find a Partner's Data - Search by Name

### Run Partner Report

- View Partner Report - Search by ID
- Export PDF Report - Search by ID

### Import New Data Download from DCR .csv Files

- Instructions



# Run Partner Report Template

- Two Ways to Access the RPR Template

FrontPage

## FSP DCR Partner-Level Data Templates

### Browse Partner Data

- Browse All Partners' Data
- Find a Partner's Data - Search by ID
- Find All Partners' Data for a Coordinator
- Find a Partner's Data - Search by Name

### Run Partner Report

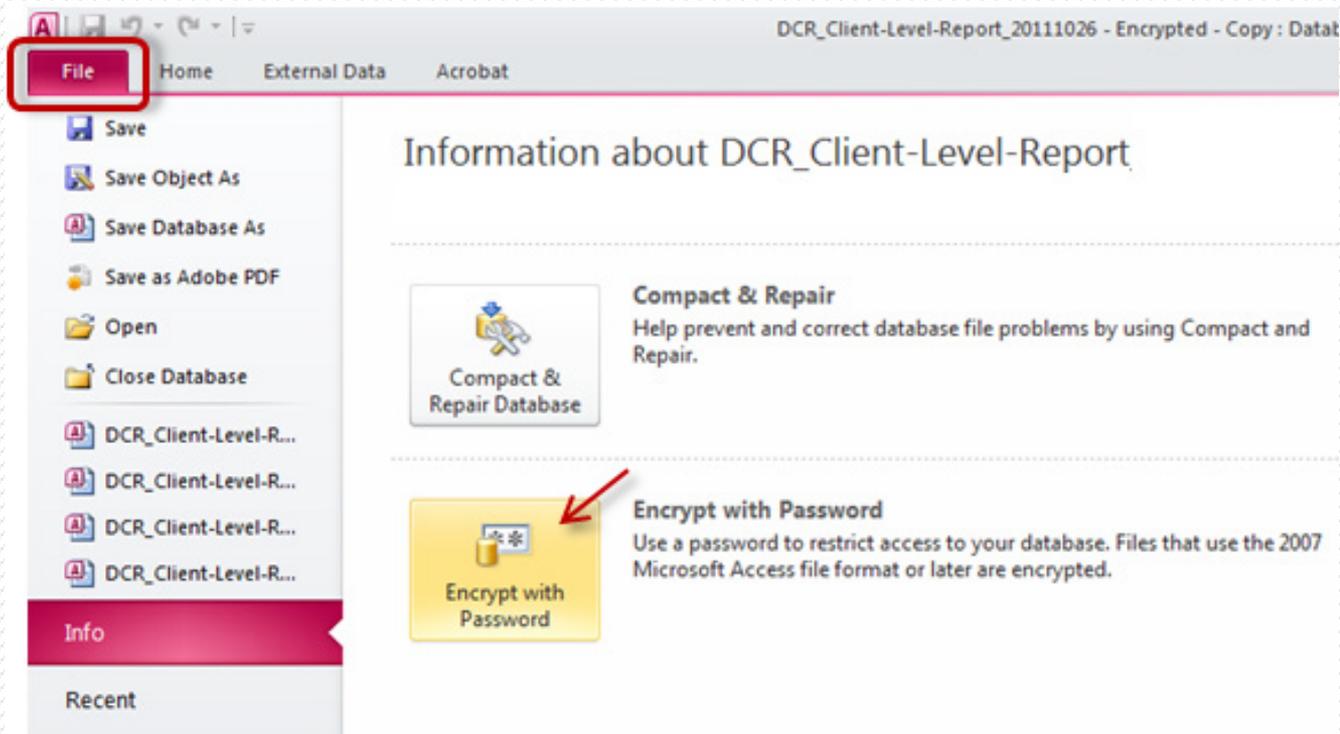
- View Partner Report - Search by ID
- Export PDF Report - Search by ID

### Import New Data Download from DCR .csv Files

- Instructions

# Encryption

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



# Importing New Data Extracts

The screenshot shows a web application interface with a header bar labeled "FrontPage" and a main title "FSP DCR Partner-Level Data Templates". Below the title, there are three main sections:

- Browse Partner Data**: Contains four buttons: "Browse All Partners' Data", "Find a Partner's Data - Search by ID", "Find All Partners' Data for a Coordinator", and "Find a Partner's Data - Search by Name".
- Run Partner Report**: Contains two buttons: "View Partner Report - Search by ID" and "Export PDF Report - Search by ID".
- Import New Data Download from DCR csv Files**: Contains one button labeled "Instructions", which is highlighted with a red border and a red arrow pointing to it.

# Importing New Data Extracts

FrontPage NewData\_Instructions

## Instructions for Importing New Data

These instructions allow users to update the data in this database utilizing the four comma separated values (CSV) data files downloaded from the FSP DCR. The four CSV files required to perform this data import are:

1. PAF Residential
2. PAF Non-residential
3. KET
4. 3M

(Refer to the Chapter 12 of the FSP DCR User Guide for further information regarding downloading the DCR CSV files.)

Before beginning the instructions below, close all open forms, queries and reports, except the FrontPage form.

**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.**

Data Cleared

All of the data is clear from the database.

OK

File Home External Data Acrobat

Save Save Object As

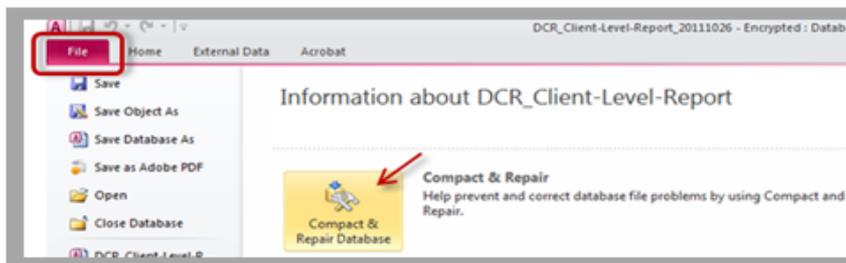
Information about DCR\_Client-Level-Report

# Importing New Data Extracts

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

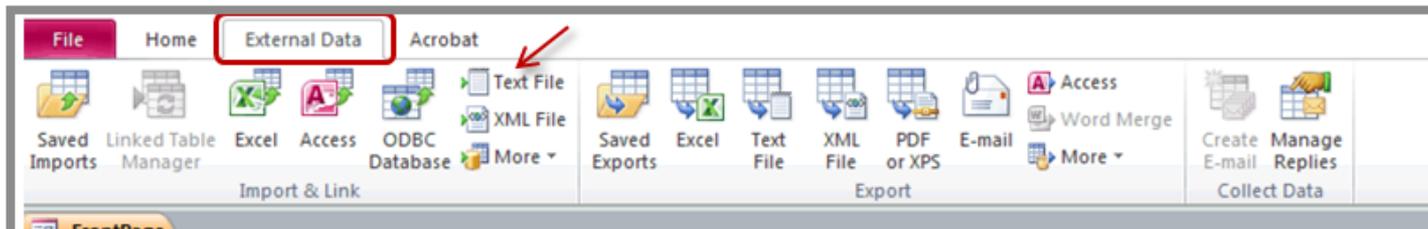
>> Clear Data <<

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



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

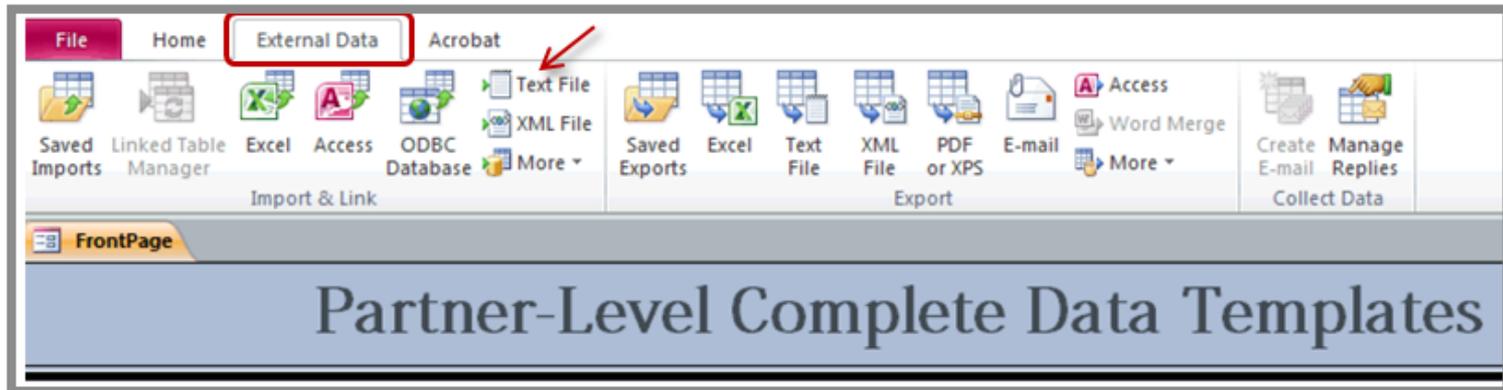
- As seen in the image below, select the External Data tab above and click on the Text File to invoke the import wizard.



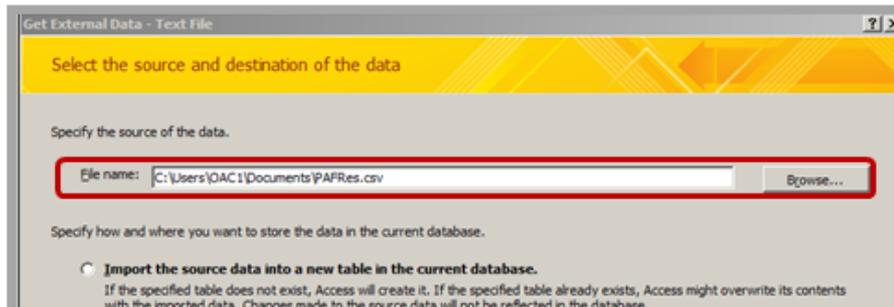
# Importing New Data Extracts

## 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.



- As seen in the image below, select Browse to locate the PAF-Residential file on 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

Get External Data - Text File

Select the source and destination of the data

Specify the source of the data.

