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| The MIchigan Department of Community Health |
| **Annual DHIP Outcomes Reporting** |
| **CAFAS® and PECFAS® Exporting and Reporting Guide** |
|  |
|  |
| **9/30/2013** |

*Updated December 2014*

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| The following document provides step-by-step instructions for CMH’s to create annual outcomes reports regarding the youth they received DHS Incentive Payments for within a given fiscal year. Instructions are provided to create reports in either Microsoft® Office Access or Excel. |

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# Overview and Introduction

Within this document are instructions for exporting data and creating the annual outcome reports required by MDCH of all CMH’s who received DHIP payments within a fiscal year. The instructions specify Fiscal Year 2014 which includes the dates October 1, 2013 through September 30, 2014. To use these instructions for subsequent fiscal years, change corresponding date ranges in the export instructions and replacing the code “DHIPFY14” with “DHIPFY15,” “DHIPFY16,” etc. wherever it appears in query instructions.

These instructions are written for individuals who have “IT Administrator” or “Business Administrator” user access within the Functional Assessment Systems application located at: <https://app.fasoutcomes.com/>.

Prior to beginning the export and reporting steps in this document, check to insure your agency has labeled the DHIP youth within the FAS application. (For information on how to enter these labels, see the separate document provided by MDCH titled “DHIP Labeling Instructions.”) To complete this check, log into the FAS application and look under the “Clients” header at the top of the Navigation Menu and select “Search by Caregiver.” Next to the Caregiver ID field enter “DHIPFY14,” choose the “Both” radio button, and then “Search.” You will see a list of youth whose records have been flagged.

*The DHIP label is housed within the* ***Caregiver Information*** *in the FAS application. To see a list of identified youth:*

* *Search by Caregiver*
* *Caregiver ID = DHIPFY14*
* *Show = Both*

These instructions will walk the user through exporting necessary CAFAS® and PECFAS® variables from the Functional Assessment Systems application and from this exported information identify youth for whom DHS Incentive Payments were provided within the fiscal year. Outcomes reports will be generated to provide averages based on CAFAS® and PECFAS® total scores indicating what the initial total level of impairment was at the beginning of treatment for each youth (no matter when treatment began), what the total level of impairment was at the end of the fiscal year (regardless of if the youth was active or closed to treatment at the end of the fiscal year), and the difference in scores between these two points in time.

*Reports will contain* ***four items*** *each for PECFAS*® *and CAFAS*®*:*

1. *Number of youth served*
2. *Average Initial Total Score*
3. *Average Total Score for last assessment within fiscal year*
4. *Average change in Total Score*

This document provides instructions for generating reports for both PECFAS® and CAFAS®. You will need both PECFAS® and CAFAS® reports if your agency served youth in both the age ranges 4 - 6 and 7 – 17. For your convenience, instructions are provided for generating reports in either Microsoft® Access or Microsoft® Excel.

***Tip:*** *Users may find creating these reports in Microsoft*® *Access to be simpler, even if they have little prior experience with this software.*

Throughout the document you will find the instructions interspersed with many Tips, often displayed within text boxes. These tips are intended to provide clarification or additional information to users who may be unfamiliar with the concepts outlined.

# Using Microsoft® Access to Create the CAFAS® DHIP Report

## Step 1: Exporting the data for use in Access

***Tip:*** *Within the FAS application, Data Export is an item on the Navigation Menu along the left side of the screen. Once in the Data Export screen, select “CAFAS” from the tabs along the top. To learn more about accessing and creating data exports, click the “Help” link found in the upper right corner of all screens within the FAS application and search for the document “Help: Data Export – CAFAS®.”*

1. **Specify the criteria for data to be exported.**

Export Client Records where

Date Type: **Date Assessed**

From: **10/1/2013**

To: **9/30/2014**

Radio button: **Export Only assessments in time frame**

Export Details

Export Type: **XML**

Current Case Status: **Both**

Client General Info

*Leave all fields blank*

Specific Client Info

*Leave all fields blank*

Service Area/Programs

**Choose all Programs containing DHIP youth assessments.**

***Tip:*** *Assessment Information is stored with the Program that completed the assessment. Be sure to select all programs that may have completed an assessment on DHIP youth, such as Access/Intake departments or other programs the youth may have transferred between.*

Export Variables

***Tip:*** *The variables indicated here are necessary for creating the report in Microsoft® Access. Additional variables may be exported if desired. The user may wish to simply select “All” at the top of the variable list box.*

Client Demographics:

**Client Primary ID**

Caregiver(s) Demographics:

**Caregiver Customer Entered ID**

Assessment(s) Info:

**Assessment Date**

**Assessment Administration Type**

**CAFAS Total Score**

**Difference in Total Score**

1. **Complete the Export Request**

***Tip:*** *Click the blue “Export” button located towards the left at the bottom of the screen.*

1. **Download the file**

Save to the filename “DHIP FY14 CAFAS.xml.”

