



Enhanced Partner-Level Data Templates Training

Introduction

Entering partner information and outcomes in the Data Collection and Reporting System (DCR) is a requirement for all Full Service Partnership (FSP) providers. However, it can be challenging for providers to review aggregated partner data that has been entered. Providers have expressed an interest in being able to interact more directly with the partner level. The Health Services Research Center (HSRC) has developed the following training to support this request.

The Mental Health Services Oversight and Accountability (MHSA) Commission sponsored the development of an Access reporting template for FSP providers, called the **Enhanced Partner-Level Data (EPLD) Templates** [Version 5.0]. The templates were designed to support data quality and service quality improvement, and include "Partner Information" reports, "Partner Alert" reports and "Summary Reports."

Partner Information	Partner Alerts	FSP Metrics Reports	FSP Indicators Reports
<ul style="list-style-type: none">Comprehensive summary of partners' DCR data	<ul style="list-style-type: none">Alerts users of partner status which requires attention (such as due quarterly 3M or inconsistent data points)	<ul style="list-style-type: none">Summary report of enrollment, partners served and Key Event Tracking (KET) assessments	<ul style="list-style-type: none">Summary report of mental health emergency events, hospitalizations, employment, education, arrests/incarcerations and discharge information

The templates also include an ability to divide the dataset by Program, Provider or Partnership Service Coordinator, as well as an ability to export the data for use with other tools. The templates are designed for viewing data (i.e., read only). Data cannot be changed through the EPLD, as these changes would not be propagated to the FSP DCR.

The templates can be obtained from the developers, Mental Health Data Alliance, who host a trove of handy resources for the DCR and CSI systems on their website: <https://www.mhdata.org/resources/>

The following document and training will:

- 1) Describe the benefits and potential uses of the EPLD templates
- 2) Teach FSP DCR users how to download or request their program's data
- 3) Provide FSP DCR users with an overview of the capabilities of each report

Benefits and Potential Uses of the EPLD Templates

The EPLD templates offer several benefits for FSP DCR users. They can be used to:

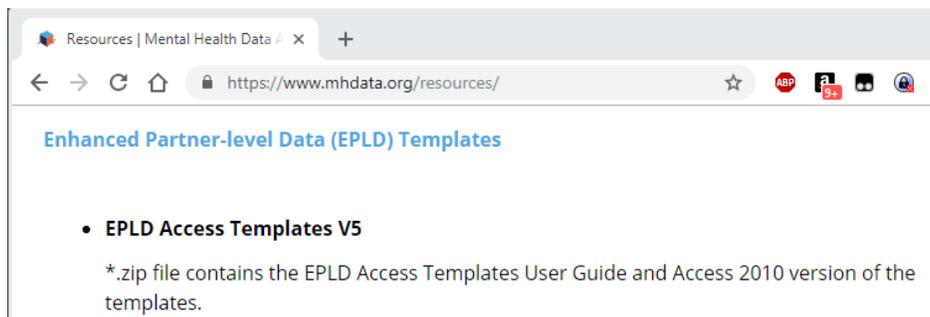
Review individual partner history in the FSP program	Review irregular or questionable data for a partner identified by data quality reports	Identify assessment dates for data requiring correction for a partner
Create a list of all active partners for a designated Provider, Program or Partnership Service Coordinator (PSC)	Plan for 3M assessment collection	Identify duplicate KET assessments
Identify partners no longer actively participating in the FSP program and in need of discharge	Identify partners who have been in a temporary residential setting for more than 30 days	Investigate and troubleshooting XML data submission errors for a partner's data

Commented [AP1]: Track changes didn't track it, but I changed "long" to "longer" in the bottom blue box on the left

Template Download Instructions

Follow the following link <https://www.mhdata.org/resources/> and scroll down until you see the templates. Then click on the most current EPLD Access Templates (highest number). Unzip the files and store in a secure location.

- The EPLS templates are empty (without data). The templates are encrypted with a default password. It is recommended that users change the password for their personal use to further secure the information.
- It is also recommended that users make a copy of the empty EPLD Template as a backup before adding data or making any changes to the templates.