File name: C:\Users\OAC1\Documents\PAFRes.csv Browse...

Specify how and where you want to store the data in the current database.

Import the source data into a new table in the current database.  
If the specified table does not exist, Access will create it. If the specified table already exists, Access might overwrite its contents with the imported data. Changes made to the source data will not be reflected in the database.

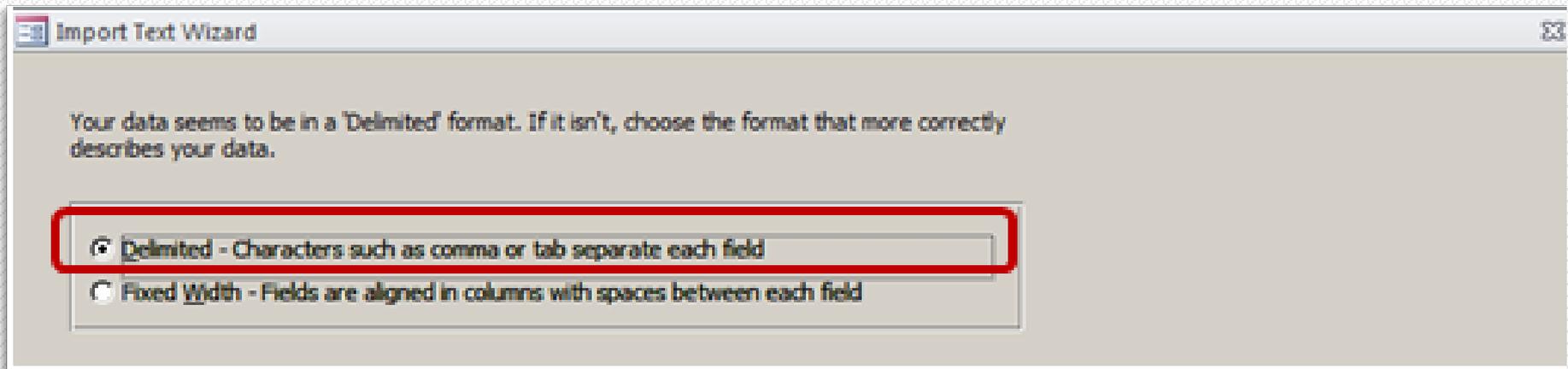
Append a copy of the records to the table: DCR\_PAFRes

If the specified table exists, Access will add the records to the table. If the table does not exist, Access will create it. Changes made to the source data will not be reflected in the database.

Link to the data source by creating a linked table.  
Access will create a table that will maintain a link to the source data. You cannot change or delete data that is linked to a text file. However, you can add new records.

OK Cancel

# Importing New Data Extracts



# Importing New Data Extracts

Import Text Wizard

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

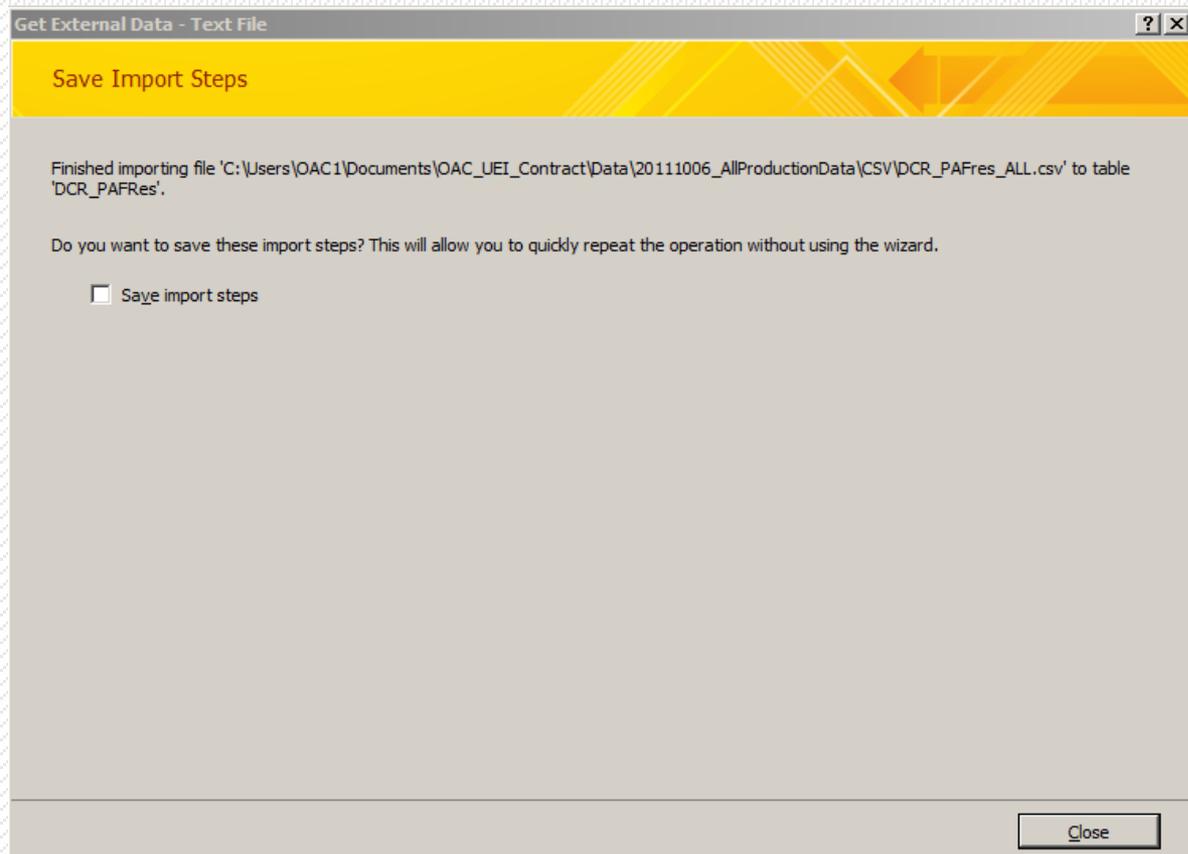
Choose the delimiter that separates your fields:

Tab     Semicolon     Comma     Space     Other:

First Row Contains Field Names    Text Qualifier:

# Importing New Data Extracts

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



# 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

# 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  Semicolon  Comma  Space  Other:

First Row Contains Field Names  Text Qualifier:

- 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) Collection and Reporting (DCR) 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.*



# 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

# Browse Partner Data Template

---

- Select a button and enter criteria to find partners

Browse Partner Data

<b>Browse All Partners' Data</b>	<b>Find a Partner's Data - Search by ID</b>
<b>Find All Partners' Data for a Coordinator</b>	<b>Find a Partner's Data - Search by Name</b>

# Browse Partner Data Template

FrontPage Partner\_Info

## Browse Partner Data Template

Data Displayed Through: 1/15/2012

---

### PARTNER INFORMATION

Partner Name	Jane, Jane 079	Partnership Date	9/20/2011	Days in Partnership	117
County Partner ID	000000157	Partnership Status	Active		
Global ID	b8258ea5-5e9c-4a66-a8d2-d393c1883676	Date Status Change	9/20/2011		
CSI Number	000000157	Program	Adult FSP		
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		Coordinator ID	Sam, Sam		
		Provider Site ID	1234		
		PAF Status	Complete		
		Referred By	Homeless Shelter		
CSI Old Race					
Hispanic	N				

---

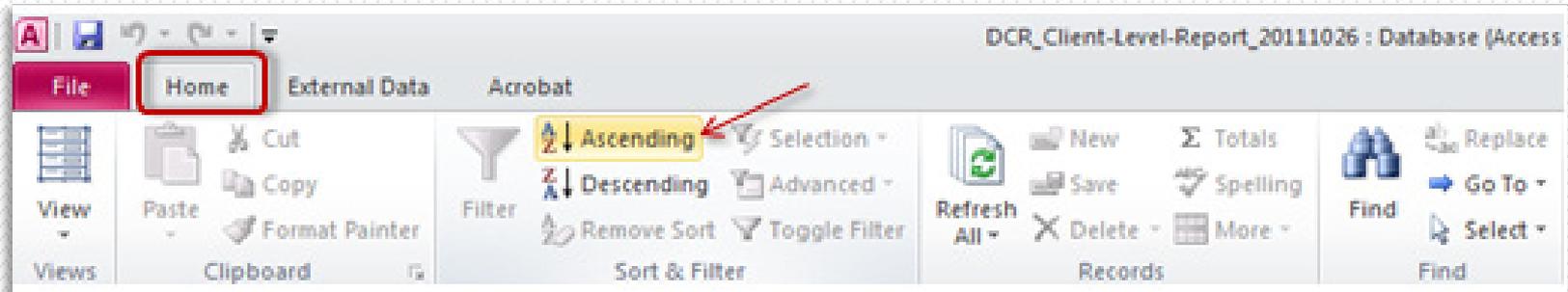
**DOMAIN DATA FOR: Jane, Jane 079** Total 3Ms Due: 1