***Tip:*** *Completing the Export Request will take you to the “Export Requests” page which will show the status of the export request you just completed (as well as any other requests you have completed within the previous 24 hours). The status will initially show as “Pending” and then “In Process.” Completing the request will likely take a few minutes. If you navigate away from the Export Requests page the status will update each time you return. Otherwise, click “Refresh Status” to check the progress. When the file is ready the status will change to “Completed” in bold green font and a link to “Download Files” will appear next to it. Clicking on this link will take you to another screen where your file will appear as CAFAS Export Data XML (.xml). Click this link and follow your web browser’s instructions for downloading and saving the file.*

## Step 2: Creating the CAFAS® DHIP Report within Microsoft® Access

***Tip:*** *The Help menu within the FAS application provides a useful document “FAS Outcomes™ - Using XML” found as a link under the heading “Import XML data into an ACCESS Database.” This document gives detailed step-by-step instructions with screenshots for importing CAFAS*® *data into Access.*

1. **Import the data into Microsoft® Access**
   1. Create a new Blank Database in Access with a File Name and location of your choosing.
   2. Select “External Data” from the menu bar

***Tip:*** *Menu buttons are on the very top of the page.*

* 1. Choose “XML File” from the toolbar

***Tip:*** *The Toolbar options appear underneath the menu bar.*

* 1. Use the Browse button to locate and select your “DHIP FY14 CAFAS.xml” file
  2. Choose “Structure and Data” Import Options and “OK” the import

1. **Prepare the data for analysis**
   1. Open the table “assessDetails : Table”
   2. Go to Design View

***Tip:*** *This is under the Home menu bar button and is the View option depicted by a pencil, ruler, and protractor.*

* 1. Change Data Types

***Tip:*** *To change Data Types, highlight the variable listed under Field Name and then select the Data Type from the dropdown menu that appears when you click on the current Data Type.*

|  |  |
| --- | --- |
| **Field Name** | **Data Type** |
| Assessment\_Date | *Date/Time* |
| CAFAS\_Total\_Score | *Number* |
| Difference\_in\_Total\_Score | *Number* |

* 1. Save the changes and close the table

***Tip:*** *Ignore the warning that some data may be lost.*

1. **Create the report**
   1. Choose “Create” from the top menu bar and “Query Design” from the toolbar underneath
   2. Close the “Show Table” pop-up
   3. Under the Design menu, choose “SQL View” *(View tool button on the far left)*
   4. Copy and paste the following syntax into the SQL query design window.

*Tip: Paste over the automatically generated SELECT; prompt if it appears when the window opens.*

SELECT TOP 1 (select count(\*) FROM ((assessDetails AS details INNER JOIN (SELECT assessDetails.id1, MAX(assessDetails.Assessment\_Date) AS maxDate FROM assessDetails GROUP BY assessDetails.id1) AS maxAssessment ON (details.id1 = maxAssessment.id1) AND (details.Assessment\_Date = maxAssessment.maxDate)) INNER JOIN subscaleInfo ON details.assessmentID = subscaleInfo.assessmentID) INNER JOIN caregiver ON details.id1 = caregiver.id1 WHERE ((([caregiver]![cgID])="DHIPFY14"))) AS [# FY14 DHIP CAFAS Youth], (select avg(Iif (details.assessment\_administration\_type = 'Initial CAFAS', details.CAFAS\_Total\_score, ([CAFAS\_Total\_Score])+([Difference\_in\_Total\_Score]))) FROM ((assessDetails AS details INNER JOIN (SELECT assessDetails.id1, MAX(assessDetails.Assessment\_Date) AS maxDate FROM assessDetails GROUP BY assessDetails.id1) AS maxAssessment ON (details.id1 = maxAssessment.id1) AND (details.Assessment\_Date = maxAssessment.maxDate)) INNER JOIN subscaleInfo ON details.assessmentID = subscaleInfo.assessmentID) INNER JOIN caregiver ON details.id1 = caregiver.id1

WHERE ((([caregiver]![cgID])="DHIPFY14"))

) AS [Average Initial Total Score], Avg([CAFAS\_Total\_Score]) AS [Average Last Total Score], (select avg(Difference\_in\_Total\_Score) FROM ((assessDetails AS details INNER JOIN (SELECT assessDetails.id1, MAX(assessDetails.Assessment\_Date) AS maxDate FROM assessDetails GROUP BY assessDetails.id1) AS maxAssessment ON (details.id1 = maxAssessment.id1) AND (details.Assessment\_Date = maxAssessment.maxDate)) INNER JOIN subscaleInfo ON details.assessmentID = subscaleInfo.assessmentID) INNER JOIN caregiver ON details.id1 = caregiver.id1

