

---

# CHAPTER 5

## AGENCIES & NPR REPORTS

### Contents

<b>Agency .....</b>	<b>5-1</b>
I. AGENCIES .....	5-1
A. View Existing Agencies Within the State .....	5-1
B. Add an Agency .....	5-2
C. Edit an Agency .....	5-3
D. Inactivate an Agency Listing .....	5-4
E. Delete an Agency Listing .....	5-4
II. SUB-STATE REGIONS .....	5-4
A. Add a Sub-State Region .....	5-4
B. View, Edit, or Delete a Sub-State Region Listing .....	5-6
C. Inactivate a Sub-State Region Listing .....	5-6
<b>NPR Reports .....</b>	<b>5-6</b>
What are the different types of NPR reports? .....	5-6
Who can run NPR reports? .....	5-7
How are Sub-State Region reports different from other summary reports? .....	5-7
Who can run Sub-State Region reports? .....	5-7
<b>Sub-State Regions for Reporting Purposes .....</b>	<b>5-8</b>
A. View an Existing Sub-State Region for Reporting Purposes .....	5-8
B. Add a Sub-State Region for Reporting Purposes .....	5-8
C. Edit a Sub-State Region for Reporting Purposes .....	5-11
D. Delete a Sub-State Region for Reporting Purposes .....	5-11
<b>Client Contact Summary Reports .....</b>	<b>5-11</b>
Instructions to Run a Client Contact Summary Report .....	5-12
Types of Client Contact Summary Reports .....	5-12
<b>Public and Media (PAM) Activity Summary Reports .....</b>	<b>5-14</b>
Instructions to Run a PAM Summary Report .....	5-15
Types of PAM Summary Reports .....	5-15

## Agency

This chapter explains the various functionalities under the “Agency” tab in the SHIP NPR website (<https://shipnpr.shiptalk.org>). These functionalities include creating and managing listings for agencies and sub-state regions within a state.

### I. AGENCIES

Once you log in to the SHIP NPR website, click on the light blue “Agency” button at the top of the screen. This directs you to the “Find an Agency” screen. Only SHIP Directors and state administrators can access the “Agency” tab. If you receive an “unauthorized access” message when you click on the tab, you do not have the necessary level of permissions.

The “Find an Agency” screen allows you to complete the following tasks:

- A. [View Existing Agencies Within the State](#)
- B. [Add an Agency](#)
- C. [Edit an Agency](#)
- D. [Inactivate an Agency Listing](#)
- E. [Delete an Agency Listing](#)

#### A. View Existing Agencies Within the State

Once you log in to the SHIP NPR website, click on the light blue “Agency” button at the top of the screen. This directs you to the “Find an Agency” screen.

Administrators can view an alphabetical list of all agencies within the state by clicking on the “List all Agencies” link on the right side of the screen. Alternatively, the search box allows administrators to search for an agency by using keywords (e.g., aging) in the agency’s name. In addition to the agency’s name, the following information displays:

- Agency type (e.g., referral telephone line)
- Address
- Telephone number and hours (if available)

Administrators can click on “View” for additional details including active counties, service areas, contact information for the agency director, and the website address.

## B. Add an Agency

**Register a new Agency**

(Items marked in \* indicate required fields.)

\* State:

\* Agency Name:

\* Agency Type:

\* Service Areas:

Counties		Service Areas
Allegany	>>	Baltimore
Anne Arundel		
Calvert	<<	
Caroline		
Carroll		
Cecil		
Charles		
Dorchester		
Frederick		

### Instructions for Administrators: Add an Agency

1. Once you log in to the SHIP NPR website, click on the light blue “Agency” button at the top of the screen. This directs you to the “Find an Agency” screen.
2. Click on the link to “Add an Agency” located at the upper right hand side of the screen. Use the following instructions to register a new agency within their state. An item marked with an \* indicates a required field.