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

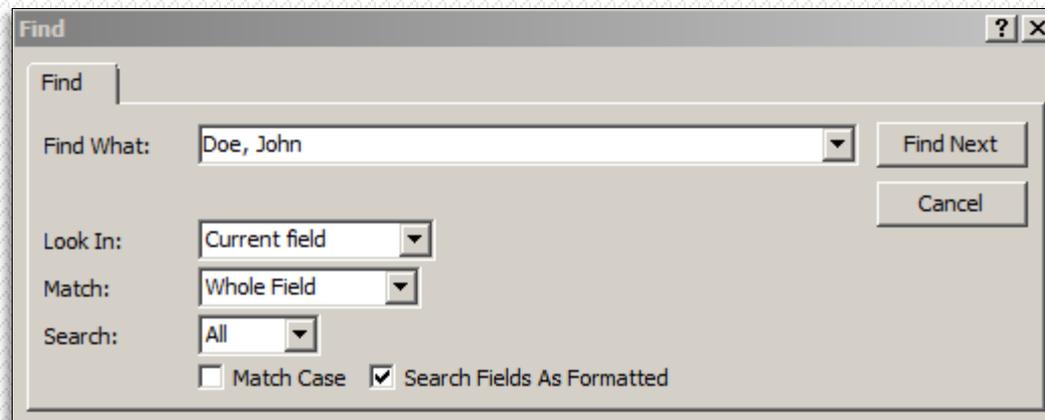
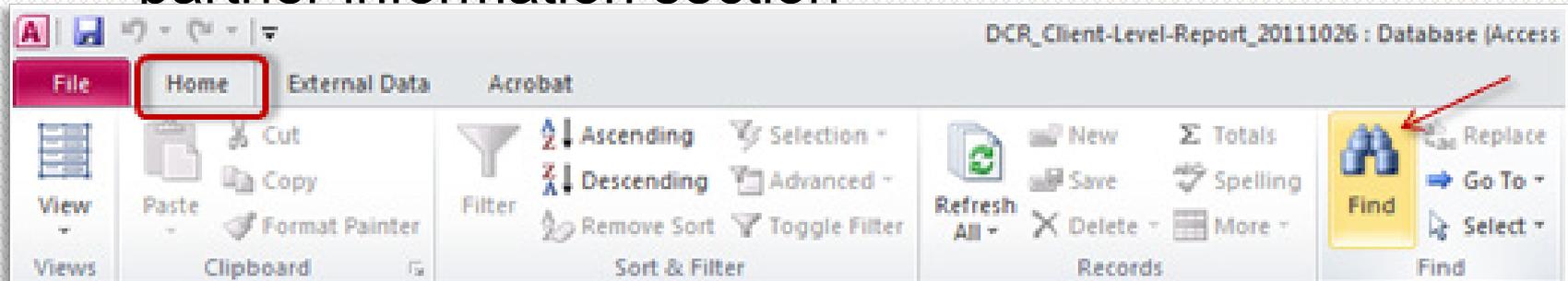
# Browse Partner Data Template

- Sorting Partners



# Browse Partner Data Template

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



# 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

# 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					
<b>HISTORY OF CHANGES TO ADMINISTRATIVE DATA:</b>															
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 MHP	MHP 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						

# Browse Partner Data Template

## ○ D1: Residential tab example

3Ms	Admin. Changes	<b>D1: Residential</b>	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	Home-less	Indiv. Picmnt.	Asstd. Living	Cong. Picmnt.	Comm. Care	Medical Hosp.	Psych. Hosp.	State Psych.	Gp. Home 0-11	Gp. Home 12-14	Comm. Trt.	Res. Trt.	Nursing Physic.	Nursing Psych.	Long-Term Care	Juv. Hall / Camp	DJU	Jail	Prison	Other Setting	Unk. Setting
Homeless	365				27			218	120																				

### 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





# 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												
<b>FINANCIAL SUPPORT IN 12 MONTHS BEFORE FSP:</b>																						
Asses- ment Date	Age	Time Period	Any Caregiver	Any Wages	Any Spouse	Any Savings	Any Child Support	Any Other Family	Any Retire- ment	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								
<b>FINANCIAL SUPPORT DURING FSP:</b>																						
Asses- ment Date	Age	Time Period	Days In FSP	Any Caregiver	Any Wages	Any Spouse	Any Savings	Any Child Support	Any Other Family	Any Retire- ment	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					



# 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

# 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

# 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	
<b>ACTIVITIES OF DAILY LIVING (ADL) DURING FSP:</b>											
Assessment Date	Age Group	Time Period	Days in FSP	Bathing	Dressing	Toileting	Transfer	Continance	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



# Browse Partner Data Template

- Find All Partner's Data for a Coordinator Button

## Browse Partner Data

Browse All Partners'  
Data

Find a Partner's Data -  
Search by ID

Find All Partners' Data  
for a Coordinator

Find a Partner's Data -  
Search by Name

Enter Parameter Value

Enter part of coordinator ID

OK

Cancel

# Browse Partner Data Template

- Find a Partner's Data – Search by ID Button

**Browse Partner Data**

Browse All Partners' Data

**Find a Partner's Data - Search by ID**

Find All Partners' Data for a Coordinator

Find a Partner's Data - Search by ID

Enter Parameter Value

Enter CSI Number (or press OK to skip and use Global ID on next screen)

OK Cancel

Enter Parameter Value

Enter Global ID (or press OK to skip)

OK Cancel

FrontPage Partner\_Info\_SearchbyID

# Browse Partner Data Template

- Find a Partner's Data – Search by Name Button

## Browse Partner Data

Browse All Partners'  
Data

Find a Partner's Data -  
Search by ID

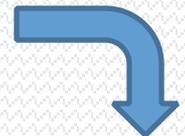
Find All Partners' Data  
for a Coordinator

Find a Partner's Data -  
Search by Name



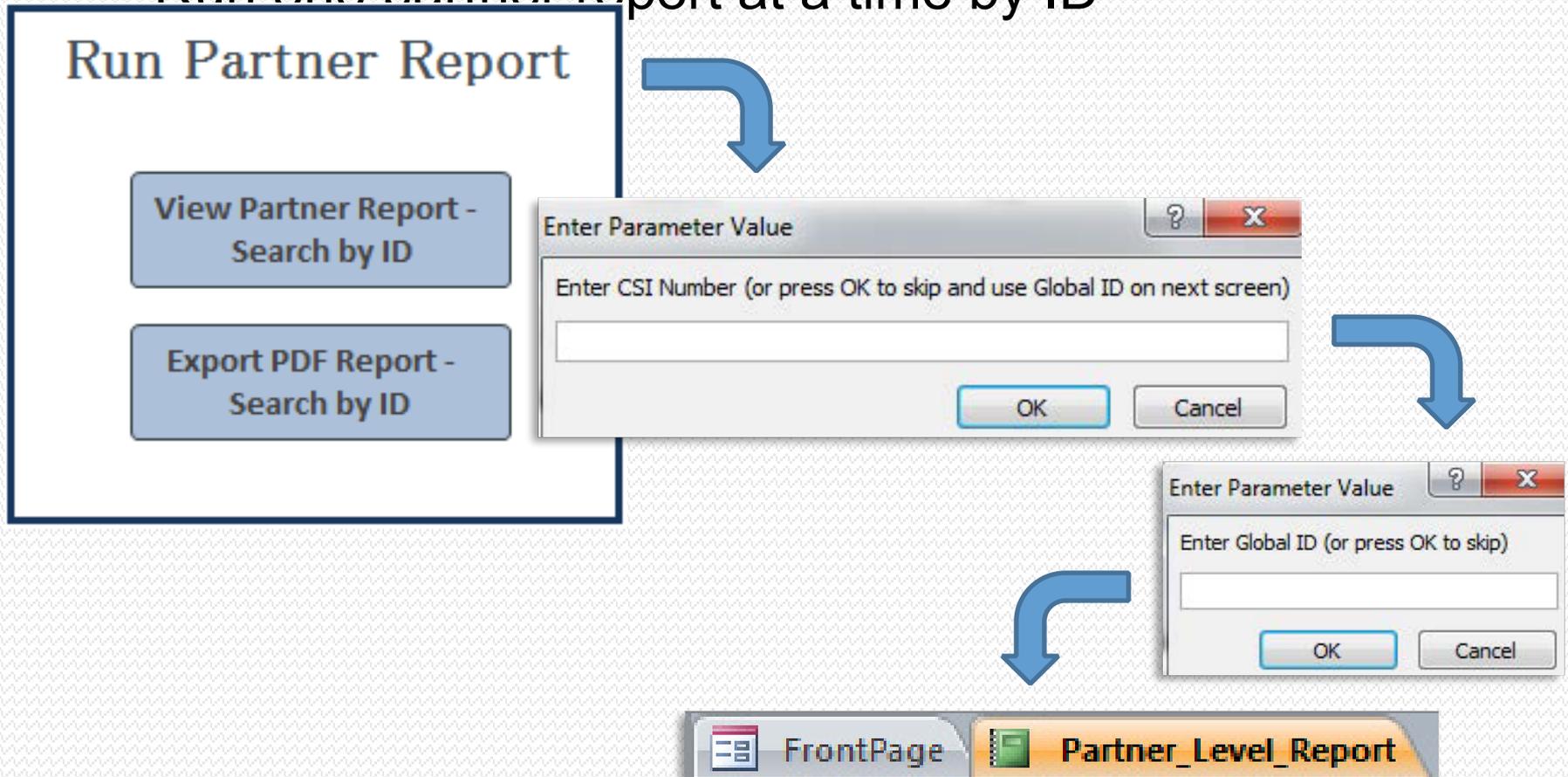
**Enter Parameter Value** [?] [X]

Enter any part or all of a partner's name in the format "Last, First"



# Run Partner Report Template

- Run one partner report at a time by ID



# Run Partner Report Template

File Print Preview Acrobat

FrontPage Partner\_Level\_Report

### Partner Level Report

Data Displayed Through: 10/06/2011

---

#### PARTNER INFORMATION

Partner Name	Partnership Date	Days in Partnership: Total 3Ms Due:
County Partner ID <input type="text"/>	Partnership Status <input type="text"/>	<input type="text"/>
Global ID <input type="text"/>	Date Status Change <input type="text"/>	
CSI Number <input type="text"/>	Program <input type="text"/>	
Gender <input type="text"/>		
Starting Age Group <input type="text"/> Ending Age Group <input type="text"/>		
DCR Date of Birth <input type="text"/>		
CSI Date of Birth <input type="text"/>		
CSI New Race <input type="text"/>	Coordinator ID <input type="text"/>	
	Provider Site ID <input type="text"/>	
	PAF Status <input type="text"/>	
	Referred By <input type="text"/>	
CSI Old Race <input type="text"/>		
Hispanic <input type="text"/>		