How to obtain FSP DCR data

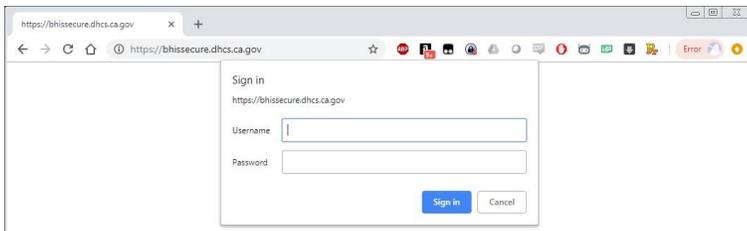
Four DCR CSV files from the FSP DCR must be used to populate the EPLD Templates.

Remember, these files will contain PHI and need to be handled according to HIPAA/HITECH and the Medicare Privacy and Security Agreement.

The data files can be obtained directly from BHIS if your account has download privileges, or from HSRC by contacting Mark Metzger <mcmetzger@ucsd.edu> and Amy Panczakiewicz <apanczakiewicz@ucsd.edu>.

Direct Download Instructions

Navigate to <https://bhissecure.dhcs.ca.gov/> in your browser and enter your login information if not logged in.



Click the Applications button and then click DCR Web Application



Click the Transfers button and then click Download FSP Data Files



Click New Download



The screenshot shows a 'Download' header. Below it is a 'Data Download' section containing a blue button labeled 'New Download'.

Select CSV Flat File from the drop down menu titled Please Select One



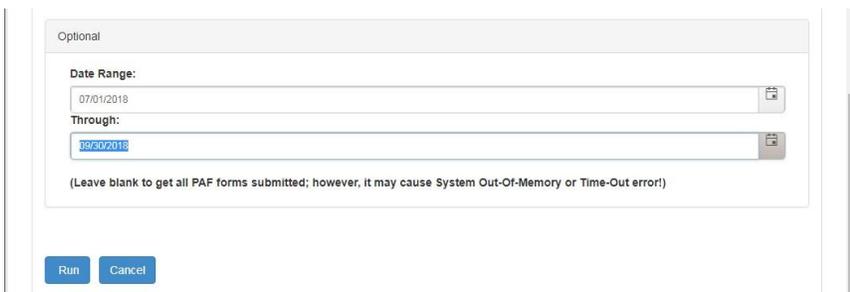
The screenshot shows the 'Download' section with the 'Data Download' box. A dropdown menu is open, showing 'CSV Flat File' selected. Below the dropdown is a link for 'Download Instructions'.

Select the first option PAF (All domains EXCEPT residential). You will need to download all four of these files to import into the database.



The screenshot shows the dropdown menu expanded. The first option, 'Please Select One', is highlighted in orange. Other options include 'PAF (All domains EXCEPT Residential)', 'PAF (Residential information only)', 'Key Event Tracking (KET)', and 'Quarterly Assessment (3M)'. At the bottom of the menu, there is a footer: '© DHCS 2018. Privacy Policy | Terms of Service'.

You can leave the date range blank to download all records, however, PAF nonresidential will occasionally error during the daytime hours due to its size. Also remember, if you set an end date in the past, you will get the current active status of the partners not the active state of the partners at that time. Click run to execute the download and store the files in a secure location.

