Full Service Partnership (FSP) Partner-Level Data (PLD) Templates User Manual

Instructions for utilizing DCR data downloads to view partner-level information summaries

This document and associated templates were funded by the Mental Health Services Oversight and Accountability Commission. This user manual describes the templates in Microsoft Access 2010.

01/19/2011

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Definitions and Abbreviations

Term	**Meaning**
3M	Quarterly Assessment
ADL	Activities of Daily Living
Adult	Adults of Ages 26 - 59
BPD	Browse Partner Data
CA-RW	County Administrator, Read/Write
Child/Youth	Children of Ages 0 - 15
CSI	Client Services Information
CSV	Comma-Separated Values
DCR	Data Collection and Reporting
DMH	California Department of Mental Health
FSP	Full Service Partnership
FY	Fiscal Year
HIPAA	Health Insurance Portability and Accountability Act
HITECH	Health Information Technology for Economic and Clinical
IADL	Instrumental Activities of Daily Living
KET	Key Event Tracking
MH	Mental Health
MHSA	Mental Health Services Act
MHBG	Mental Health Services Block Grant
MHP	Mental Health Plan
MHSIP	Mental Health Statistics Improvement Program
Older Adult	Older Adults of Ages 60+
PAF	Partnership Assessment Form
PHI	Protected Health Information
PLD	Partner-Level Data
Partner	A Client of the Full Service Partnership
RO	Read Only
RPR	Run Partner Report
RW	Read/Write
SB	Security Breach
SED	Seriously Emotionally Disturbed
SSA	State System Administrator
TAY	Transitional Age Youth (Ages 16 – 25)
TOC	Table of Contents
WIC	California Welfare and Institution Code
XML	Extensible Markup Language
XSD	XML Schema Definition

Chapter 1: Introduction

The Partner-Level Data (PLD) Templates are designed to provide a comprehensive summary of a partner's Full Service Partnership (FSP) Data Collection and Reporting System (DCR) partnership data for the purposes of data quality. The PLD 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 PLD Templates.

Scope

PLD Templates are provided empty of data and are designed to work with the FSP DCR comma-separated values (CSV) files which can be downloaded from the online FSP DCR application.

Note: The FSP DCR currently only allows users with a role of County Administrator, Read/Write (CA-RW) or State System Administrator (SSA) to download CSV files from the FSP DCR.

- ❖ Refer to the FSP DCR User Manual at Chapter 12 "Data Extraction" for further instructions on downloading CSV files from the FSP DCR.

The purpose of the PLD Templates is to organize a summary of a partnership's information such that FSP DCR users can quickly identify missing or aberrant data values, which can then be corrected using the FSP DCR application. Data cannot be changed through the PLD Templates.

- ❖ Refer to the FSP DCR User Manual at Chapter 11 "Data Correction" for further instructions on correcting data in the FSP DCR.

Through PLD Templates, users upload the FSP DCR downloaded CSV data files, and the PLD Templates then provide a snapshot of each partnership up to the point in time when the CSV data files were last downloaded from the FSP DCR**. No changes to data can be made directly through the PLD Templates.** Any data added or corrected in the FSP DCR after the point of the CSV data download will not be displayed in the PLD Templates until a new CSV data file download is uploaded into PLD Templates.

The Partner-Level Data Templates may be useful for the following activities.

- **PLD Template Uses:**
  1. Reviewing individual partner history in the FSP program

2. Reviewing aberrant or questionable data for a partner as identified by data quality reports
3. Identifying the assessment dates for data requiring correction for a partner
4. Investigating and troubleshooting XML data submission errors for a partner's data
5. Cross-checking and spot-checking a county's 3rd party application data compared to the FSP DCR data after XML uploads
6. Creating additional queries and reports based on FSP DCR CSV data downloads utilizing the framework and data codes provided within the Partner-Level Data Templates tool

System Requirements

The FSP DCR reports require Microsoft Access 2010. However, a Microsoft Access 2007 version of the PLD Templates is available. (Microsoft Access 2003 and earlier does not support the required functionality for properly importing the DCR CSV files.)