**State** – This field is pre-populated to display your state.

**Agency Name** – Enter the name of the agency into the box.

**Agency Type** – Use the dropdown list to select one of the following options:

- Statewide call center
- Information and referral phone line
- Other call center
- Other statewide operations and activities
- Sub-state regional office
- Local agency

**Service Areas** – This field allows you to select which counties are served by the agency. The “Counties” box located on the left will display all the counties within your state. In this box, locate the county that is served by the agency and click on it to highlight the name. Click on the >> button to move the highlighted county into the “Service Areas” box on the right. Repeat this process for all counties served by the new agency. To select multiple counties at once, press the “Ctrl” button on your keyboard before clicking on the

names of the desired counties. If you accidentally select and move a county into the “Service Areas” box, you can undo it by clicking on the county to highlight it, and clicking on the << button.

***Physical Address (REQUIRED)*** – Enter the address of the agency office into the corresponding boxes.

***Mailing Address (REQUIRED)*** – If the agency’s mailing address is the same as its physical address, click on the “same as physical address” box. If the agency’s mailing address is different than its physical address, enter the mailing address into the corresponding boxes.

***Contact Person (REQUIRED)*** – Enter the first name, last name, and title of the agency’s contact person (e.g., agency director or administrator) into the corresponding boxes.

***Hours of Operation*** – Enter the hours of operation for the agency.

***Primary Phone (REQUIRED)*** – Enter a phone number that individuals may use to contact the agency.

***Secondary Phone*** – Enter a second contact phone number, if available.

***Primary Email (REQUIRED)*** – Enter an email address that individuals may use to contact the agency.

***Secondary Email*** – Enter a second contact email address, if available.

***Toll Free Phone*** – Enter a toll free phone number for the agency, if available.

***TDD*** – Enter the TTD or TTY device number, if available.

***Toll Free TDD*** – Enter the toll free TTD or TTY device number, if available.

***Fax*** – Enter the agency’s fax number.

***Website URL*** – Enter the agency’s website address, if available.

***Comments*** – You may include relevant information about the agency and its services.

***Hide Agency From Public*** – If you do not wish to share the agency’s information with the public, click the box next to “Hide Agency From Public”.

3. Once you have completed the agency registration form, click the “Submit” button at the bottom of the screen to save the agency’s information.
4. A success message will display stating, “Success! This Agency has been successfully added.” The details of the newly created agency will display underneath the success message. Below the agency name, you will see an “Edit” button that you can use to modify the agency’s information, as well as a “Delete” button that you can use to delete the agency’s information.

## C. Edit an Agency

To edit an agency, locate the agency using the instruction in [View Existing Agencies Within the State](#). Once you locate the agency, click “Edit” next to the agency to be directed to the agency listing. After you make changes to the agency information, scroll to the bottom of the page and

click “Submit” to save your changes. A message will appear at the top of the page that says “Success! This Agency has successfully been edited.”

## **D. Inactivate an Agency Listing**

To inactivate an agency, locate the agency using the instructions in [View Existing Agencies Within the State](#). Once you locate the agency, click “Edit” next to the agency to be directed to the agency listing. Click in the “Is Active” box to uncheck it. Scroll to the bottom of the page and click “Submit” to save your changes. A message will appear at the top of the page that says “Success! This Agency has successfully been edited.”

Changing the status of an agency to “inactive” does not delete the agency’s information from SHIP NPR, but will prevent users from registering at the site.

## **E. Delete an Agency Listing**

To delete an agency, locate the agency using the instruction in [View Existing Agencies Within the State](#). Once you locate the agency, click on “View” to display the agency’s information. At the right side of the screen, you will see an “Edit” and a “Delete” button. Upon clicking on the “Delete” button, you will see a message that says “Are you sure you would like to delete this agency and all of its locations?” Select “Yes” to delete the agency. Deleting an agency listing will delete the agency’s listing in the SHIP NPR website.

# **II. SUB-STATE REGIONS**

A sub-state region consists of a grouping of specific agencies within a state. Sub-state regions may be physical offices that oversee a group of agencies within a particular geographic area, or an administrative grouping of agencies created by the SHIP Director and state administrators to help with management and oversight of those agencies. The “Agency” section of the SHIP NPR website allows administrators to manage their state’s sub-state regions.

Once you log in to the SHIP NPR website, click on the light blue “Agency” button at the top of the screen. This directs you to the “Find an Agency” screen. Only SHIP Directors and state administrators can access the “Agency” tab. If you receive an “unauthorized access” message when you click on the tab, you do not have the necessary level of permissions.