WHERE ((([caregiver]![cgID])="DHIPFY14"))

and Difference\_in\_Total\_Score is not null) AS [Average Improvement]

FROM ((assessDetails AS details INNER JOIN (SELECT assessDetails.id1, MAX(assessDetails.Assessment\_Date) AS maxDate FROM assessDetails GROUP BY assessDetails.id1) AS maxAssessment ON (details.Assessment\_Date = maxAssessment.maxDate) AND (details.id1 = maxAssessment.id1)) INNER JOIN subscaleInfo ON details.assessmentID = subscaleInfo.assessmentID) INNER JOIN caregiver ON details.id1 = caregiver.id1

WHERE ((([caregiver]![cgID])="DHIPFY14"));

* 1. Run the Query

***Tip:*** *The Run command is indicated by a red exclamation point in the Design toolbar*

Results will appear similar to the Query table below. Information can be copied into a word-processing document along with PECFAS® results and submitted in accordance with reporting requirements.

| **Query1** | | | |
| --- | --- | --- | --- |
| **# FY14 DHIP CAFAS Youth** | **Average Initial Total Score** | **Average Last Total Score** | **Average Improvement** |
| 6 | 114 | 104 | 12.5 |

### *Optional:* Creating a master list of cases

To create a master list of DHIP CAFAS® cases with individual case scores (for internal agency use), save the outcomes query completed in the step above and repeat steps a, b and c under “Create the Report.” For this report, copy and paste the following SQL syntax:

SELECT details.id1 AS [Client ID], caregiver.cgID, details.CAFAS\_Total\_Score AS [FY14 Last CAFAS Total Score], IIf([details].[assessment\_administration\_type]='Initial CAFAS',[details].[CAFAS\_Total\_score],([CAFAS\_Total\_Score])+([Difference\_in\_Total\_Score])) AS [Initial Total Score], details.Difference\_in\_Total\_Score AS Improvement, details.Assessment\_Date AS [Last Assessment Date], details.Assessment\_Administration\_Type AS [Last Administration]

FROM ((assessDetails AS details INNER JOIN (SELECT assessDetails.id1, MAX(assessDetails.Assessment\_Date) AS maxDate FROM assessDetails GROUP BY assessDetails.id1) AS maxAssessment ON (details.Assessment\_Date = maxAssessment.maxDate) AND (details.id1 = maxAssessment.id1)) INNER JOIN subscaleInfo ON details.assessmentID = subscaleInfo.assessmentID) INNER JOIN caregiver ON details.id1 = caregiver.id1

WHERE ((([caregiver]![cgID])="DHIPFY14"))

ORDER BY details.id1;

Run the Query and results will appear like the example shown below.

| **Query1** | | | | | | |
| --- | --- | --- | --- | --- | --- | --- |
| **Client ID** | **cgID** | **FY14 Last CAFAS Total Score** | **Initial Total Score** | **Improvement** | **Last Assessment Date** | **Last Administration** |
| 003 | DHIPFY14 |  |  |  | 6/14/2013 | 15 Months |
| 004 | DHIPFY14 | 110 | 120 | 10 | 3/12/2013 | 6 Months - Q2 |
| 002 | DHIPFY14 | 90 | 100 | 10 | 6/27/2013 | 18 Months |
| 005 | DHIPFY14 | 130 | 140 | 10 | 6/26/2013 | 3 Months - Q1 |
| 006 | DHIPFY14 | 70 | 70 |  | 6/27/2013 | Initial CAFAS |
| 001 | DHIPFY14 | 120 | 140 | 20 | 5/28/2013 | 27 Months |

# Using Microsoft® Excel to Create the CAFAS® DHIP Report

## Step 1: Exporting the Data

***Tip:*** *Within the FAS application, Data Export is an item on the Navigation Menu along the left side of the screen. Once in the Data Export screen, select “CAFAS” from the tabs along the top. To learn more about accessing and creating data exports, click the “Help” link found in the upper right corner of all screens within the FAS application and search for the document “Help: Data Export – CAFAS*®*.”*

1. **Specify the criteria for data to be exported.**

Export Client Records where

Date Type: **Date Assessed**

From: **10/1/2013**

To: **9/30/2014**

Radio button: **Export Only assessments in time frame**

Export Details

Export Type: **CSV**

Current Case Status: **Both**

Client General Info

*Leave all fields blank*

Specific Client Info

*Leave all fields blank*

Service Area/Programs

**Choose all Programs containing DHIP youth assessments.**

***Tip:*** *Because Microsoft® Excel works with data in a flat data file, the location of variables within a spreadsheet is important for writing formulas. Therefore, only export the variables indicated for this report as the presence of additional variables may cause the formulas provided in this document to yield inaccurate results.*