- ❖ Refer to the System Requirements for Microsoft Office 2010 for information about workstation requirements.

Additionally, a workstation will require internet access in order to download data from the FSP DCR system and sufficient space to store and process these files (recommended 1 Gigabyte free). The workstation will also require a PDF viewing application such as the free Adobe® Reader software.

Data Security

The PLD Templates are empty (without data) when initially provided to Mental Health Directors, and authorized data download files from the FSP DCR must be used to populate the PLD templates. The FSP DCR is equipped with data security such that only authorized users can view or download CSV files of information for a partnership. PLD Templates are intended to be used with the data downloads for authorized FSP DCR users only. PLD Templates are encrypted with a default password. However, to secure information, it is recommended that users change the password for their personal use.

- ❖ Refer to "Changing the Encrypted Password" later in this chapter for further information regarding resetting the PLD Templates password.

Data reports exported or printed from the PLD Templates will contain personal identifying information and protected confidential health information and should be handled accordingly.

Note: Data downloaded from the FSP DCR application as well as any reports generated from this data contain Protected Health Information (PHI), which must be protected with administrative, technical and physical safeguards as required by law pursuant to the Health Insurance Portability and Accountability Act of 1996 (HIPAA) Security Rule (45 CFR Part 160 and Part 164, Subparts A and E), the Health Information Technology for Economic and Clinical Health Act (HITECH Act), the California Security Breach Information Act (SB-1386,) and other state and federal law. Unauthorized use or disclosure is prohibited. It is the responsibility of the user of the PLD Templates to ensure the confidentiality of the PHI of partners in accordance with the aforementioned laws and the user's organization's information security policies and procedures.

Note Regarding Support

The PLD Templates are offered as an unsupported tool to assist users to manage the FSP DCR data. The PLD Templates were constructed using standard Microsoft Access. Users do not need to be familiar with Microsoft Access in order to utilize the PLD Templates.

Further, the PLD templates were built without the use of any peripheral procedures developed in Visual Basic. Therefore, users familiar with Microsoft Access alone should be able to support, augment or adjust the PLD Templates if desired.

Note: Always make a copy of the empty PLD Templates as a backup before adding data or making any changes to the templates.

The Front Page

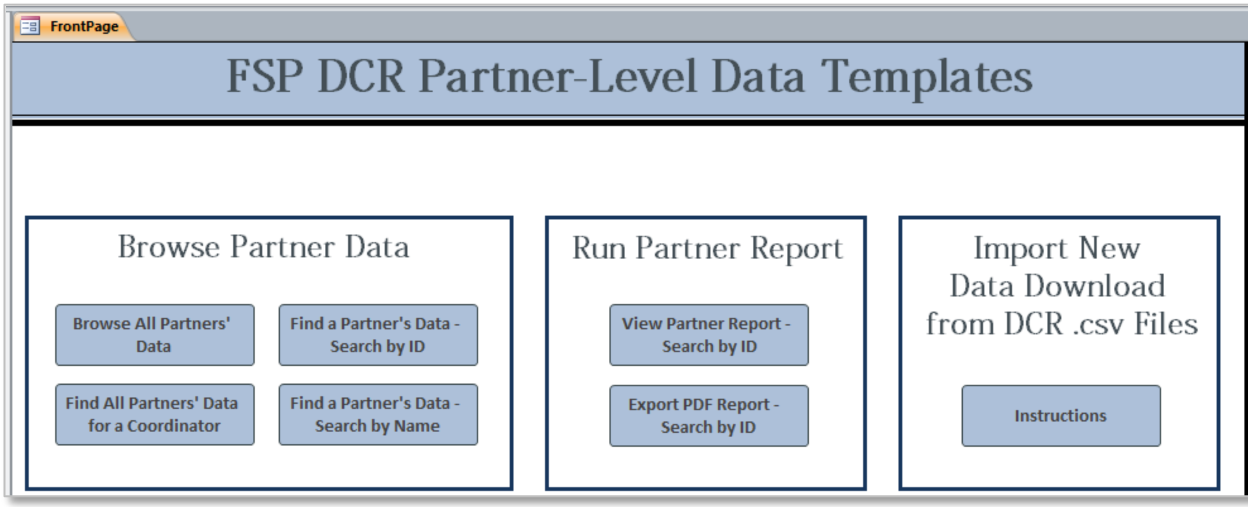
When the PLD Templates file is first opened, a front page is displayed. From the front page, there are two main templates which can be accessed through the PLD Templates.