The “Find an Agency” screen allows you to complete the following tasks:

- A. [Add a Sub-State Region](#)
- B. [View, Edit, or Delete a Sub-State Region](#)
- C. [Inactivate a Sub-State Region Listing](#)

## **A. Add a Sub-State Region**

SHIP Directors and state administrators may wish to create or designate sub-state regions for their state. Adding a sub-state region within the “Agency” tab creates a sub-state agency to which individuals can register as a user and report information on the Client Contact (CC) and Public and Media (PAM) Activity forms.



Adding a sub-state region within the “Agency” tab of the SHIP NPR website is different than adding a sub-state region for reporting purposes within the “NPR Reports” tab, which is discussed in the section, [Add a Sub-State Region for Reporting Purposes](#). A sub-state region for reporting purposes allows you to run reports that aggregate Client Contact or PAM forms for the sub-state regions that you created.

## Add a Sub-State Region

(Items marked in \* indicate required fields.)

State:

\* Sub-State Region Name:

\* Sub-State Region Agencies:

Agencies

- Allegany County Hun
- Anne Arundel County
- Baltimore City Health
- Baltimore County De
- Calvert County Office
- Carroll County Burea
- Cecil County Aging S
- Charles County Agin
- Frederick County De
- Garrett County Area

>>

<<

Sub-State Region Agencies

### Sub-State Regions

Name	State	
Test MD Sub-State Region	Maryland	<a href="#">View</a>   <a href="#">Edit</a>

### Instructions for Administrators: Add a Sub-State Region

- Once you log in to the SHIP NPR website, click on the light blue “Agency” button at the top of the page. This directs you to the “Find an Agency” screen.
- Click on the link to “Add a Sub-State Region” located at the upper right hand side of the screen. Any sub-state regions that already exist for your state will be displayed at the bottom of the following screen. Use the following instructions to add a new sub-state region.

**State** – This field is pre-populated to display your state.

**Sub-State Region Name** – Assign a name to the sub-state region.

**Sub-State Region Agencies** – This field allows you to select which agencies you want to include in the sub-state region. The “Agencies” box on the left will display all the agencies within your state. In this box, locate the first agency you wish to include in the new sub-state region and click on it to select it. Click on the >> button to move the highlighted agency into the “Sub-State Region Agencies” box on the right. Repeat this process for the other agencies you wish to include in the new sub-state region. To select multiple agencies at once, press the “Ctrl” button on your keyboard before clicking on the

names of the desired agencies. If you accidentally select and move an agency into the “Sub-State Region Agencies” box, you can undo it by clicking on the agency to highlight it, and clicking on the << button.

3. When all desired agencies have been added to the “Sub-State Region Agencies” box, click the “Submit” button.
4. A success message will display stating, “Success! This Sub-State Region has been successfully added.” The details of the newly created sub-state region, such as the names of the agencies it comprises, will display underneath the success message. You will see an “Edit” button that you can use to make modifications to the sub-state region, as well as a “Delete” button that you can use to delete the sub-state region.

## **B. View, Edit, or Delete a Sub-State Region Listing**

Once you log in to the SHIP NPR website, click on the light blue “Agency” button at the top of the page. This directs you to the “Find an Agency” screen. Click on the link to “Add a Sub-State Region” located on the upper right hand side of the screen. Any sub-state regions that already exist for your state will be displayed at the bottom of the following screen. Click “Edit” next to a region name to edit that sub-state region, and click “Submit” to save your changes. Click “View” next to a region name to view the details of that sub-state region.

If you click on “View”, you will also see “Edit” and “Delete” buttons on the following screen that displays the details of the sub-state region. You may use these buttons to edit or delete the region as necessary.

## **C. Inactivate a Sub-State Region Listing**

To inactivate a sub-state region, locate the sub-state region using the instructions in [View, Edit, or Delete a Sub-State Region Listing](#). Once you locate the sub-state region, click “Edit” next to the region’s name to be directed to the sub-state region’s listing. Click in the “Is Active” box to uncheck it. Scroll to the bottom of the page and click “Submit” to save your changes. A message will appear at the top of the page that says “Success! This Sub-State Region has successfully been edited.”