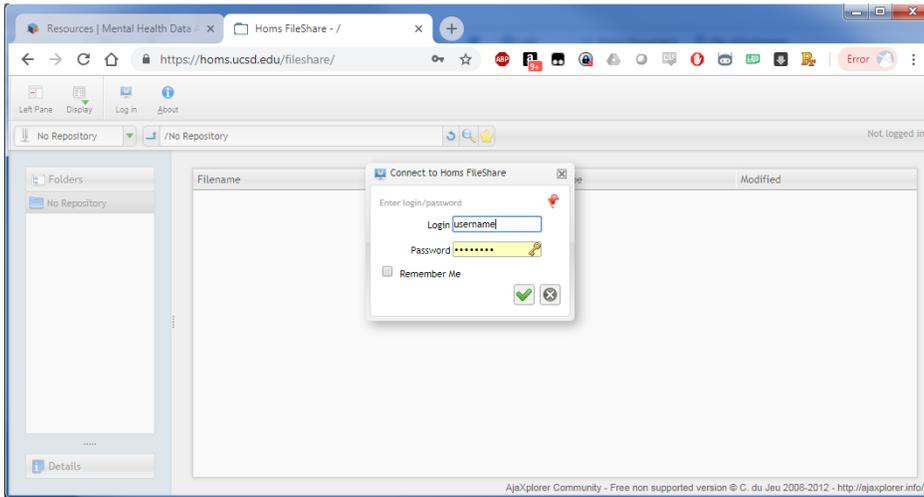


The screenshot shows the 'Optional' section. It contains two date range fields: 'Date Range:' with a date of '07/01/2018' and 'Through:' with a date of '09/30/2018'. Below these fields is a note: '(Leave blank to get all PAF forms submitted; however, it may cause System Out-Of-Memory or Time-Out error!)'. At the bottom are 'Run' and 'Cancel' buttons.

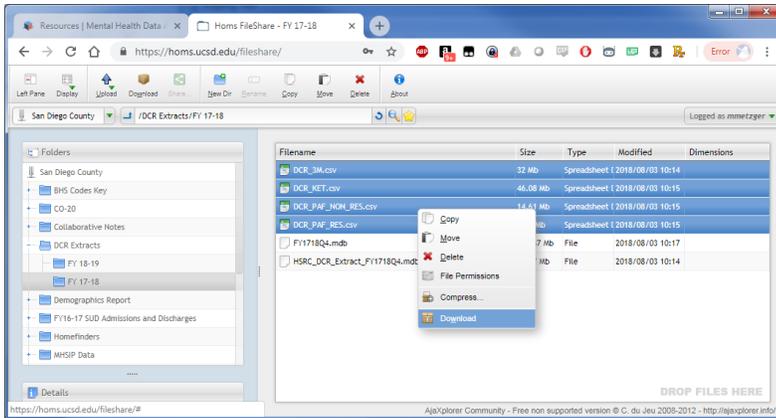
HSRC Data Download Instructions

If you do not have download privileges, you may request the files for your program from HSRC. Please send a request containing the provider ids you wish to have exported to Mark Metzger at <mcmetzger@ucsd.edu> and Amy Panczakiewicz <apanczakiewicz@ucsd.edu>. The files will be uploaded to our secure fileshare server.

Navigate to <https://homs.ucsd.edu/fileshare/> and enter your account information.



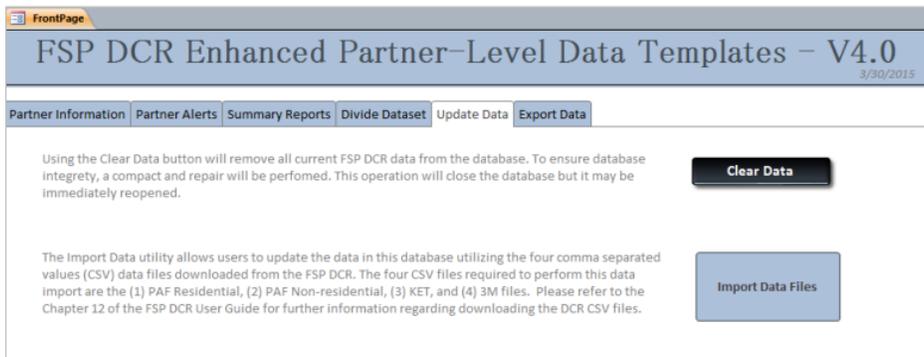
Once you login, you will be directed to your folder. Select all four files, right click, and select download. A save dialog box should appear or the files will be downloaded to your default location. **Remember these are raw data files which contain PHI and should be stored securely.**