Navigation Pane

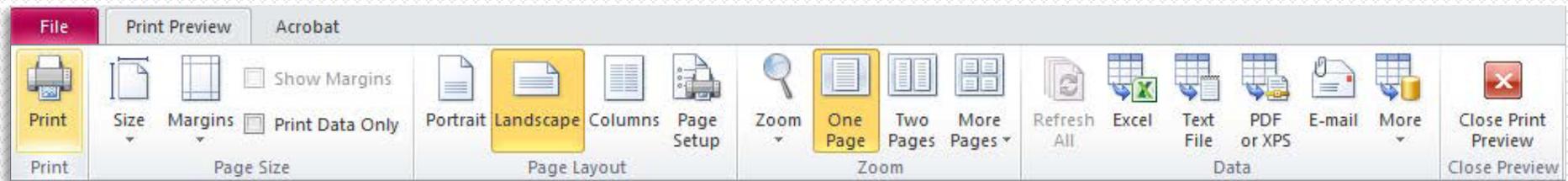
~Confidential Protected Health Information~ Page 1 of 10

Page: 1 No Filter

Ready Num Lock 73%

# Run Partner Report Template

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



# 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**

County Partner ID	00000063	Partnership Status	Inactive
Global ID	8f1a7b0a-c31d-4e06-9d01-4f8f8b7ac71c	Date Status Change	11/23/2010
CSI Number	00000063	Program	Wraparound
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	Coordinator ID	Laura, Laura
		Provider Site ID	1234
		PAF Status	Pending
		Referred By	Social Services Agency
CSI Old Race	American Native		
Hispanic	Y		

## 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 MHSA	MHSA Status
4/7/2009	4/7/2009	1234	4/7/2009	Wireground	4/7/2009	Leure, Leure	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	Ann, Ann									
1/3/2011							11/23/2010	Discontinued	Met Goals						

## PARTNER INFORMATION

Partner Name **John, John 063**

Partnership Date **4/7/2009**

Days in Partnership: **595**

Total 3Ms Due: **6**

## Residential Settings

### 12 Months Before FSP

Residential Setting Yesterday	Total Days Reported Post12	With Parents	With Other Family	Apt. Alone	Single Room Occ.	Foster Relative	Foster Non-Relative	Em. Shelter	Homeless	Indiv. Room	Asst. Living	Cong. Room	Comm. Care	Medical Hosp.	Psych. Hosp.	State Psych.	Gr. Home 0-11	Gr. Home 12-14	Comm. Trt.	Res. Trt.	Nursing Physic.	Nursing Psych.	Long-Term Care	Juv. Hall / Camp	DJ	Jail	Prison	Other Setting	Unk. Setting
Juvenile Hall / Camp	365	345																					20						

### Residential Settings During FSP

Date Residential Change	Days in FSP	Residential Setting	Length at Setting	Assesment Date	Record Created Date
4/7/2009	0	With Parents	20	4/7/2009	04/09/09 2:48:06 PM
4/27/2009	20	Juvenile Hall / Camp	22	4/28/2009	04/28/09 8:51:48 AM
5/19/2009	42	Group Home 12-14	553	5/21/2009	05/21/09 11:58:58 AM

## 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 Emo. Dist.	Ed. for Anoth. Reas.	Attendance	Grades	# Suspensions	# Expulsions	Wks. Not in School	Wks. in High School	Wks. in Tech. School	Wks. in Comm. College	Wks. in Grad. School	Wks. in Other School	Completed Pgm.	Ed. Recov. 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 Emo.	Ed. for Anoth.	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
4/7/2009	4/7/2009	TAY	Start of FSP - PAF		0 8th grade			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										
6/23/2010	6/23/2010	TAY	During FSP - 3Ms	444		No	Yes	Good	Below Average										
9/24/2010	8/13/2010	TAY	During FSP - KET	493								Yes						No	
9/24/2010	9/24/2010	TAY	During FSP - 3Ms	335		No	No												

## PARTNER INFORMATION

Partner Name **John, John 063**

Partnership Date **4/7/2009**

Days in Partnership: **595**

Total 3Ms Due: **6**

## Employment Domain

### 12 Months Before FSP

Assessment Date	Change Date	Age	Time Period	Days In FSP	Competitive Emp.			Supported Emp.			Transitional Emp.			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	Wks	
4/7/2009		TAY	Post 12																			

### Employment During FSP

Assessment Date	Change Date	Age	Time Period	Days In FSP	Competitive Emp.			Supported Emp.			Transitional Emp.			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	
4/7/2009	4/7/2009	TAY	Start of FSP - PAF	0																		Yes

## 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	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 SSDI	Any SDI	Any Tribal	Any Other Support	No 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 SSDI	Any SDI	Any Tribal	Any Other Support	No 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																		
6/25/2010	TAY	During FSP - 3M	444	Yes																		
9/24/2010	TAY	During FSP - 3M	535	Yes																		Yes

## 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

Assessment Date	Age	Time Period	Arrested	Probation Status	Parole Status	Conservatorship Status	Payee Status	WIC Code Status	WIC Code Year
4/7/2009	TAY	Past 12	2	Yes	No	No	No	No	

#### Legal Issues During FSP

Assessment Date	Age	Time Period	Days In FSP	Date Change	Arrested	Probation Status	Parole Status	Conservatorship Status	Payee Status	WIC Code Status	WIC Code Year	No. Dependents on WIC Code	No. Dependents in Foster Care	No. Dependents Reunited	No. Dependents Adopted
4/7/2009	TAY	Start of FSP - PAF	0			Yes	No	No	No	No		0	0	0	0
4/28/2009	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	535									0	0	0	0

---

**PARTNER INFORMATION**

---

Partner Name **John, John 063**Partnership Date **4/7/2009**Days in Partnership: **595**Total 3Ms Due: **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

## PARTNER INFORMATION

Partner Name **John, John 063**

Partnership Date **4/7/2009**

Days in Partnership: **595**

Total 3Ms Due: **6**

### Health and Substance Abuse Domains

#### 12 Months Before FSP

Assessment Date	Age Group	Time Period	Had 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