Changing the status of a sub-state region to “inactive” does not delete the sub-state region’s information from SHIP NPR, but will prevent users from registering at the site.

## **NPR Reports**

This chapter explains the various functionalities under the “SHIP NPR Reports” tab in the SHIP NPR website (<https://shipnpr.shiptalk.org>). These functionalities include using NPR reports, such as the Client Contact, PAM, and Sub-State Region summary reports.

### **What are the different types of NPR reports?**

Summary reports provide aggregate-level data from Client Contact or Public and Media (PAM) Activity forms that were submitted into the SHIP NPR website.

- A Client Contact summary report displays a cumulative report on client contacts made within a specific time period, organized by agency, county, ZIP code, counselor, submitter, sub-state region, or state.
- A PAM summary report displays a cumulative report for all PAM events held within a specific time period, organized by agency, county, ZIP code, presenter/contributor, submitter, sub-state region, or state.
- A Sub-State Region report is a type of summary report that provides an aggregated count of Client Contact or PAM forms for specific predetermined areas within a state, such as a group of counties, ZIP codes, or agencies.

### **Who can run NPR reports?**

All users can run NPR reports. However, an individual's user role and level of permissions will determine which types of NPR reports he/she can run. For example, an agency user may be able to run reports only on the forms he or she entered. An agency administrator may be able to run reports on all forms entered by individuals at the agency. SHIP Directors and state administrators can run statewide reports and reports on forms entered by individuals, agencies or sub-state regions.

### **How are Sub-State Region reports different from other summary reports?**

A Sub-State Region report displays a summary report of Client Contact or PAM forms for predetermined groupings within a state, such as groupings of counties, ZIP codes, or agencies. Sub-State Region reporting provides a level of geographic reporting between the existing state-level summary reports and the summary reports based on single agencies, counties, or ZIP codes. While Sub-State Region reports resemble the Client Contact and PAM summary reports, they contain specific information from groupings of agencies, counties, or ZIP codes. For example, a single Sub-State Region report can contain client contact information from multiple agencies. While this information can be obtained by running individual client contact reports for each agency and manually adding the totals, the Sub-State Region Report allows a user to obtain this information more easily.

### **Who can run Sub-State Region reports?**

Only SHIP directors and state administrators are able to run Sub-State Region reports.



## Sub-State Regions for Reporting Purposes

A sub-state region for reporting purposes under the “NPR Reports” tab is different from a sub-state region that was created within the “Agency” tab of the SHIP NPR website. A sub-state region for reporting purposes allows you to run summary reports that aggregate Client Contact or PAM forms for the sub-state region for reports that you created. Adding a sub-state region within the “Agency” tab creates a sub-state agency office listing for which users can register themselves and report forms.

Once you log in to the SHIP NPR website, click on the light blue “NPR Reports” button at the top of the screen. Next, click on the “Create a Sub State Region for Reporting Purposes” link at the right of the screen. This directs you to a screen titled “List of Sub State Region for Report”.

Name	Type	
<a href="#">Test for NPR Manual</a>	County Of Event	<a href="#">View</a>   <a href="#">Edit</a>
<a href="#">test1</a>	ZIP Code Of Client Residence	<a href="#">View</a>   <a href="#">Edit</a>
<a href="#">test90</a>	County Of Counselor Location	<a href="#">View</a>   <a href="#">Edit</a>

1

This screen allows you to complete the following tasks:

- A. [View an Existing Sub-State Region for Reporting Purposes](#)
- B. [Add a Sub-State Region for Reporting Purposes](#)
- C. [Edit a Sub-State Region for Reporting Purposes](#)
- D. [Delete a Sub-State Region for Reporting Purposes](#)

### A. View an Existing Sub-State Region for Reporting Purposes

Once you log in to the SHIP NPR website, click on the light blue “NPR Reports” button at the top of the screen. Next, click on the “Create a Sub State Region for Reporting Purposes” link at the right of the screen. Any sub-state regions for reports that were created for your state will display on this page. If your state has many sub-state regions for reports, you may need to use the page numbers at the bottom of the page to scroll through the list. Click “View” next to the desired sub-state region for reports to view its details. If there are no sub-state regions for reports on this page, none were created for your state.