- **The Two PLD Templates:**
  1. Browse Partner Data (BPD) Template
  2. Run Partner Report (RPR) Template

As seen in Figure 1.1, the BPD template can be accessed by selecting one of the four buttons in the far left-hand box, and the RPR template can be accessed by selecting one of the two buttons in the center box of the front page. Instructions for importing new data downloads from DCR CSV files are available in the far right-hand box of the front page.

- Refer to Chapter 2 "Importing New Data" for further information regarding the importing new data instructions.

Figure 1.1: The Front Page



Overview of PLD Templates

The PLD Templates display partnership data as reported to the FSP DCR organized into 12 sections. The main section of "Partner Information" contains the current or final status of the partnership, and the other 11 sections contain the history of changes reported throughout the partnership. The section organization is listed below.

- **PLD Template Sections:**
  1. **Partnership Information** – The current status of partnership and administrative information for the partnership
  2. **3Ms** – A history of the number of 3Ms completed, the count of days in the partnership when the assessment was performed and the quarter to which it applies
  3. **Administrative Changes** – A list of administrative changes reported for the partnership, including assessment date and dates of change
  4. **D1: Residential** – Days at each residential setting as report with two sub-sections:
     - 12 Months Before FSP
     - During FSP
  5. **D2: Education** – Education history, 3M assessments and key events:
     - 12 Months Before FSP
     - During FSP
  6. **D3: Employment** – Employment history and key events:
     - 12 Months Before FSP
     - During FSP
  7. **D4: Financial** – Financial support history and 3M assessments:
     - 12 Months Before FSP