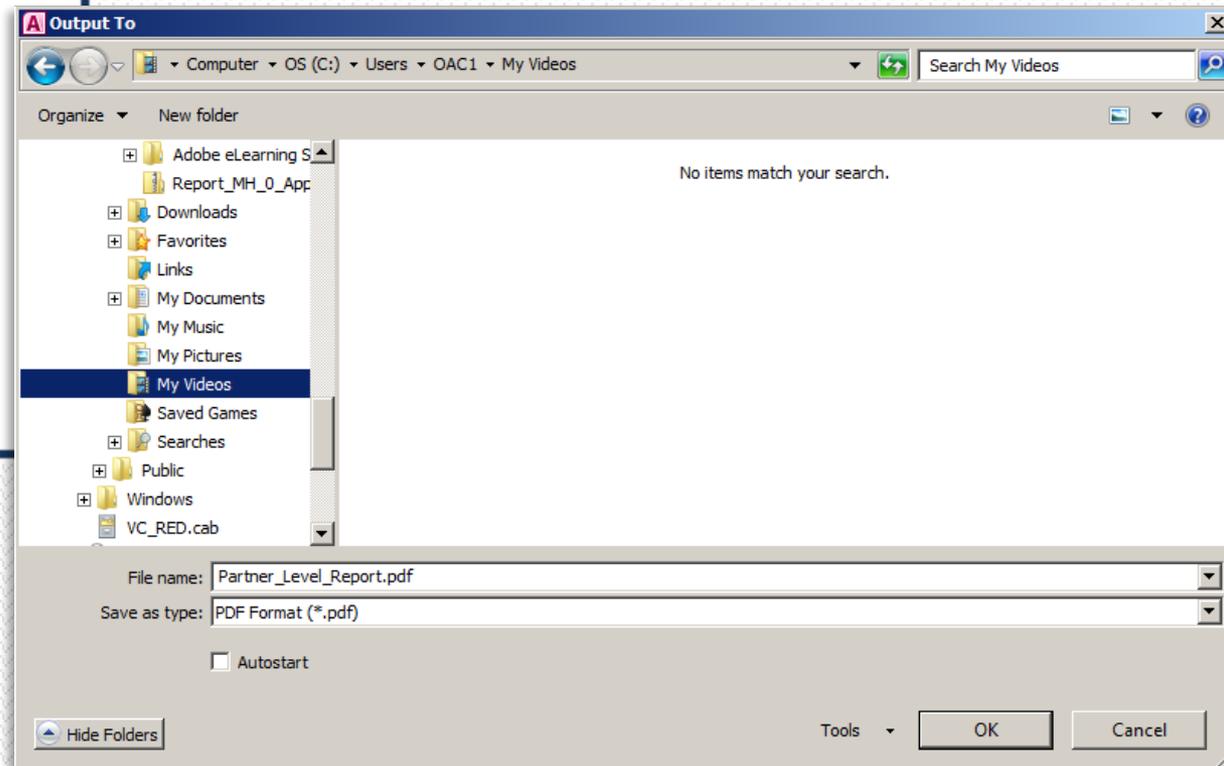
# Run Partner Report Template

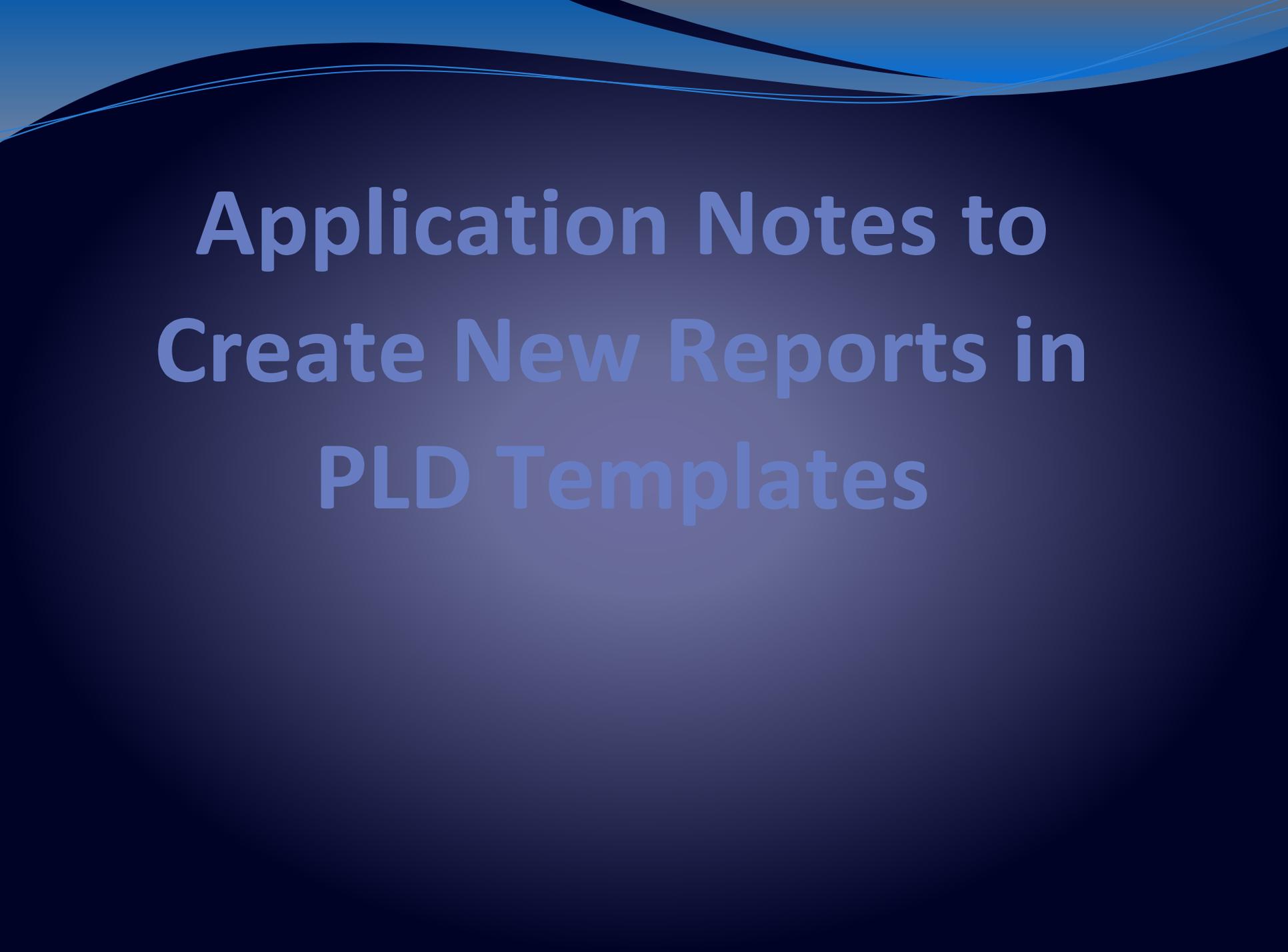
- Exporting a PDF will prompt to save the output file

## Run Partner Report

View Partner Report -  
Search by ID

Export PDF Report -  
Search by ID





# **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

# Application Notes

---

Download the  
Application Notes  
document from  
ITWS and follow  
instructions for  
creating new reports.

## **Full Service Partnership (FSP) Data Collection & Reporting (DCR) Data Extract 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.

# 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
<b>FSP, Youth</b>					
		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 %
<b>FSP, Transitional</b>					
		No	3	500	60 %
		Yes	45	249	61.3 %
	~ ALL PROVIDERS ~	No	3	500	60 %
	~ ALL PROVIDERS ~	Yes	45	249	61.3 %
<b>FSP, Adults &amp; Older Adult</b>					
	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 %
	3811	Yes	1	1162	8.3 %
	~ ALL PROVIDERS ~	No	35	969	18.2 %
	~ ALL PROVIDERS ~	Yes	373	945	13.9 %
<b>FSP, WRAP</b>					
	36CH	Yes	114	813	18.6 %
	36D4	Yes	44	636	1.4 %
	~ ALL PROVIDERS ~	Yes	158	763	14.6 %

# Application Note #2 Reports

## Number of Partnerships by Discontinued Reason for Each Program / Provider

FSP, Family	Provider	Target Criteria	Serving Jail	Placed Juvenile Hall	Ntd Located	Moved	Met Goals	Institution	Discontinue	Deceased	Still in Program
					9	8	5	1	9	5	76
	0000										1
	0000013735										1
	3238				2	1	1			1	4
	ALL PROVIDERS				11	9	6	1	9	6	82
FSP, TAY	Provider	Target Criteria	Serving Jail	Placed Juvenile Hall	Ntd Located	Moved	Met Goals	Institution	Discontinue	Deceased	Still in Program
		3			2	4	6	1	8	3	33
	3356		1		1	1	2		4	1	3
	3588				1						2
	388R		1		1						1
	ALL PROVIDERS	3	2		5	5	8	1	12	4	39
FSP, WRAP	Provider	Target Criteria	Serving Jail	Placed Juvenile Hall	Ntd Located	Moved	Met Goals	Institution	Discontinue	Deceased	Still in Program
		1	3		3	4	2	1	3		121
	1164637823										2
	1200615544										2
	1588734354								1		
	1629379706										3
	6669				5	2	1	1	4		10
	ALL PROVIDERS	1	3		8	6	3	2	8		138
FSP, Transitional Adult	Provider	Target Criteria	Serving Jail	Placed Juvenile Hall	Ntd Located	Moved	Met Goals	Institution	Discontinue	Deceased	Still in Program
		3	3		7	12	14	4	10	19	116
	1033276365										1
	1205955395									1	2
	1679692263				2	1					2
	1801089743					1	1		1	2	12
	1801915491		1			2			1	1	11
	1902945868										1
	1912046137					1				1	3
	1942341300						1				
	ALL PROVIDERS	3	4		9	17	16	4	12	24	148

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

# Application Note #2 Reports

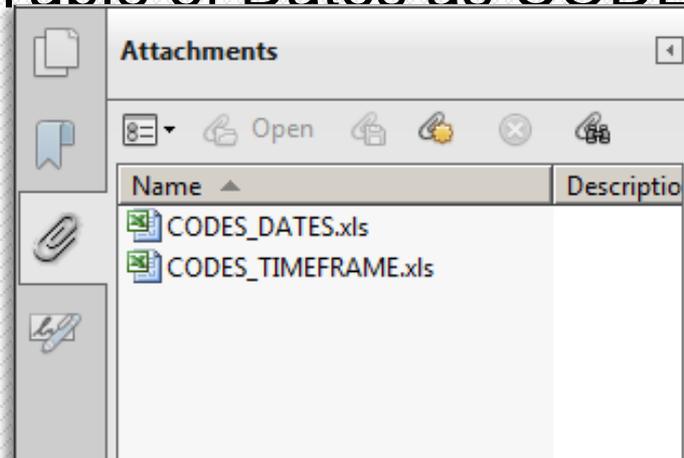
## 2.8: Average Length (Days) in Partnership by Program / Provider and Discontinued Reason\*

FSP, Family	Provider	Target Criteria	Serimg Jail	Placed Juvenile Hall	Nd. Located	Moved	Met Goals	Institution	Discontinue	Deceased	Still in Program
					295	558	966	1042	550	415	372
	0000										219
	0000013735										134
	3238				510	272	1468			117	1663
	ALL PROVIDERS				334	526	1066	1042	550	366	431
FSP, TAY	Provider	Target Criteria	Serimg Jail	Placed Juvenile Hall	Nd. Located	Moved	Met Goals	Institution	Discontinue	Deceased	Still in Program
		552			477	379	769	1047	412	766	634
	3356		995		576	585	1130		794	739	1698
	3588				111						194
	388R		1172		454						1469
	ALL PROVIDERS	552	1064		419	420	859	1047	539	760	714
FSP, WRAP	Provider	Target Criteria	Serimg Jail	Placed Juvenile Hall	Nd. Located	Moved	Met Goals	Institution	Discontinue	Deceased	Still in Program
		170	330		369	165	249	435	478		295
	1164637823										426
	1200615544										237
	1588734354								893		
	1629379706										237
	6669				663	647	490	325	960		1641
	ALL PROVIDERS	170	330		552	326	329	380	771		392
FSP, Transitional Adult	Provider	Target Criteria	Serimg Jail	Placed Juvenile Hall	Nd. Located	Moved	Met Goals	Institution	Discontinue	Deceased	Still in Program
		437	204		353	394	532	270	420	364	1007
	1033276365										1028
	1209955895									510	1192
	1679692263				268	268					1192
	1801089743					245	245		933	956	1185
	1801915491		106			494			49	226	1115
	1902945868										741
	1912046137					115				43	770
	1942341300						174				
	ALL PROVIDERS	437	179		334	373	492	270	432	400	1028

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

# 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)



# 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_3MsCompleted	Partnerships with at least one or more 3Ms	
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_ExclDiscontinuous	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	

# 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

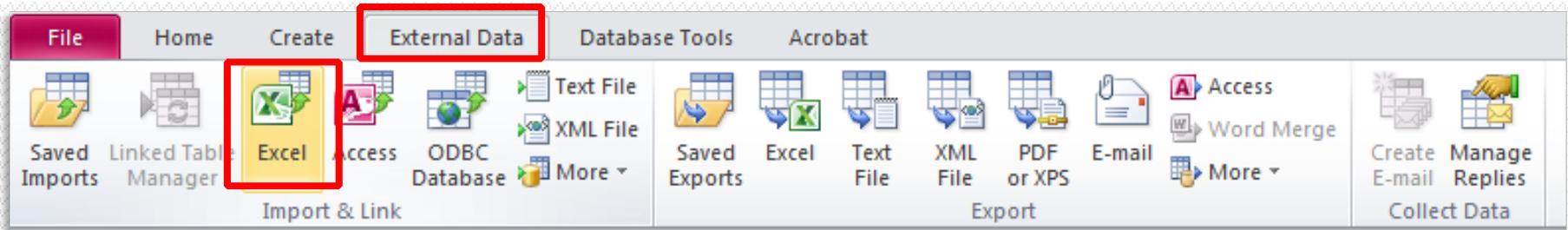
# Before Creating a New Report

- 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

# Import Excel File to Access DB

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



# Import Excel File to Access DB

Get External Data - Excel Spreadsheet

Select the source and destination of the data

Specify the source of the data.