***Tip:*** *assessment information is stored with the Program that completed the assessment. Be sure to select all programs that may have completed an assessment on DHIP youth, such as Access/Intake departments or other programs the youth may have transferred between.*

Export Variables

Client Demographics:

**Client Primary ID**

Caregiver(s) Demographics:

**Caregiver Customer Entered ID**

Assessment(s) Info:

**Assessment Date**

**Assessment Administration Type**

**CAFAS Total Score**

**Difference in Total Score**

1. **Complete the Export Request**

***Tip:*** *Click the blue “Export” button located towards the left at the bottom of the screen.*

1. **Download the file**

***Tip:*** *Completing the Export Request will take you to the “Export Requests” page which will show the status of the export request you just completed (as well as any other requests you have completed within the previous 24 hours). The status will initially show as “Pending” and then “In Process.” Completing the request will likely take a few minutes. If you navigate away from the Export Requests page the status will update each time you return. Otherwise, click “Refresh Status” to check the progress. When the file is ready the status will change to “Completed” in bold green font and a link to “Download Files” will appear next to it. Clicking on this link will take you to another screen where your file will appear as CAFAS Export Data CSV (.csv). Click this link and follow your web browser’s instructions for downloading and saving the file.*

## Step 2: Creating the Report in Excel

1. **Open the export file in Microsoft® Excel**

***Tip:*** *This can be done either by opening the file create in the steps above (it should open into Excel by default) or opening Excel, going to the Office Button menu in the upper left corner, choosing Open, and then directing Excel to the location of the file.*

1. **Create variables for the report**

***Tip:*** *Variable names appear as headers at the top of each column*

* 1. Locate the last CaregiverID variable and insert new columns to the right until the variable CAFAS\_E1TInitial\_assessDate is in column Q.

***Tip:*** *Depending on the maximum number of Caregivers listed for a youth, your export file will have columns Caregiver1ID, Caregiver2ID,Caregiver3ID, etc. Inserting columns until the variable listed above appears in column Q allows for programs to have up to 10 caregivers entered for a youth and for copying and pasting of the formulas supplied below without having to adjust for cell locations. As most programs will not have ten caregivers listed, it is likely this step will create some blank columns in your spreadsheet which can be ignored.*

***Tip:*** *Columns can be inserted by highlighting the entire column to the right of the location for the new column, right-clicking the mouse and choosing “Insert” OR going to Home on the menu bar and then choosing Insert and Insert Sheet Columns from the Cells option on the Toolbar. Once the first column is created, you can tap the F4 function key on your key board to repeat this action as many times as needed.*

* 1. Type the variable names below into the header for the corresponding columns:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| L | M | N | O | P |
| DHIP FY14 | Last CAFAS Date | Initial Total Score | Last Total Score | Total Score Difference |

* 1. In the cell below each column header (Row 2), enter the following formulas. Then copy the formulas down each column into every row that contains client information (don’t copy down into blank rows.)

***Tip:*** *These formulas can be copied from this document and pasted into the Row 2 cells in the spreadsheet.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| L | M | N | O | P |
| DHIP FY14 | Last CAFAS Date | Initial Total Score | Last Total Score | Total Score Difference |
| =COUNTIF(B2:K2,"DHIPFY14") | =MAX(Q2:DDF2) | =IF(INDEX(Q2:DDF2,0,MATCH(M2,Q2:DDF2,0)+1)="Initial CAFAS",O2,IF(OR(O2="",P2=""),"",(O2+P2))) | =IF(INDEX(Q2:DDF2,0,MATCH(M2,Q2:DDF2,0)+2)="","",INDEX(Q2:DDF2,0,MATCH(M2,Q2:DDF2,0)+2)) | =IF(INDEX(Q2:DDF2,0,MATCH(M2,Q2:DDF2,0)+3)="","",INDEX(Q2:DDF2,0,MATCH(M2,Q2:DDF2,0)+3)) |

### *Optional Step: View cases to be included in report*

Go to the Home option in the menu bar (top of page) and select the Sort and Filter option from the Editing section of the toolbar. Choose Filter. Click the small downward arrow in cell L1 to open the filter criteria for the variable “DHIP FY14,” unselect “Select All” and select “1.” “OK” the criteria. Your spreadsheet will now display only the DHIP cases for FY14.

1. **Create a PivotTable to design and run the report** 
   1. Highlight columns L through P and open a PivotTable by going to the Insert menu option and selecting PivotTable from the Tables toolbar option. In the Create PivotTable pop-up menu choose the New Worksheet location option.
   2. Use the following specifications to build the report:

Report Filter

**DHIP FY14, Select “1”**

∑ Values

**Count of DHIP FY14**

**Average of Initial Total Score**

**Average of Last Total Score**

**Average of Total Score Difference**

***Tip:*** The breakdown on completing step 4b.

When you complete step 4a a new window will open with a list of variables (aka “fields”) available for your report next to four areas labeled: Report Filter, Column Labels, Row Labels, and Values. You can drag and drop any of these variables into any of the four areas.