### B. Add a Sub-State Region for Reporting Purposes

Once you log in to the SHIP NPR website, click on the light blue “NPR Reports” button at the top of the screen. Next, click on the “Create a Sub State Region for Reporting Purposes” link at the right of the screen.

To create a new sub-state region for reports, click on the link titled “Add a Sub State Region for Report”. This link is located on the upper right hand side of the webpage. This directs you to a

screen titled “Add a new Sub State Region For Report”. Use the instructions below to complete the fields on this screen and create a new sub-state region for reporting purposes.

### ***State***

This field is pre-populated to display your state.

### ***Form Type (REQUIRED)***

Indicate whether the sub-state region for reporting purposes that you create will be used to run reports on counts of either Client Contact forms or PAM forms. If you want to run sub-state region reports for both Client Contact and PAM forms, you must add a separate report for each form type.

### ***Group Type (REQUIRED)***

Use the dropdown list to specify how you will create groupings within the sub-state region for reporting purposes. The options that display in the dropdown list will depend on the form type you previously selected.

If you selected “Client Contact Form” as the form type, the following options will display:

- County Code of Client Residence
- ZIP Code of Counselor Location
- County of Counselor Location
- ZIP Code of Client Residence
- Agency

If you selected “Public Media Event Form” as the form type, the following options will display:

- County of Event
- PAM Agency

For example, if you want to run sub-state reports on Client Contact forms entered only by agencies designated as call centers, you would select the “Client Contact Form” as form type and then select the “Agency” option as group type. In later steps, you will be able to designate which agencies you wish to include in the sub-state region for reporting.

***Sub-State Region Report Name (REQUIRED)***

Enter a name for the region that you will recognize when running summary reports for this sub-state region.

***Sub-State Region Service Entity Code***

You may use this optional field to designate a code for the sub-state region to help identify the region when running summary reports.

For example, some states use short codes (e.g., Region 1) in addition to a longer name (e.g., Appalachian region). In this case, the state has the option of using “Region 1” or “1” as the sub-state region service entity code.

***Service Areas***

This field allows you to select which groups you want to include when running reports for this sub-state region for reporting purposes.

For example, if you selected “Agency” under the “Group Type” field, the box on the left will display all the agencies within your state. In the box on the left, locate the first agency you wish to include in the new sub-state region for reports, and click on it to select it. Next, you would click on the >> button to move the highlighted agency into the “Service Areas” box on the right. You would repeat this process for the remaining agencies you wish to include in the new sub-state region for reports. If you accidentally select and move an agency into the “Service Areas” box, you can undo it by highlighting the agency and clicking on the << button.

When all desired entities (e.g., agencies, counties, ZIP codes) are added to the “Service Areas” box, click “Submit” at the bottom of the screen. A success message will display stating, “Success! This Sub-state for Reporting has been successfully added.” The details of the newly created sub-state region for reports will display underneath the success message. The following links and buttons will also display on the screen:

- Edit: Use this *button* to make modifications to the newly-created sub-state region.
- Delete: Use this *button* to delete the newly-created sub-state region.
- Add a Sub State Region for Report: Use this *link* to create a new sub-state region for reports.
- Sub State Region for Report: Use this *link* to return to the “List of Sub State Region for Report” screen.

### C. Edit a Sub-State Region for Reporting Purposes

Once you log in to the SHIP NPR website, click on the light blue “NPR Reports” button at the top of the screen. Next, click on the “Create a Sub State Region For Reporting Purposes” link at the right of the screen. Any sub-state regions for reporting purposes that were created for your state will display on this page. If your state has many sub-state regions for reporting purposes, you may need to use the page numbers at the bottom of the page to scroll through the list to locate the desired listing. Click “Edit” next to the name of the sub-state region for reports that you wish to edit.

This directs you to a screen titled “Edit Sub State Region for Report”. Make the desired edits and click “Submit” at the bottom of the screen to save your changes. A success message will display stating, “Success! This Sub-state for Report has successfully been edited.” The details of the modified sub-state region for reports will display underneath the success message.