File name:

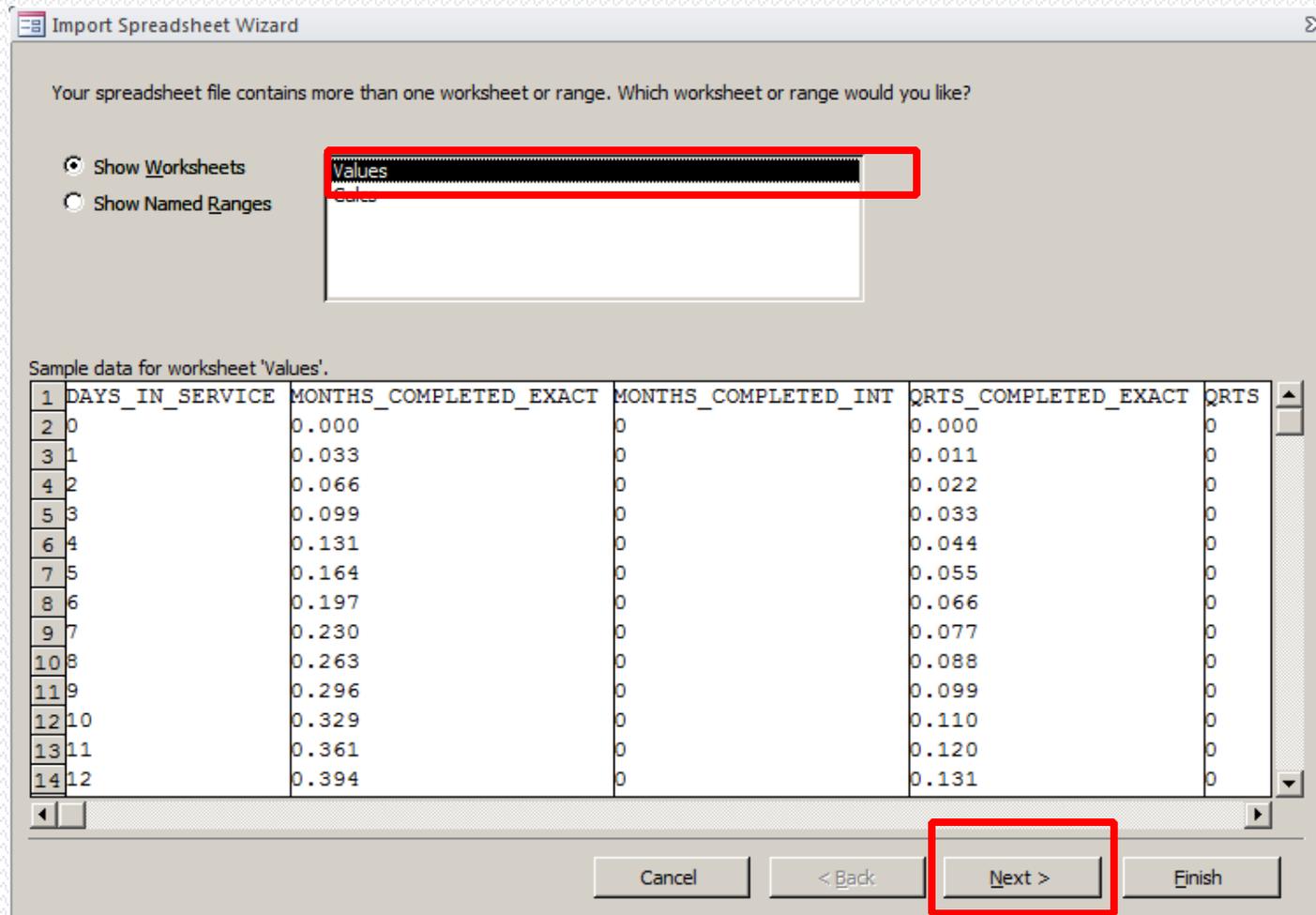
Specify how and where you want to store the data in the current database.

**Import the source data into a new table in the current database.**  
If the specified table does not exist, Access will create it. If the specified table already exists, Access might overwrite its contents with the imported data. Changes made to the source data will not be reflected in the database.

**Append a copy of the records to the table:**   
If the specified table exists, Access will add the records to the table. If the table does not exist, Access will create it. Changes made to the source data will not be reflected in the database.

**Link to the data source by creating a linked table.**  
Access will create a table that will maintain a link to the source data in Excel. Changes made to the source data in Excel will be reflected in the linked table. However, the source data cannot be changed from within Access.

# Import Excel File to Access DB



# Import Excel File to Access DB

Import Spreadsheet Wizard

Microsoft Access can use your column headings as field names for your table. Does the first row specified contain column headings?

First Row Contains Column Headings

	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

# 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.

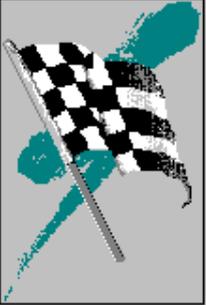
	DAYS IN SERVICE	MONTHS COMPLETED EXACT	MONTHS COMPLETED INT	QRTS COMPLETED EXACT	QRTS
1	0	0.000	0	0.000	0
2	1	0.033	0	0.011	0
3	2	0.066	0	0.022	0
4	3	0.099	0	0.033	0
5	4	0.131	0	0.044	0
6	5	0.164	0	0.055	0
7	6	0.197	0	0.066	0
8	7	0.230	0	0.077	0
9	8	0.263	0	0.088	0
10	9	0.296	0	0.099	0
11	10	0.329	0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

# Import Excel File to Access DB

Import Spreadsheet Wizard

That's all the information the wizard needs to import your data.



Import to Table:  
CODES\_TIMEFRAME

I would like a wizard to analyze my table after importing the data.

Cancel < Back Next > Finish

# 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

# Steps to Create App. Note #1

## Report:

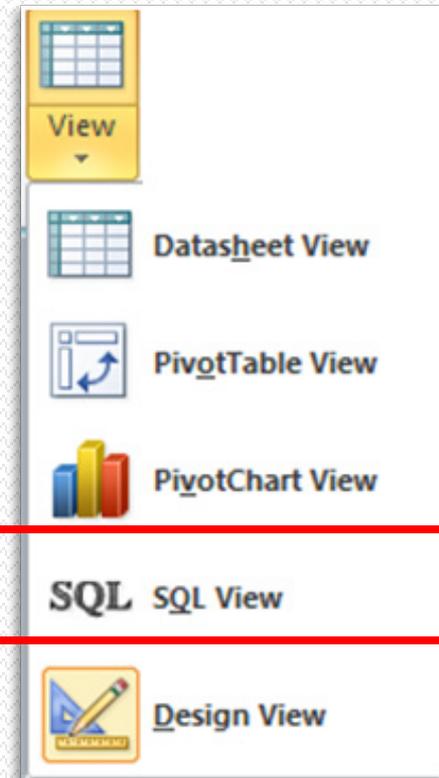
---

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

# 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



# Step 1: Create List of Reestablished Partners

The screenshot displays a database query builder interface. On the left, a list of fields from the **DCR\_KETs** table is shown, with **KETStatus** highlighted. On the right, a table named **Codes\_KetStatus** is shown with fields **Code** and **Description**. A line connects the **KETStatus** field in the left list to the **Code** field in the right table. Below this, a table configuration grid is visible.

Field:	GlobalID	KETStatus	Description	Continuous: "No"	
Table:	DCR_KETs	DCR_KETs	Codes_KetStatus		
Sort:					
Show:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Criteria:		"1"			
or:					