Data Import Instructions

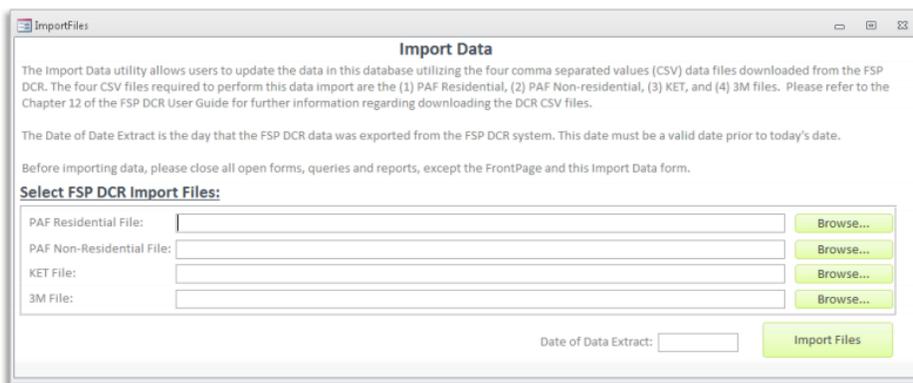
Once you have the data files, you need to import them into the template database. The following instructions comes from the FSP EPLD Templates v5.0 User Manual which comes in the zip file with the database. Before importing new data for the first time, make a copy of the empty EPLD Templates to store as a backup.

With the EPLD Templates open in Microsoft Access, as seen below, select the Update Data tab, then click Clear Data to make sure the database is empty before import.



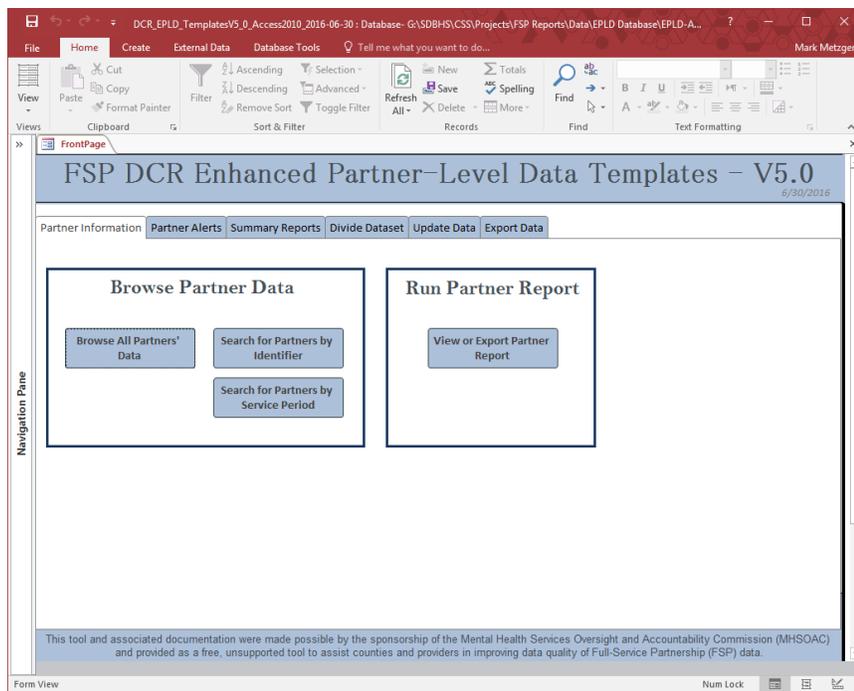
Click on the Import Data Files button to import the new DCR CSV files. On the Import Data screen, as shown below, click on the Browse button for each of the four DCR CSV files and browse to and select the appropriate FSP DCR data file to be imported into the EPLD Templates. In the Date of Data Extract field, enter the date that the four DCR CSV files were downloaded from the FSP DCR system through the BHIS website. Select the Import Files button to import all data into the EPLD Templates. Any errors will cause a warning and then are written to Import_Errors data tables which should be reviewed.

Commented [AP2]: Typo?



Partner Information Reports Tab

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



There are three buttons on the “Partner Information” tab to access the Browse Partner Data (BPD) Template, which allows filtering of the partnership records displayed in the template.

- Browse All Partners – Displays all partnerships’ partnership data. You can search by each field by clicking in the field and then hitting Control-F. You can sort your list by any field by right-clicking in the field and selecting sort ascending or descending.
- Search for Partners by Identifier – Displays the partnership data for a partner based on entering any part of a partner’s name, or by entering a partner’s CSI Number, or DCR Global ID.
- Search for Partners by Service Period – Displays partnership data for any partners who were active at any point during the service period selected, from the selected “Starting Date” and “Ending Date” fields; additionally, the report allows for “Other (Optional)” filtering criteria to be entered.