- o During FSP

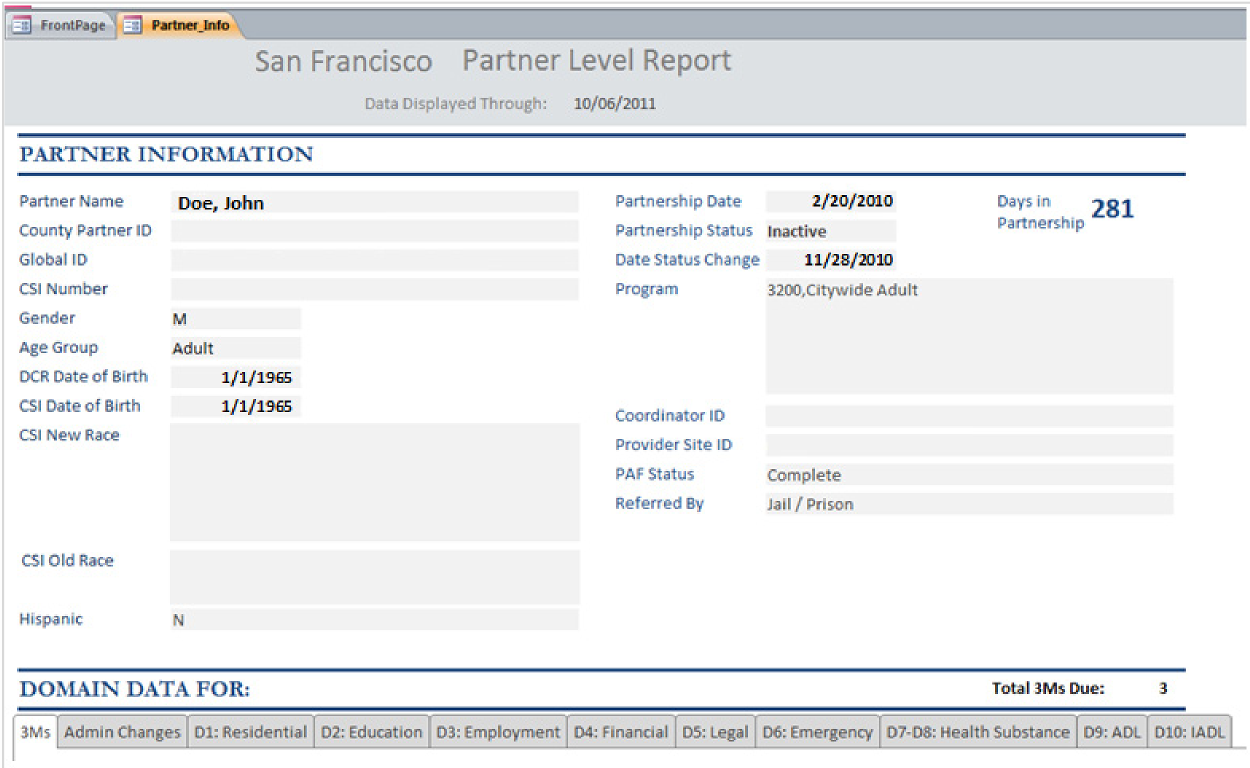
8. **D5: Legal** – Legal issues history, 3M assessments and key events:
    - 12 Months Before FSP
    - During FSP
9. **D6: Emergency** – Emergency interventions history and key events:
    - 12 Months Before FSP
    - During FSP
10. **D7-D8: Health & Substance Abuse** – Health and substance abuse history and 3M assessments:
    - 12 Months Before FSP
    - During FSP
11. **D9: Activities of Daily Living (ADL)** – ADL 3M assessments:
    - During FSP
12. **D10: Instrumental Activities of Daily Living (IADL)** – IADL 3M assessments:
    - During FSP

❖ Refer to the Full Service Partnership (FSP) Data Collection and Reporting (DCR) Data Dictionary document to review the Complete Variable Index (CVI) for each domain.

Overview of the Browse Partner Data (BPD) Template

The BPD template allows users to browse through the data of all of the partnerships. As seen in Figure 1.2, the BPD template displays an overview of the partnership information and a tab for each domain.

Figure 1.2: The Browse Partner Data (BPD) Template



By selecting each tab, users can review all of the FSP data reported for a partnership. Alternatively, users can select one tab of domain information, such as the **D5: Legal** domain for example, and then scroll through each partnership to browse just the data reported for that domain (e.g., legal) for each partnership.