# 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"));
```

# 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-bf04	1	Reestablished	No
003b079b-4187-4290-a1a7-509f	1	Reestablished	No
0041866b-ce51-41e0-bfd6-669d	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-5ae7	1	Reestablished	No
00952c94-b507-47ef-b849-859f	1	Reestablished	No
00c3e5f9-017c-4a2d-9576-1166	1	Reestablished	No
00ee975b-6436-48b3-aede-c161	1	Reestablished	No
0118ee70-dd7a-40c4-b223-0fd1	1	Reestablished	No
014c0569-1317-437d-9cb0-6ea7	1	Reestablished	No
019a20c3-a855-4888-8556-2c13	1	Reestablished	No

# 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

DCR\_3M

- \*
  - AssessmentGUID
  - CountyID
  - CSINumber
  - GlobalID
  - CountyFSPID
  - Name
  - PartnershipDate
  - AssessmentDate
  - DateOfBirth
  - CSIDateOfBirth
  - Gender
  - Ethnicity\_A
  - Ethnicity\_B
  - Ethnicity
  - Race1
  - Race2
  - Race3
  - Race4
  - Race5
  - DatePartnershipStatusChange
  - PartnerShipStatus
  - EmotionalDisturbance
  - AnotherReason
  - AttendanceCurr

Field:	GlobalID	3Ms_Completed: AssessmentDate
Table:	DCR_3M	DCR_3M
Total:	Group By	Count
Sort:		
Show:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Criteria:		
or:		

# 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\_S02\_001\_3MsCompleted**

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

# Step 3: Calculate Length in Program by Partner

The screenshot shows a data tool interface. On the left, a list of fields for the table 'DCR\_PAFnonRes' is displayed. In the center, a calculated field 'DateDataDownload' is shown. At the bottom, a table lists the fields and their corresponding data types and formulas, with checkboxes indicating they are selected for display.

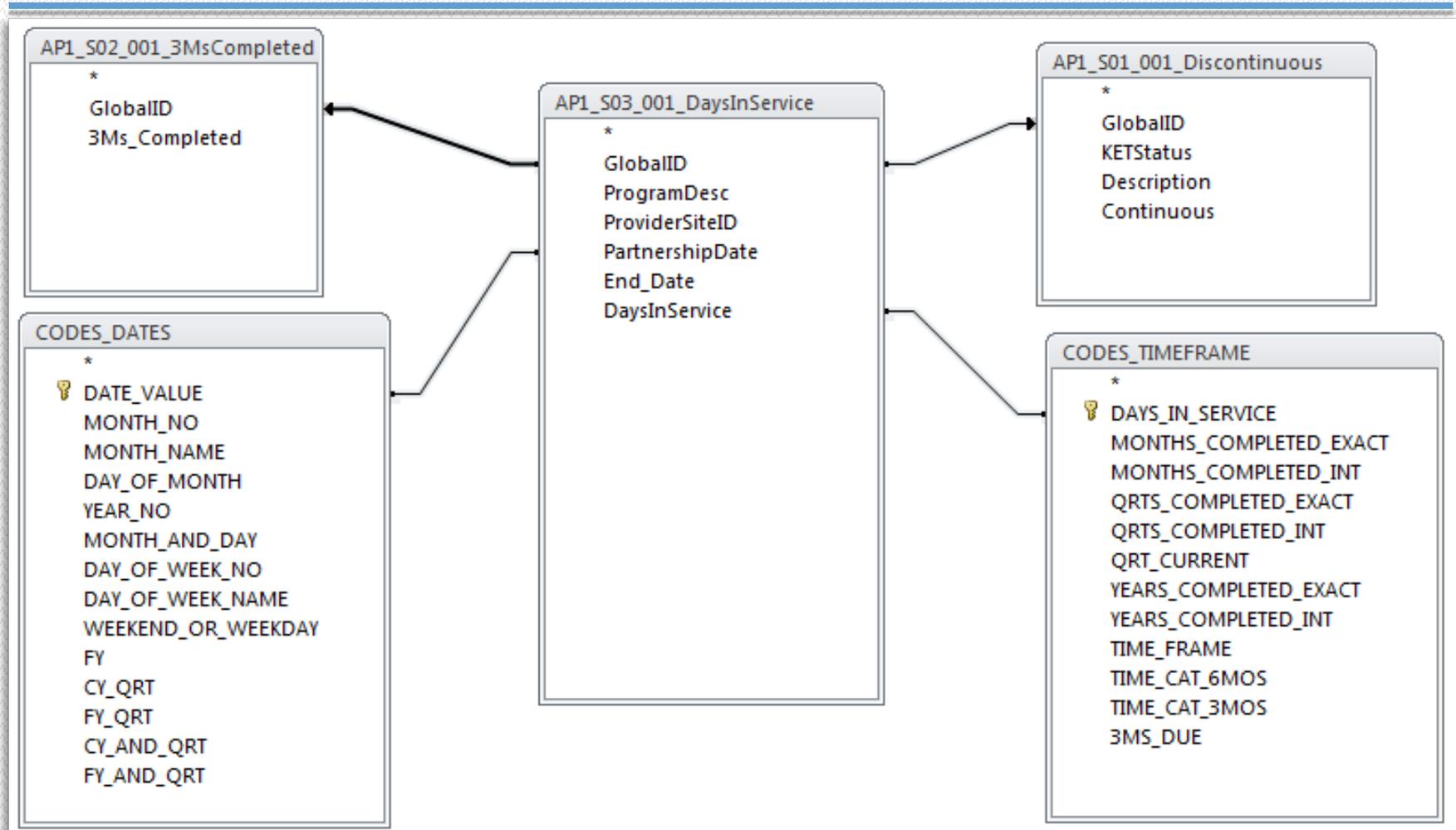
Field:	GlobalID	ProgramDesc	ProviderSiteID	PartnershipDate	End_Date: Iif((PartnershipStatus)=0,[	DaysInService: DateDiff("d",[Partne
Table:	DCR_PAFnonRes	DCR_PAFnonRes	DCR_PAFnonRes	DCR_PAFnonRes		
Sort:						
Show:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
Criteria:						
or:						

# 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\_S03\_001\_DaysInService**

GlobalID	ProgramDesc	ProviderSiteID	PartnershipDate	End_Date	DaysInService
074f58f7-9aa0-498c	TAY FSP	1234	11/2/2010	1/15/2012	439
0b9cf2cb-c724-41cb	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-45b	Wraparound	1234	9/1/2006	1/17/2008	503
1b9ce01c-8d75-4ee	Wraparound	1234	6/15/2009	1/15/2012	944
1d554b0d-e177-4b	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

# Step 4: Combine All Variables by Partner



# Step 4: Combine All Variables by Partner

- Add fields to query definition
- Enter formulas as new fields in query:
  - Continuous\_Enrolled: If([Continuous] Is Not Null,[Continuous],"Yes")
  - 3Ms\_Complete: If([3Ms\_Completed] Is Not Null,[3Ms\_Completed],0)

Field:	3MS_DUE	3Ms_Complete: If([3Ms_Completed] Is Not Null,[3Ms_Completed],0)	Continuous_Enrolled: If([Continuous] Is Not Null,[Continuous],"Yes")	FY_Enrolled: FY
Table:	CODES_TIMEFRAME			CODES_DATES
Sort:				
Show:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Criteria:				
or:				

# 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
0ecb79a5-1190-4b6k	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-8d75-4ee	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-e067-4b88	915	7/14/2009	1/15/2012	TAY FSP	1234	10	7	Yes

# Step 5: Total by Provider, Program and System

AP1\_S04\_001\_Variables\_ByPartner

\*

- GlobalID
- DaysInService
- PartnershipDate
- End\_Date
- ProgramDesc
- ProviderSiteID
- 3MS\_DUE
- 3Ms\_Complete
- 3Ms\_PctnComp\_ByPartner
- Continuous\_Enrolled
- FY\_Enrolled
- FY\_Qrt\_Enrolled
- QRT\_CURRENT

<b>Field:</b>	ProgramDesc	ProviderSiteID	Continuous_Enrolled	GlobalID	DaysInService	3MS_DUE	3Ms_Complete
<b>Table:</b>	AP1_S04_001_Variable						
<b>Total:</b>	Group By	Group By	Group By	Count	Sum	Sum	Sum
<b>Sort:</b>	Ascending	Ascending	Ascending				
<b>Show:</b>	<input checked="" type="checkbox"/>						
<b>Criteria:</b>							
<b>or:</b>							

# Step 5: Total by Provider, Program and System

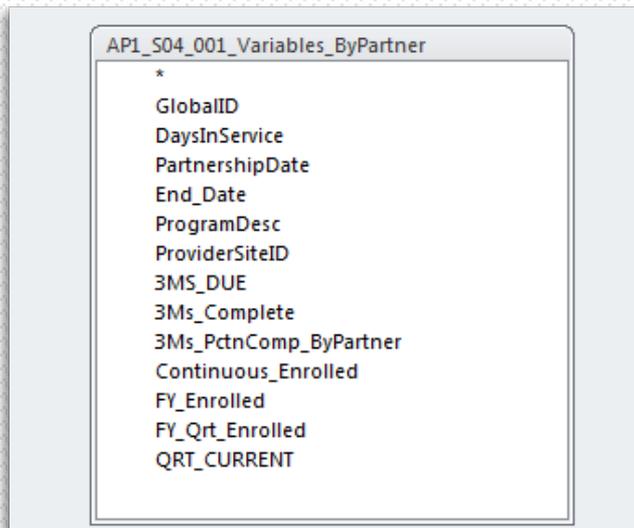
---

- 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**

ProgramID	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

# 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”**



Field:	ProgramDesc	ProviderSiteID: "zz~ ALL PROVIDERS ~zz"	Continuous_Enrolled	GlobalID
Table:	API_S04_001_Variables_ByPartner	API_S04_001_Variables_ByPartner	API_S04_001_Variables_ByPartner	API_S04_001_Variables_ByPartner
Total:	Group By	Group By	Group By	Count
Sort:	Ascending		Ascending	
Show:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Criteria:				
or:				

# 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 I	zz~ ALL PROVIDERS ~zz	No	2	908	19	15	78.9
3300, SF First I	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

# 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"**

AP1\_S04\_001\_Variables\_ByPartner

- \* GlobalID
- DaysInService
- PartnershipDate
- End\_Date
- ProgramDesc
- ProviderSiteID
- 3MS\_DUE
- 3Ms\_Complete
- 3Ms\_PctnComp\_ByPartner
- Continuous\_Enrolled
- FY\_Enrolled
- FY\_Qrt\_Enrolled
- QRT\_CURRENT

Field:	ProgramDesc: "zz~ ALL PROGRAMS ~zz"	ProviderSiteID: "zz~ ALL PROVIDERS"	Continuous_Enrolled	GlobalID
Table:			AP1_S04_001_Variable	AP1_S04_001_Variable
Total:	Group By	Group By	Group By	Count
Sort:	Ascending	Ascending	Ascending	
Show:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Criteria:				
or:				

# 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	zz~ ALL PROVIDERS	No	2037	737	15777	9641	61.1
zz~ ALL PROGRAMS ~zz	zz~ ALL PROVIDERS	Yes	45111	592	277987	156232	56.2

# 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
```