### D. Delete a Sub-State Region for Reporting Purposes

Use the instructions in [View an Existing Sub-State Region for Reports](#) to locate the listing you wish to delete and view its details. On the screen that displays the details of the sub-state region for reporting purposes, click the “Delete” button at the right hand side of the screen. A pop-up box will display that asks whether you would like to delete the listing. Click “Yes” to delete the sub-state region for reporting purposes and be directed to the list of the remaining sub-state regions for reports within your state.

## Client Contact Summary Reports

Once you log in to the SHIP NPR website, click on the light blue “NPR Reports” button at the top of the screen. This directs you to the main NPR Reports homepage. The dropdown list on this page lists the different options for creating Client Contact summary reports. The options that display in the dropdown list will depend on your level of permissions within the website. For example, SHIP Directors and state administrators will be able to run many more types of reports than an agency user.

The screenshot shows the SHIP NPR website interface. At the top is a navigation bar with buttons: Agency, User, EditMyProfile, RR, CC, PAM, Upload, SHIPProfile, NPRReports, and Logout. Below this is a main content area. On the right side of the main area, there are links for 'PAM Reports' and 'Sub State Region For Report'. On the left side, there is a label 'CC Report Type:' followed by a dropdown menu. The dropdown menu is open, showing a list of report types. The first two items are 'Select Report Type' (with a left arrow) and 'Select Report Type' (with a right arrow). The remaining items are:

- Contacts - By State - By Date of Contact
- Contacts - By Agency - By Date of Contact
- Contacts - By County of Counselor Location - By Date of Contact
- Contacts - By ZIP Code of Counselor Location - By Date of Contact
- Contacts - By County of Client Residence - By Date of Contact
- Contacts - By ZIP Code of Client Residence - By Date of Contact
- Contacts - By Counselor - By Date of Contact
- Contact Records Entered - By Submitter - By Date Initially Submitted (Date Entered)
- Contacts - By Reporting Substate Region Based on Agency Groupings - By Date of Contact
- Contacts - By Reporting Substate Region Based on Counties of Counselor Locations - By Date of Contact
- Contacts - By Reporting Substate Region Based on ZIP Codes of Counselor Locations - By Date of Contact
- Contacts - By Reporting Substate Region Based on Counties of Client Residence - By Date of Contact
- Contacts - By Reporting Substate Region Based on ZIP Codes of Client Residence - By Date of Contact

## Instructions to Run a Client Contact Summary Report

Use the following instructions when running any type of Client Contact summary report.

- **Report type:** Use the dropdown list to select a report type. The next section, [Types of Client Contact Summary Reports](#), describes the different report types and includes instructions on how and when to use each report type.
- **Date range:** After selecting a report type, select a date range for which you want to create the report. If the report type states “By Date of Contact”, the date range refers to the dates the client contacts occurred, not the date when the forms were entered into the SHIP NPR website. If the report type states “By Date Initially Submitted (Date Entered)”, the dates refer to the dates when the form was entered into the SHIP NPR website. Click on the calendar boxes to select start and end dates. You may also enter the dates directly into the boxes using the mm/dd/yyyy format.
- **Additional fields:** Certain report types may require that you fill out additional fields (e.g., agency, county, ZIP code). Instructions on how to complete these additional fields are described with the corresponding report types in the next section.
- **Submit:** Click “Submit” to generate the summary report. Click the “Printer Friendly Version” link in the upper right corner of the screen to view a version of the report that you can print.

## Types of Client Contact Summary Reports

### *Contacts – By State – By Date of Contact*

This report provides a state-level summary of all client contacts made during a specific time period. Only SHIP Directors and state administrators will have the option to run this report.

### *Contacts – By Agency – By Date of Contact*

This report provides an agency-level summary of all client contacts made during a specific time period. Only individuals with an agency administrator or higher level of permissions will have the option to run this report.

### *Contacts – By County of Counselor Location – By Date of Contact*

This report provides a summary of all client contacts made within a particular county in which the counseling service took place during a specific time period. Counselors can run this type of report on forms for which they are listed as the counselor. Individuals who are designated as data submitters can run this type of report on forms they submitted. Administrators (agency, sub-state, state) can run this report for regions they oversee.