* When you drag the “DHIP FY14” variable into the Report Filter area, it will appear in cell A1 over to the right in the PivotTable spreadsheet. In the next cell, B1, it will say “(All)” and show a little downward pointing arrow. Click on the arrow and select “1” from the list of options that pops up. This will restrict your report to only DHIP cases for FY14.
* Drag and drop the variables DHIP FY14, Initial Total Score, Last Total Score, and Total Score Difference into the Values area and they will each appear as a “Count of” summary. They will all appear in the PivotTable spreadsheet to the left with a summary number in the cell underneath each. For the variable DHIP FY14, this is the number you want to calculate as it says how many youth in the dataset are flagged as receiving DHIP in FY14.
* For each of the other variables in the Summary area (Initial Total Score, Last Total Score, Total Score Difference), click on the downward arrow next to each and a pop-up menu will appear. Select the last menu option “Value Field Settings.” In this pop-up box, choose Average from the “Summarize by” options and hit OK.

Results will appear similar to the PivotTable example report shown below. Information can be copied into a word-processing document along with PECFAS® results and submitted in accordance with reporting requirements.

|  |  |  |  |
| --- | --- | --- | --- |
| **Count of DHIP FY14** | **Average of Initial Total Score** | **Average of Last Total Score** | **Average of Total Score Difference** |
| 6 | 114 | 104 | 12.5 |

# Using Microsoft® Access to Create the PECFAS® DHIP Report

## Step 1: Exporting the data for use in Access

***Tip:*** *Within the FAS application, Data Export is an item on the Navigation Menu along the left side of the screen. Once in the Data Export screen, select “PECFAS” from the tabs along the top. To learn more about accessing and creating data exports, click the “Help” link found in the upper right corner of all screens within the FAS application and search for the document “Help: Data Export – PECFAS®.”*

1. **Specify the criteria for data to be exported.**

Export Client Records where

Date Type: **Date Assessed**

From: **10/1/2013**

To: **9/30/2014**

Radio button: **Export Only assessments in time frame**

Export Details

Export Type: **XML**

Current Case Status: **Both**

Client General Info

*Leave all fields blank*

Specific Client Info

*Leave all fields blank*

Service Area/Programs

**Choose all Programs containing DHIP youth assessments.**

***Tip:*** *Assessment Information is stored with the Program that completed the assessment. Be sure to select all programs that may have completed an assessment on DHIP youth, such as Access/Intake departments or other programs the youth may have transferred between.*

Export Variables

***Tip:*** *The variables indicated here are necessary for creating the report in Microsoft® Access. Additional variables may be exported if desired. The user may wish to simply select “All” at the top of the variable list box.*

Client Demographics:

**Client Primary ID**

Caregiver(s) Demographics:

**Caregiver Customer Entered ID**

Assessment(s) Info:

**Assessment Date**

**Assessment Administration Type**

**PECFAS Total Score**

**Difference in Total Score**

1. **Complete the Export Request**

***Tip:*** *Click the blue “Export” button located towards the left at the bottom of the screen.*

1. **Download the file**

Save to the filename “DHIP FY14 PECFAS.xml.”

***Tip:*** *Completing the Export Request will take you to the “Export Requests” page which will show the status of the export request you just completed (as well as any other requests you have completed within the previous 24 hours). The status will initially show as “Pending” and then “In Process.” Completing the request will likely take a few minutes. If you navigate away from the Export Requests page the status will update each time you return. Otherwise, click “Refresh Status” to check the progress. When the file is ready the status will change to “Completed” in bold green font and a link to “Download Files” will appear next to it. Clicking on this link will take you to another screen where your file will appear as PECFAS Export Data XML (.xml). Click this link and follow your web browser’s instructions for downloading and saving the file.*

## Step 2: Creating the PECFAS® DHIP Report within Microsoft® Access

***Tip:*** *The Help menu within the FAS application provides a useful document “FAS Outcomes™ - Using XML” found as a link under the heading “Import XML data into an ACCESS Database.” This document gives detailed step-by-step instructions with screenshots for importing PECFAS*® *data into Access.*

1. **Import the data into Microsoft® Access**
   1. Create a new Blank Database in Access with a File Name and location of your choosing.
   2. Select “External Data” from the menu bar

***Tip:*** *Menu buttons are on the very top of the page.*

* 1. Choose “XML File” from the toolbar

***Tip:*** *The Toolbar options appear underneath the menu bar.*

* 1. Use the Browse button to locate and select your *DHIP FY14 PECFAS.xml* file
  2. Choose “Structure and Data” Import Options and “OK” the import