Browse All Partners

San Diego Browse Partner Data Template
Data Displayed Through: 12/3/2018

PARTNER INFORMATION

Partner Name: David, Shannon L. Partnership Date: 12/27/2018 Days in Partnership: 6
 County Partner ID: Partnership Status: Active
 Global ID: 8870453-4477-4886-9037-6a3f86a6a6a6 Date Status Change: 12/27/2018
 CSI Number: 280232796 Current Program: CNYL/Children and Youth Full Service Partnerships
 Gender: Starting Age Group: Ending Age Group: Ending Age Group: 25-34
 DCR Date of Birth: CSI Date of Birth: Current Coordinator: Anish Peranda
 CSI New Race: Current Provider: 37KR
 Original Program: CNYL/Children and Youth Full Service Partnerships
 Original Coordinator: Anish Peranda
 Original Provide: 37KR
 PAF Status: Pending
 Referred By: School

DOMAIN DATA FOR: David, Shannon L. Total 3Ms Due: 0

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: 0

Assessment Date	Days in Partnership	For Quarter	Age Group at Time of Assessment
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Records: 14 of 30755 No Filter Search

Search for Partners by Identifier

Partner_Info_by_ID

Find Partners by ID

Partner Identifiers

Partnership Name (any part includes...)
 CSI Number
 DCR Global ID

Find Matching Partners...

Search for Partners by Service Period

Partner_Info_by...

Find Partners By...

Service Period*

Required Fields:
 Starting Date: 7/1/2018
 AND
 Ending Date: 9/30/2018

* Will find all partners with an active partnership at any time during this period

Program / Provider / PSC (Optional)

Status as of the Date of Download:
 Current Program Name
 Current Provider: 37KR
 Current Partnership Service Coordinator

Other (Optional)

Status as of the Date of Download:
 Discharged or Still Active Only?
 Referred By
 PAF Age Group
 Ending Age Group

Find Partners

Run Partner Report

The Run Partner Report (RPR) template produces a printable report of one partnership's data. The RPR template displays an overview of the partnership information in a multi-page report which is separated into sections by domain. There are two options for the report:

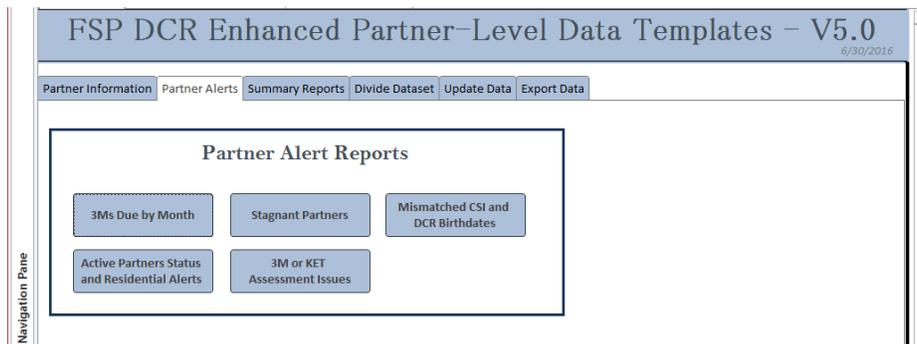
- Preview Report– Displays a printable partnership data report for a partnership by Partnership Name (Exact Name), CSI Number, or by DCR Global ID
- Export PDF Report – Saves a partnership data report as a PDF at a chosen location on the user's drive or network



The screenshot shows a window titled "Partner_Level_Report_Param" with a "Partner Level Report" header. Under "Partner Identifiers", there are three input fields: "Partnership Name (Exact Name: Last, First)", "CSI Number", and "DCR Global ID". Each field is preceded by "OR". At the bottom, there are two green buttons: "Preview Report" and "Export PDF Report".

Partner Alert Tabs

The "Partner Alert" reports are designed to alert users of partner status which require attention, such as quarterly 3-Month (3M) assessments due, residential alerts or inconsistent data points.