# 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

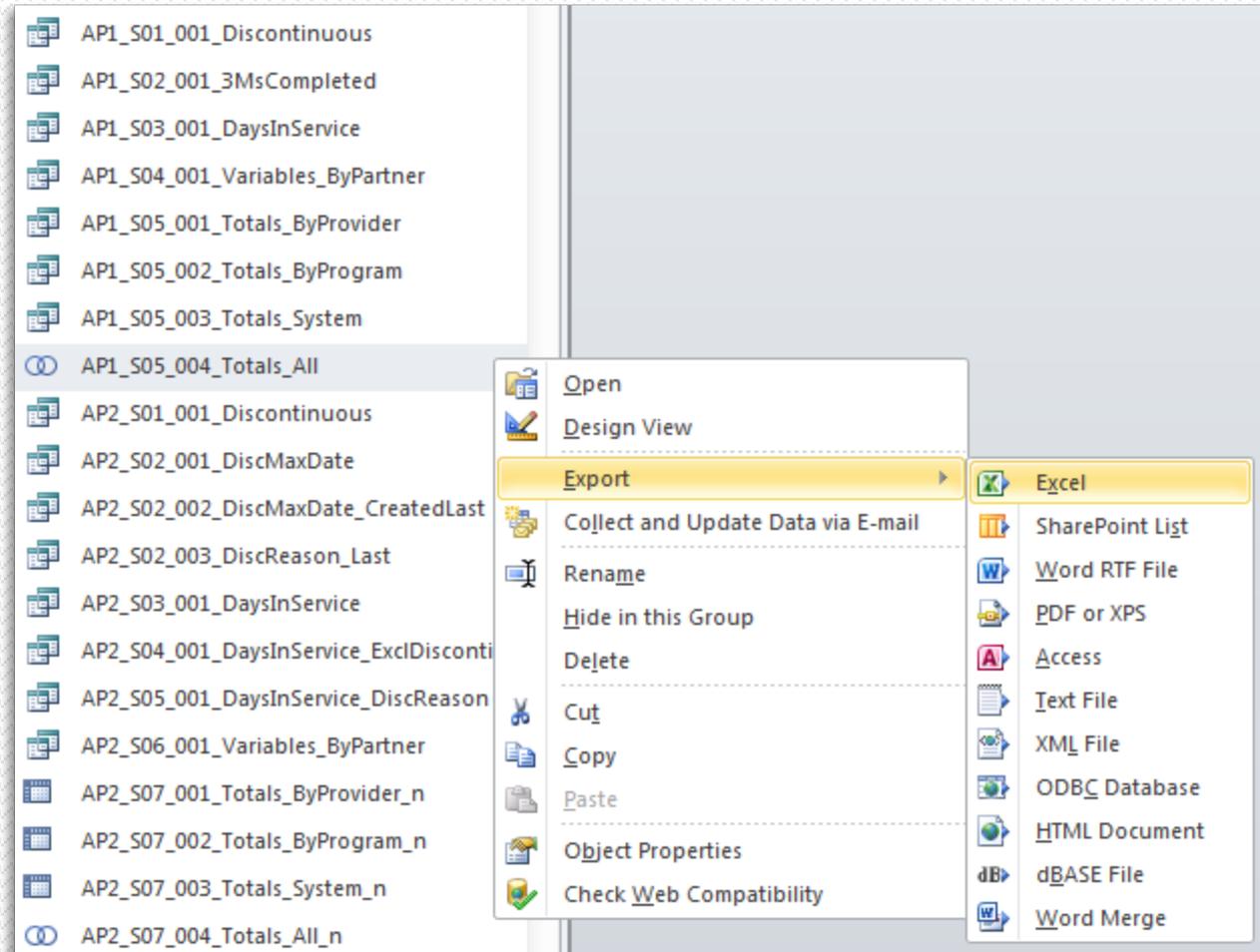
# Step 6: Design Report

---

- Export last query to Excel or
- Create Access report

# Step 6: Design Report - Excel

Right mouse  
click on the  
**AP1\_S05\_00  
4\_Total\_ALL**



# 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
- AvgOfDAYSINSERVICE
- 3Ms\_Due\_Sum
- 3Ms\_Comp\_Sum
- 3Ms\_PctnComp\_ByProvider

Cancel < Back Next > Finish

# Step 6: Design Report - Access

Group by  
[ProgramDesc]

Do you want to add any grouping levels?

**ProviderSiteID**  
Continuous\_Enrolled  
CountOfGlobalID  
AvgOfDAYSINSERVICE  
3Ms\_Due\_Sum  
3Ms\_Comp\_Sum  
3Ms\_PctnComp\_ByProvider

>  
<  
↑  
↓

Priority

**ProgramDesc**  
ProviderSiteID, Continuous\_Enrolled,  
CountOfGlobalID,  
AvgOfDAYSINSERVICE, 3Ms\_Due\_Sum,  
3Ms\_Comp\_Sum,  
3Ms\_PctnComp\_ByProvider

Grouping Options ...    Cancel    < Back    Next >    Finish

# Step 6: Design Report - Access

Sort by:

Report Wizard

What sort order and summary information do you want for detail records?

You can sort records by up to four fields, in either ascending or descending order.

1	<input type="text" value="ProviderSiteID"/>	<input type="button" value="Ascending"/>
2	<input type="text" value="Continuous_Enrolled"/>	<input type="button" value="Ascending"/>
3	<input type="text"/>	<input type="button" value="Ascending"/>
4	<input type="text"/>	<input type="button" value="Ascending"/>



# 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

# Step 6: Design Report - Access

Name the  
Report

Report Wizard



What title do you want for your report?

AP1\_S05\_004\_Totals\_All\_Rpt

That's all the information the wizard needs to create your report.

Do you want to preview the report or modify the report's design?

Preview the report.

Modify the report's design.

Cancel < Back Next > Finish

# Step 6: Design Report - Access

- Design View

Report Header									
AP1_S05_004_Totals_All_Rpt2									
Page Header									
ProgramDesc	ProviderSiteID	Continuous_Enrolled	GlobalID	DAYSINSERVICE	3Ms_Due_Sum	3Ms_Comp_Sum	Provider		
ProgramDesc Header									
Detail									
ProgramDesc	ProviderSiteID	Continuous_Enrolled	Count	AvgOfDAYSINSER	3Ms_Due_Sum	3Ms_Comp_Sum	3Ms_Pctr		
Page Footer									
=Now()									= "Page " & [Page] & " of " & [Pages]
Report Footer									

# Step 6: Design Report - Access

- Resize, rename and relocate fields

The screenshot shows a report design tool interface with a grid of fields. The fields are organized into sections: Report Header, Page Header, ProgramDesc Header, ProgramDesc, Detail, and Page Footer. The main table has columns for Program, Provider, Continuously Enrolled?, No. Of Partnerships, Ave. Length In Pgm to Date (Days), and 3M % Complete. The footer contains a page number field and a page count field.

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
ProgramDesc Header					
ProgramDesc					
Detail					
	ProviderSiteID	Continuous_Enrolled	CountOfGlobalID	%S_IN_SERVICE	Provider%
Page Footer					
=Now()			="Page " & [Page] & " of " & [Pages]		
Report Footer					

# 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
<b>FSP, Youth</b>					
		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 %
<b>FSP, Transitional</b>					
		No	3	500	60 %
		Yes	45	249	61.3 %
	~ ALL PROVIDERS ~	No	3	500	60 %
	~ ALL PROVIDERS ~	Yes	45	249	61.3 %
<b>FSP, Adults &amp; Older Adult</b>					
	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 %
	3811	Yes	1	1162	8.3 %
	~ ALL PROVIDERS ~	No	35	969	18.2 %
	~ ALL PROVIDERS ~	Yes	373	945	13.9 %
<b>FSP, WRAP</b>					
	36CH	Yes	114	813	18.6 %
	36D4	Yes	44	636	1.4 %
	~ ALL PROVIDERS ~	Yes	158	763	14.6 %

# 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

# 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

# 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 A3:E25 and has the following data:

Row Labels	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-4a26-9005-8a4aeb57d72f	192	2	2
003acbd3-c8b5-4a48-b2a3-bf045da5b16f	709	7	7
0048ae1d-8465-4654-9ee6-f7e344a96c7a	529	5	3
00507b13-c3f0-449d-9f4a-f89ac5ce5396	566	6	2
006bc32b-8e0a-4182-b6ed-b2beb3c45ccd	457	5	5
0070bc87-f8cb-4389-a60c-de36f65fd37d	104	1	1
00898385-e00e-4fbf-b4e6-721c4c4eedb0	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-9df5-2898e3387629	248	2	1
00c8faed-65df-4f93-8915-15f1b7a73a19	3009	32	6
00d6ebdf-ed59-4d78-a7a6-f96e1b5bf61a	182	1	2
00dcca1b-909b-448c-9591-c224831ef401	1139	12	10
00dde551-f9bb-4bf9-bf8e-f3ce6dfa863d	187	2	1

The PivotTable Field List task pane is open on the right side of the spreadsheet. It shows the following fields and their placement in the PivotTable:

- Report Filter:** Age\_Group
- Column Labels:** Values
- Row Labels:** GlobalID
- Values:** Average of DaysInService, Average of 3MsDue, Count of AssessmentDate

# 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-cc7	317	3	1	=INT(100*D4/C4)
0226f76d-3169-421b-b31b-bft	143	1	1	100
02311209-29bd-48cc-a5dd-35a	200	2	2	100
023f178d-9e28-4f4c-ac81-be4	114	1	1	100
02417723-e442-470b-a740-4be	1204	13	12	92
024f8841-8e95-4be0-8ea8-221	498	5	3	60
025e870c-92e0-402d-ab79-657	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

# 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-025e	118	1	1	100
ff77e397-e87f-4222-a22a-91b7	567	6	2	33
ff7884ca-911c-4d51-bbb6-3b77	3289	36	12	33
ff811de7-0d75-4397-866a-4217	279	3	2	66
ff822cc2-1260-4ef7-82d6-5737	237	2	2	100
ff89dd28-5e0e-41d5-9e69-4fb7	309	3	3	100
ff8af1b4-47e3-437d-93d8-3a47	604	6	4	66
ff916a06-843b-4227-bf1c-a76e	250	2	2	100
ffcb59ce-d4ad-471b-be9a-7387	342	3	3	100
ffddbaff-9dc3-4604-a0d5-4d57	345	3	3	100
ffed743c-a991-410c-b677-6ad7	203	2	2	100
ffede3c0-1001-4b10-98b8-b287	99	1	1	100
<b>Grand Total</b>	<b>1037.609206</b>	<b>10.85669125</b>	<b>20878</b>	
		26936	20878	=INT(100*D4644/C4644)

# 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 1/5/2012)

# FSP Data Analysis Training

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