### *Contacts – By ZIP Code of Counselor Location – By Date of Contact*

This report provides a summary of all client contacts made within a particular ZIP code in which the counseling took place during a specific time period. It does *not* generate reports based on the client’s ZIP code. Counselors can run this type of report on forms for which they are listed as the counselor. Individuals who are designated as data submitters can run this type of report on forms they submitted. Administrators (agency, sub-state, state) can run this report for regions they oversee.

***Contacts by County of Client Residence – By Date of Contact***

This report provides a summary of all client contacts made within a particular county of client residence during a specific time period. Counselors can run this type of report on forms for which they are listed as the counselor. Individuals who are designated as data submitters can run this type of report on forms they submitted. Administrators (agency, sub-state, state) can run this report for regions they oversee.

***Contacts – By ZIP Code of Client Residence – By Date of Contact***

This report provides a summary of all client contacts within a specific ZIP code of client residence during a specific time period. Counselors can run this type of report on forms for which they are listed as the counselor. Individuals who are designated as data submitters can run this type of report on forms they submitted. Administrators (agency, sub-state, state) can run this report for regions they oversee.

***Contacts – By Counselor – By Date of Contact***

This report creates a summary of all client contacts made by a specific SHIP counselor during a specific time period. Counselors can run this type of report on forms for which they are listed as the counselor. Individuals who are designated as data submitters can run this type of report on counselors whose forms they submitted. Administrators (agency, sub-state, state) can run this report for counselors within regions they oversee.

***Contact Records Entered – By Submitter – By Date Initially Submitted (Date Entered)***

This report creates a summary of all client contacts entered by a counselor or data submitter during a specific time period. The date range for this type of report refers to the dates when the forms were entered into the SHIP NPR website. Counselors and data submitters can run this type of report on forms they submitted. Administrators (agency, sub-state, state) can run this report on forms submitted within regions they oversee.

***Contacts – By Reporting Sub-State Region Based on Agency Groupings – By Date of Contact***

This report creates a summary of all client contacts entered during a specific time period, for a specific sub-state region for reporting purposes that was based on groupings of agencies. Only SHIP Directors and state administrators will have the option to run this report.

***Contacts – By Reporting Sub-State Region Based on Counties of Counselor Locations – By Date of Contact***

This report creates a summary of all client contacts entered during a specific time period, for a specific sub-state region for reporting that was based on groupings of counties of counselor locations. Only SHIP Directors and state administrators will have the option to run this report.

### ***Contacts – By Reporting Sub-State Region Based on ZIP Codes of Counselor Locations – By Date of Contact***

This report creates a summary of all client contacts entered during a specific time period, for a specific sub-state region for reporting that was based on groupings of ZIP codes of counselor locations. Only SHIP Directors and state administrators will have the option to run this report.

### ***Contacts – By Reporting Sub-State Region Based on Counties of Client Residence – By Date of Contact***

This report creates a summary of all client contacts entered during a specific time period, for a specific sub-state region for reporting that was based on groupings of counties of client residence. Only SHIP Directors and state administrators will have the option to run this report.

### ***Contacts – By Reporting Sub-State Region Based on ZIP Codes of Client Residence – By Date of Contact***

This report creates a summary of all client contacts entered during a specific time period, for a specific sub-state region for reporting that was based on groupings of ZIP codes of client residence. Only SHIP Directors and state administrators will have the option to run this report.

## **Public and Media (PAM) Activity Summary Reports**

Once you log in to the SHIP NPR website, click on the light blue “NPR Reports” button at the top of the screen. This directs you to the main NPR Reports homepage. Click the “PAM Reports” link at the right of the page. This directs you to a dropdown list that shows the different options for creating PAM summary reports. The options that display in the dropdown list will depend on your level of permissions within the website. For example, SHIP Directors and state administrators will be able to run many more types of reports than an agency user.