1. **Prepare the data for analysis**
   1. Open the table “assessDetails : Table”
   2. Go to Design View

***Tip:*** *This is under the Home menu bar button and is the View option depicted by a pencil, ruler, and protractor.*

* 1. Change Data Types

***Tip:*** *To change Data Types, highlight the variable listed under Field Name and then select the Data Type from the dropdown menu that appears when you click on the current Data Type.*

|  |  |
| --- | --- |
| **Field Name** | **Data Type** |
| Assessment\_Date | *Date/Time* |
| PECFAS\_Total\_Score | *Number* |
| Difference\_in\_Total\_Score | *Number* |

* 1. Save the changes and close the table

***Tip:*** *Ignore the warning that some data may be lost.*

1. **Create the report**
   1. Choose “Create” from the top menu bar and “Query Design” from the toolbar underneath
   2. Close the “Show Table” pop-up
   3. Under the Design menu, choose “SQL View” *(View tool button on the far left)*
   4. Copy and paste the following syntax into the SQL query design window.

*Tip: Paste over the automatically generated SELECT; prompt if it appears when the window opens.*

SELECT TOP 1 (select count(\*) FROM ((assessDetails AS details INNER JOIN (SELECT assessDetails.id1, MAX(assessDetails.Assessment\_Date) AS maxDate FROM assessDetails GROUP BY assessDetails.id1) AS maxAssessment ON (details.id1 = maxAssessment.id1) AND (details.Assessment\_Date = maxAssessment.maxDate)) INNER JOIN subscaleInfo ON details.assessmentID = subscaleInfo.assessmentID) INNER JOIN caregiver ON details.id1 = caregiver.id1 WHERE ((([caregiver]![cgID])="DHIPFY14"))) AS [# FY14 DHIP PECFAS Youth], (select avg(Iif (details.assessment\_administration\_type = 'Initial PECFAS', details.PECFAS\_Total\_score, ([PECFAS\_Total\_Score])+([Difference\_in\_Total\_Score]))) FROM ((assessDetails AS details INNER JOIN (SELECT assessDetails.id1, MAX(assessDetails.Assessment\_Date) AS maxDate FROM assessDetails GROUP BY assessDetails.id1) AS maxAssessment ON (details.id1 = maxAssessment.id1) AND (details.Assessment\_Date = maxAssessment.maxDate)) INNER JOIN subscaleInfo ON details.assessmentID = subscaleInfo.assessmentID) INNER JOIN caregiver ON details.id1 = caregiver.id1

WHERE ((([caregiver]![cgID])="DHIPFY14"))

) AS [Average Initial Total Score], Avg([PECFAS\_Total\_Score]) AS [Average Last Total Score], (select avg(Difference\_in\_Total\_Score) FROM ((assessDetails AS details INNER JOIN (SELECT assessDetails.id1, MAX(assessDetails.Assessment\_Date) AS maxDate FROM assessDetails GROUP BY assessDetails.id1) AS maxAssessment ON (details.id1 = maxAssessment.id1) AND (details.Assessment\_Date = maxAssessment.maxDate)) INNER JOIN subscaleInfo ON details.assessmentID = subscaleInfo.assessmentID) INNER JOIN caregiver ON details.id1 = caregiver.id1

WHERE ((([caregiver]![cgID])="DHIPFY14"))

and Difference\_in\_Total\_Score is not null) AS [Average Improvement]

FROM ((assessDetails AS details INNER JOIN (SELECT assessDetails.id1, MAX(assessDetails.Assessment\_Date) AS maxDate FROM assessDetails GROUP BY assessDetails.id1) AS maxAssessment ON (details.Assessment\_Date = maxAssessment.maxDate) AND (details.id1 = maxAssessment.id1)) INNER JOIN subscaleInfo ON details.assessmentID = subscaleInfo.assessmentID) INNER JOIN caregiver ON details.id1 = caregiver.id1

WHERE ((([caregiver]![cgID])="DHIPFY14"));

* 1. Run the Query

***Tip:*** *The Run command is indicated by a red exclamation point in the Design toolbar*

Results will appear similar to the Query table below. Information can be copied into a word-processing document along with CAFAS® results and submitted in accordance with reporting requirements.

| **Query1** | | | |
| --- | --- | --- | --- |
| **# FY14 DHIP PECFAS Youth** | **Average Initial Total Score** | **Average Last Total Score** | **Average Improvement** |
| 6 | 114 | 104 | 12.5 |

### *Optional:* Creating a master list of cases

To create a master list of DHIP PECFAS® cases with individual case scores (for internal agency use), save the outcomes query completed in the step above and repeat steps a, b and c under “Create the Report.” For this report, copy and paste the following SQL syntax:

SELECT details.id1 AS [Client ID], caregiver.cgID, details.PECFAS\_Total\_Score AS [FY14 Last PECFAS Total Score], IIf([details].[assessment\_administration\_type]='Initial PECFAS',[details].[PECFAS\_Total\_score],([PECFAS\_Total\_Score])+([Difference\_in\_Total\_Score])) AS [Initial Total Score], details.Difference\_in\_Total\_Score AS Improvement, details.Assessment\_Date AS [Last Assessment Date], details.Assessment\_Administration\_Type AS [Last Administration]

FROM ((assessDetails AS details INNER JOIN (SELECT assessDetails.id1, MAX(assessDetails.Assessment\_Date) AS maxDate FROM assessDetails GROUP BY assessDetails.id1) AS maxAssessment ON (details.Assessment\_Date = maxAssessment.maxDate) AND (details.id1 = maxAssessment.id1)) INNER JOIN subscaleInfo ON details.assessmentID = subscaleInfo.assessmentID) INNER JOIN caregiver ON details.id1 = caregiver.id1

WHERE ((([caregiver]![cgID])="DHIPFY14"))

ORDER BY details.id1;

Run the Query and results will appear like the example shown below.

| **Query1** | | | | | | |
| --- | --- | --- | --- | --- | --- | --- |
| **Client ID** | **cgID** | **FY14 Last PECFAS Total Score** | **Initial Total Score** | **Improvement** | **Last Assessment Date** | **Last Administration** |
| 003 | DHIPFY14 |  |  |  | 6/14/2013 | 15 Months |
| 004 | DHIPFY14 | 110 | 120 | 10 | 3/12/2013 | 6 Months - Q2 |
| 002 | DHIPFY14 | 90 | 100 | 10 | 6/27/2013 | 18 Months |
| 005 | DHIPFY14 | 130 | 140 | 10 | 6/26/2013 | 3 Months - Q1 |
| 006 | DHIPFY14 | 70 | 70 |  | 6/27/2013 | Initial PECFAS |
| 001 | DHIPFY14 | 120 | 140 | 20 | 5/28/2013 | 27 Months |

# Using Microsoft® Excel to Create the PECFAS® DHIP Report

## Step 1: Exporting the Data

***Tip:*** *Within the FAS application, Data Export is an item on the Navigation Menu along the left side of the screen. Once in the Data Export screen, select “CAFAS” from the tabs along the top. To learn more about accessing and creating data exports, click the “Help” link found in the upper right corner of all screens within the FAS application and search for the document “Help: Data Export – CAFAS*®*.”*

1. **Specify the criteria for data to be exported.**

Export Client Records where

Date Type: **Date Assessed**

From: **10/1/2013**

To: **9/30/2014**

Radio button: **Export Only assessments in time frame**

Export Details

Export Type: **CSV**

Current Case Status: **Both**

Client General Info

*Leave all fields blank*

Specific Client Info

*Leave all fields blank*

Service Area/Programs

**Choose all Programs containing DHIP youth assessments.**

***Tip:*** *Because Microsoft® Excel works with data in a flat data file, the location of variables within a spreadsheet is important for writing formulas. Therefore, only export the variables indicated for this report as the presence of additional variables may cause the formulas provided in this document to yield inaccurate results.*

***Tip:*** *Assessment Information is stored with the Program that completed the assessment. Be sure to select all programs that may have completed an assessment on DHIP youth, such as Access/Intake departments or other programs the youth may have transferred between.*

Export Variables

Client Demographics:

**Client Primary ID**

Caregiver(s) Demographics:

**Caregiver Customer Entered ID**

Assessment(s) Info:

**Assessment Date**

**Assessment Administration Type**

**PECFAS Total Score**

**Difference in Total Score**

1. **Complete the Export Request**

***Tip:*** *Click the blue “Export” button located towards the left at the bottom of the screen.*

1. **Download the file**

***Tip:*** *Completing the Export Request will take you to the “Export Requests” page which will show the status of the export request you just completed (as well as any other requests you have completed within the previous 24 hours). The status will initially show as “Pending” and then “In Process.” Completing the request will likely take a few minutes. If you navigate away from the Export Requests page the status will update each time you return. Otherwise, click “Refresh Status” to check the progress. When the file is ready the status will change to “Completed” in bold green font and a link to “Download Files” will appear next to it. Clicking on this link will take you to another screen where your file will appear as CAFAS Export Data CSV (.csv). Click this link and follow your web browser’s instructions for downloading and saving the file.*

## Step 2: Creating the Report

1. **Open the export file in Microsoft® Excel**

***Tip:*** *This can be done either by opening the file create in the steps above (it should open into Excel by default) or opening Excel, going to the Office Button menu in the upper left corner, choosing Open, and then directing Excel to the location of the file.*

1. **Create variables for the report**

***Tip:*** *Variable names appear as headers at the top of each column*

* 1. Locate the last CaregiverID variable and insert new columns to the right until the variable PECFAS\_E1TInitial\_assessDate is in column Q.