The screenshot shows a web application interface titled "FSP DCR Enhanced Partner-Level Data Templates - V5.0" with a date of "6/30/2016". A navigation menu includes "Partner Information", "Partner Alerts", "Summary Reports", "Divide Dataset", "Update Data", and "Export Data". The "Partner Alerts" tab is active, displaying a "Partner Alert Reports" section with five buttons: "3Ms Due by Month", "Stagnant Partners", "Mismatched CSI and DCR Birthdates", "Active Partners Status and Residential Alerts", and "3M or KET Assessment Issues". A vertical "Navigation Pane" is visible on the left side.

3M's Due by Month

Stagnant Partners

Mismatched CSI and DCR Birthdates

Active Partners Status and Residential Alerts

3M or KET Assessment Issues

Example County		Active Partner Status Report										
		Status Snapshot on this Date: 12/1/2018										
		Date Data Downloaded from DCR: 12/6/2018										
Current Program: FSP-1												
Current Provider: Site-100												
CSI Number	Partner Name	Gender	Partnership Date	Length of Service	Status	PAF	Status	Residence	No. 3Ms Due	No. 3Ms Submit	No. 3Ms Partial	No. KETs Submit
Current Coordinator: Sam, Sam												
Older Adult	864820206	John Doe-112	M	6/15/2013	1995	Establ	Compl	Single Room Occupanc	22	4	0	0
Current Program: FSP-2												
Current Provider: Site-100												
CSI Number	Partner Name	Gender	Partnership Date	Length of Service	Status	PAF	Status	Residence	No. 3Ms Due	No. 3Ms Submit	No. 3Ms Partial	No. KETs Submit
Current Coordinator: Bob, Bob												
Adult	339119952	John Doe-574	M	2/19/2012	2477	Establ	Compl	Congregate Placement	27	9	0	3
	208119201	John Doe-702	M	2/22/2013	2108	Establ	Compl	State Psychiatric	23	5	0	0
	765971684	John Doe-263	M	3/5/2013	2097	Reest	Compl	Single Room Occupanc	23	5	0	9
Current Coordinator: Sally, Sally												
Adult	474364441	Jane Doe-456	F	7/26/2012	2319	Establ	Compl	Wth Parents	25	7	0	5
	774819058	John Doe-588	M	3/14/2014	1723	Establ	Compl	Wth Other Family	19	1	0	3
Current Program: FSP-3												
Current Provider: Site-100												
CSI Number	Partner Name	Gender	Partnership Date	Length of Service	Status	PAF	Status	Residence	No. 3Ms Due	No. 3Ms Submit	No. 3Ms Partial	No. KETs Submit
Current Coordinator: Bob, Bob												
Child	973105919	John Doe-787	M	9/27/2013	1891	Establ	Compl	Nursing Physical	20	0	0	0
TAY	724544966	Jane Doe-856	F	10/3/2013	1885	Establ	Compl	Assisted Living	20	0	0	0

Full Service Partnership Missing or Incomplete 3Ms Report

Date Data Downloaded from DCR: 12/3/2018

Program: TADF, Transition Age Youth, Adult & Older Adult Full Service Partnerships
 Provider: 370K
 Coordinator: Anzeila Maldonado

Name	CSI Number	Partnership Date	Status	Days Served	Assessments	3M#	Inc. #	Missing
		4/25/2013	PAF					
		7/25/2013	SM	1				
		10/25/2013	SM	2				
		1/25/2014	SM	3				
		10/25/2014	SM	6				
		1/21/2015	SM	7				
		4/14/2015	SM	8				
		7/14/2015	SM	9				
		10/12/2015	SM	10				
		1/12/2016	SM	11				
		4/12/2016	SM	12				
		7/11/2016	SM	13				
		10/12/2016	SM	14				
		1/10/2017	SM	15				
		4/10/2017	SM	16				
		7/12/2017	SM	17				
		10/12/2017	SM	18				
		1/25/2018	SM	19				
		4/11/2018	SM	20				
		7/11/2018	SM	21	Inc.			
		10/10/2018	SM	22				
							Due Inc.	Missing
							22	1
								2