The screenshot shows the SHIP NPR website interface. At the top, there is a navigation bar with buttons: Agency, User, EditMyProfile, RR, CC, PAM, Upload, SHIPProfile, NPRReports, and Logout. Below this, on the left, is the label "PAM Report Type:". To the right of this label is a dropdown menu. The dropdown menu is open, showing a list of report types. The first two items are "Select Report Type" (with a left arrow) and "Select Report Type" (with a right arrow). The remaining items are:

- Activities-Events - By State - By Activity-Event Start Date
- Activities-Events - By Agency - By Activity-Event Start Date
- Activities-Events - By County of Event - By Activity-Event Start Date
- Activities-Events - By ZIP Code of Event - By Activity-Event Start Date
- Activities-Events - By Presenter-Contributor - By Activity-Event Start Date
- Activity-Event Records Entered - By Submitter - By Date Initially Submitted (Date Entered)
- Activities-Events - By Reporting Substate Region Based on Agency Groupings - By Activity-Event Start Date
- Activities-Events - By Reporting Substate Region Based on Counties of Event - By Activity-Event Start Date



## Instructions to Run a PAM Summary Report

Use the following instructions when running any type of Client Contact summary report.

- **PAM report type:** Use the dropdown list to select a report type. The next section, [Types of PAM Summary Reports](#), describes the different report types and includes instructions on how and when to use each report type.
- **Date range:** After selecting a report type, select a date range for which you want to create the report. If the report type states “By Activity-Event Start Date”, the date range refers to the date the PAM activity occurred, not the date when the forms were entered into the SHIP NPR website. If the report type states “By Date Initially Submitted (Date Entered)”, the dates refer to the dates when the PAM form was entered into the SHIP NPR website. Click on the calendar boxes to select start and end dates. You may also enter the dates directly into the boxes using the mm/dd/yyyy format.
- **Additional fields:** Certain report types may require that you fill out additional fields (e.g., agency, county, ZIP code). Instructions on how to complete these additional fields are described with the corresponding report types in the next section.
- **Submit:** Click “Submit” to generate the summary report. Click the “Printer Friendly Version” link in the upper right corner of the screen to view a version of the report that you can print.

## Types of PAM Summary Reports

### *Activities-Events – By State – By Activity-Event Start Date*

This report provides a state-level summary of all PAM activities that took place during a specific time period. Only SHIP Directors and state administrators will have the option to run this report.

### *Activities-Events – By Agency – By Activity-Event Start Date*

This report provides an agency-level summary of all PAM activities that took place during a specific time period. Only individuals with an agency administrator or higher level of permissions will have the option to run this report.

### *Activities-Events – By County of Event – By Activity-Event Start Date*

This report provides a summary of all PAM activities that took place within a particular county and during a specific time period. Individuals can run this type of report on PAM forms they submitted. Administrators (agency, sub-state, state) can run this report for regions they oversee.

### *Activities-Events – By ZIP Code of Event – By Activity-Event Start Date*

This report provides a summary of all PAM activities that took place within a particular ZIP code and during a specific time period. Individuals can run this type of report on PAM forms they submitted. Administrators (agency, sub-state, state) can run this report for regions they oversee.

### *Activities-Events – By Presenter-Contributor – By Activity-Event Start Date*

This report creates a summary of all PAM activities in which a particular individual is listed as a presenter or contributor, and that took place during a specific time period. Individuals can run



this type of report on PAM forms they submitted. Administrators (agency, sub-state, state) can run this report for regions they oversee.

***Activity-Event Records Entered – By Submitter – By Date Initially Submitted (Date Entered)***

This report creates a summary of all PAM forms entered by an individual during a specific time period. The date range for this type of report refers to the dates when the forms were entered into the SHIP NPR website. Counselors and data submitters can run this type of report on forms they submitted. Administrators (agency, sub-state, state) can run this report on forms submitted within regions they oversee.

***Activities-Events – By Reporting Sub-State Region Based on Agency Groupings – By Activity-Event Start Date***

This report creates a summary of all PAM activities that occurred within a specific sub-state region for reporting that was based on groupings of agencies, and that took place during a specific time period. Only SHIP Directors and state administrators will have the option to run this report.

***Activities-Events – By Reporting Sub-State Region Based on Counties of Event – By Activity-Event Start Date***

This report creates a summary of all PAM activities that occurred within a specific sub-state region for reporting that was based on groupings of counties, and that took place during a specific time period. Only SHIP Directors and state administrators will have the option to run this report.