***Tip:*** *Depending on the maximum number of Caregivers listed for a youth, your export file will have columns Caregiver1ID, Caregiver2ID,Caregiver3ID, etc. Inserting columns until the variable listed above appears in column Q allows for programs to have up to 10 caregivers entered for a youth and for copying and pasting of the formulas supplied below without having to adjust for cell locations. As most programs will not have ten caregivers listed, it is likely this step will create some blank columns in your spreadsheet which can be ignored.*

***Tip:*** *Columns can be inserted by highlighting the entire column to the right of the location for the new column, right-clicking the mouse and choosing “Insert” OR going to Home on the menu bar and then choosing Insert and Insert Sheet Columns from the Cells option on the Toolbar. Once the first column is created, you can tap the F4 function key on your key board to repeat this action as many times as needed.*

* 1. Type the variable names below into the header for the corresponding columns:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| L | M | N | O | P |
| DHIP FY14 | Last PECFAS Date | Initial Total Score | Last Total Score | Total Score Difference |

* 1. In the cell below each column header (Row 2), enter the following formulas. Then copy the formulas down each column into every row that contains client information (don’t copy down into blank rows.)

***Tip:*** *These formulas can be copied from this document and pasted into the Row 2 cells in the spreadsheet.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| L | M | N | O | P |
| DHIP FY14 | Last PECFAS Date | Initial Total Score | Last Total Score | Total Score Difference |
| =COUNTIF(B2:K2,"DHIPFY14") | =MAX(Q2:DDF2) | =IF(INDEX(Q2:DDF2,0,MATCH(M2,Q2:DDF2,0)+1)="Initial PECFAS",O2,IF(OR(O2="",P2=""),"",(O2+P2))) | =IF(INDEX(Q2:DDF2,0,MATCH(M2,Q2:DDF2,0)+2)="","",INDEX(Q2:DDF2,0,MATCH(M2,Q2:DDF2,0)+2)) | =IF(INDEX(Q2:DDF2,0,MATCH(M2,Q2:DDF2,0)+3)="", "",INDEX(Q2:DDF2,0,MATCH(M2,Q2:DDF2,0)+3)) |

### *Optional Step: View cases to be included in report*

Go to the Home option in the menu bar (top of page) and select the Sort and Filter option from the Editing section of the toolbar. Choose Filter. Click the small downward arrow in cell L1 to open the filter criteria for the variable “DHIP FY14,” unselect “Select All” and select “1.” “OK” the criteria. Your spreadsheet will now display only the DHIP cases for FY14.

1. **Create a PivotTable to design and run the report** 
   1. Highlight columns L through P and open a PivotTable by going to the Insert menu option and selecting PivotTable from the Tables toolbar option. In the Create PivotTable pop-up menu choose the New Worksheet location option.
   2. Use the following specifications to build the report:

Report Filter

**DHIP FY14, Select “1”**

∑ Values

**Count of DHIP FY14**

**Average of Initial Total Score**

**Average of Last Total Score**

**Average of Total Score Difference**

***Tip:*** The breakdown on completing step 4b.

When you complete step 4a a new window will open with a list of variables (aka “fields”) available for your report next to four areas labeled: Report Filter, Column Labels, Row Labels, and Values. You can drag and drop any of these variables into any of the four areas.

* When you drag the “DHIP FY14” variable into the Report Filter area, it will appear in cell A1 over to the right in the PivotTable spreadsheet. In the next cell, B1, it will say “(All)” and show a little downward pointing arrow. Click on the arrow and select “1” from the list of options that pops up. This will restrict your report to only DHIP cases for FY14.
* Drag and drop the variables DHIP FY14, Initial Total Score, Last Total Score, and Total Score Difference into the Values area and they will each appear as a “Count of” summary. They will all appear in the PivotTable spreadsheet to the left with a summary number in the cell underneath each. For the variable DHIP FY14, this is the number you want to calculate as it says how many youth in the dataset are flagged as receiving DHIP in FY14.
* For each of the other variables in the Summary area (Initial Total Score, Last Total Score, Total Score Difference), click on the downward arrow next to each and a pop-up menu will appear. Select the last menu option “Value Field Settings.” In this pop-up box, choose Average from the “Summarize by” options and hit OK.

Results will appear similar to the PivotTable example report shown below. Information can be copied into a word-processing document along with CAFAS® results and submitted in accordance with reporting requirements.

|  |  |  |  |
| --- | --- | --- | --- |
| **Count of DHIP FY14** | **Average of Initial Total Score** | **Average of Last Total Score** | **Average of Total Score Difference** |
| 6 | 114 | 104 | 12.5 |