Enrolled Partners Report - Adult Indicators

Partners Enrolled Between: 7/1/2018 and 9/30/2018
 Date Data Downloaded from DCR: 12/3/2018

San Diego
 Program: All Programs

	Enrolled	Substance Abuse	Mental or Substance	Emergency Medical	Emergency Psychiatric	Inpatient Psychiatric	Homeless/Emergency Shelter	Legal Involvement	Youth Any Listed Issues	Youth Any Listed Issues, Except Substance Abuse
All TAY, Adult & Older Adult	5	60%	0%	0%	100%	20%	20%	100%	100%	
Adult	1	0%	0%	0%	100%	0%	100%	100%	100%	
Older Adult	4	79%	0%	0%	100%	25%	0%	100%	100%	

Program: TADF, Transition Age Youth, Adult & Older Adult Full Service

	Enrolled	Substance Abuse	Mental or Substance	Emergency Medical	Emergency Psychiatric	Inpatient Psychiatric	Homeless/Emergency Shelter	Legal Involvement	Youth Any Listed Issues	Youth Any Listed Issues, Except Substance Abuse
All TAY, Adult & Older Adult	5	60%	0%	0%	100%	20%	20%	100%	100%	
Adult	1	0%	0%	0%	100%	0%	100%	100%	100%	
Older Adult	4	79%	0%	0%	100%	25%	0%	100%	100%	

Summary Reports Tab

The “Summary Reports” are designed to provide “FSP Metrics Reports” and “FSP Indicator Reports”. The “FSP Metrics Reports” provide a summary of partners enrolled, partners served, 3Ms due, 3Ms submitted, and Key Event Tracking (KET) assessments submitted by program or by provider. The “FSP Indicators Reports” provide summaries of mental health emergency events, psychiatric and psychiatric nursing hospitalizations, residential settings, employment, education, arrests, incarcerations and discharge information.

FSP DCR Enhanced Partner-Level Data Templates – V5.0

6/30/2016

Partner Information
Partner Alerts
Summary Reports
Divide Dataset
Update Data
Export Data

FSP Metrics Reports

Data Quality Metrics

Enrolled Partners

FSP Indicators Reports

Residential Status

Emergency Events

Education

Legal Events

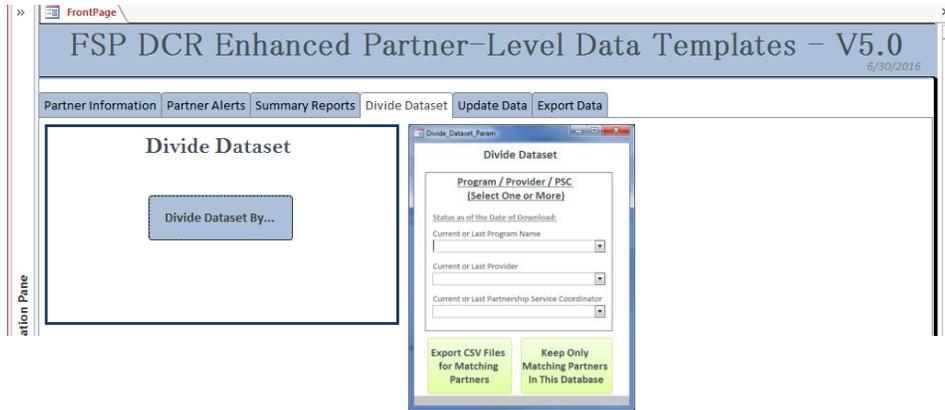
Discharge Values

Employment

Navigation Pane

Divide Dataset Tab

The “Divide Dataset” tab is designed to split the FSP DCR extraction file by Program, Provider or Partnership Service Coordinator (PSC). There is an option to divide the dataset to produce a CSV formatted file output or to reduce the current version of the EPLD Templates to contain only partners currently assigned to a selected Program, Provider or Partnership Service Coordinator.



Export Data Tab

The “Export Data” tab provides the ability to export FSP data for use with other tools. The EPLD template can export FSP participation data for use with the Client and Services Information (CSI) Submission File Analysis (SFA) Tool or it can export FSP domain outcomes for the purposes of the MOQA project led by the California Behavioral Health Directors Association (CBHDA).