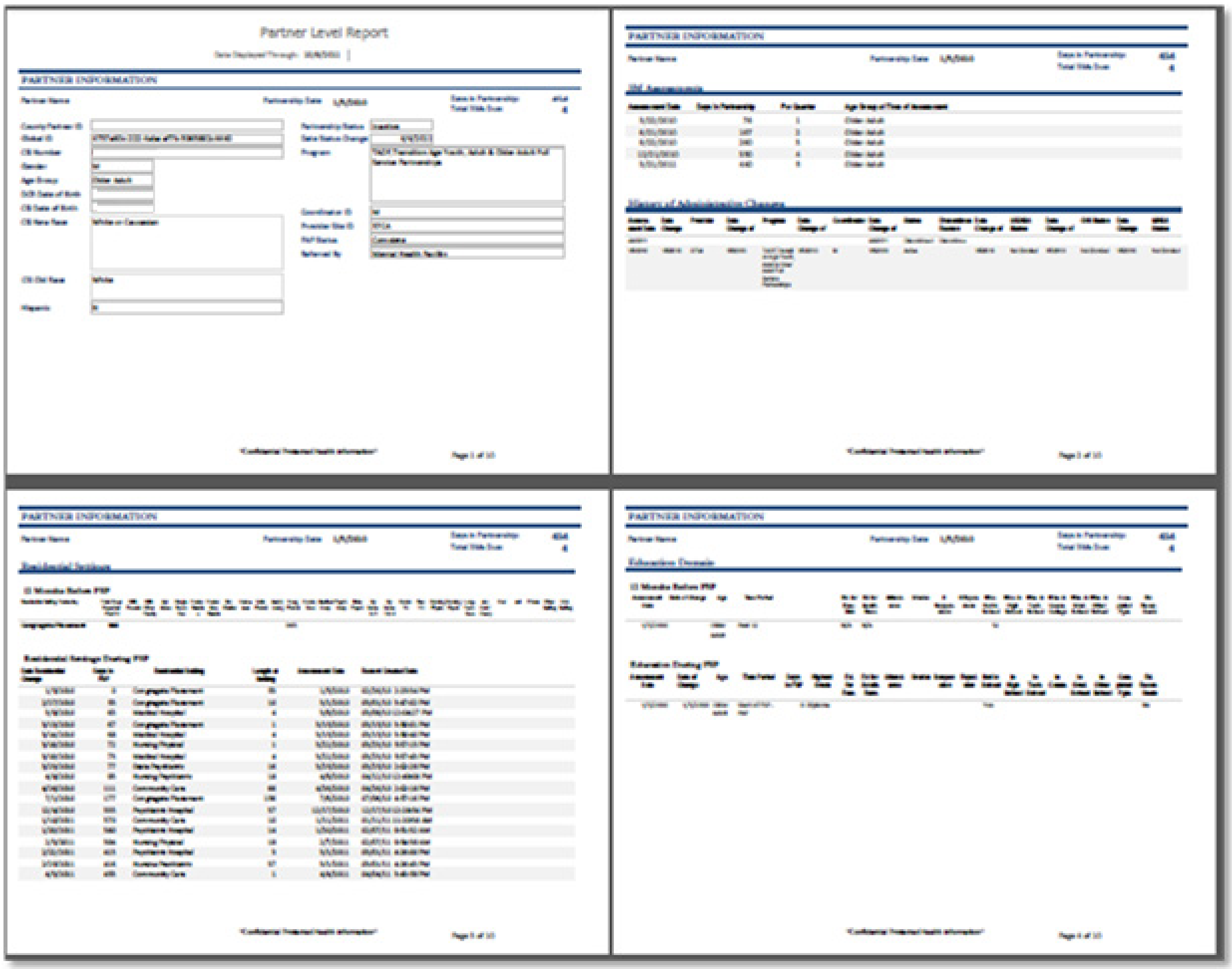
There are four buttons on the front page to access the BPD Template, which will help filter the number of partnerships displayed in the template.

- **The Four Ways to Access the BPD Template:**
  1. **Browse All Partners** displays all partnerships downloaded from the FSP DCR.
  2. **Find All Partners' Data for a Coordinator** displays all partnerships for a coordinator based on entering any part of the coordinator ID.
  3. **Find a Partner's Data – Search by ID** displays the partnership data for a partner by CSI number or by FSP DCR Global ID.
  4. **Find a Partner's Data – Search by Name** displays the partnership data for a partner based on entering any part of a partner's name.

Overview of the Run Partner Report (RPR) Template

The RPR template produces a printable report of one partnership's data. As seen in Figure 1.3, the RPR template displays an overview of the partnership information in a multi-page report which is separated into sections by domain.

Figure 1.3: The Run Partner Report (RPR) Template



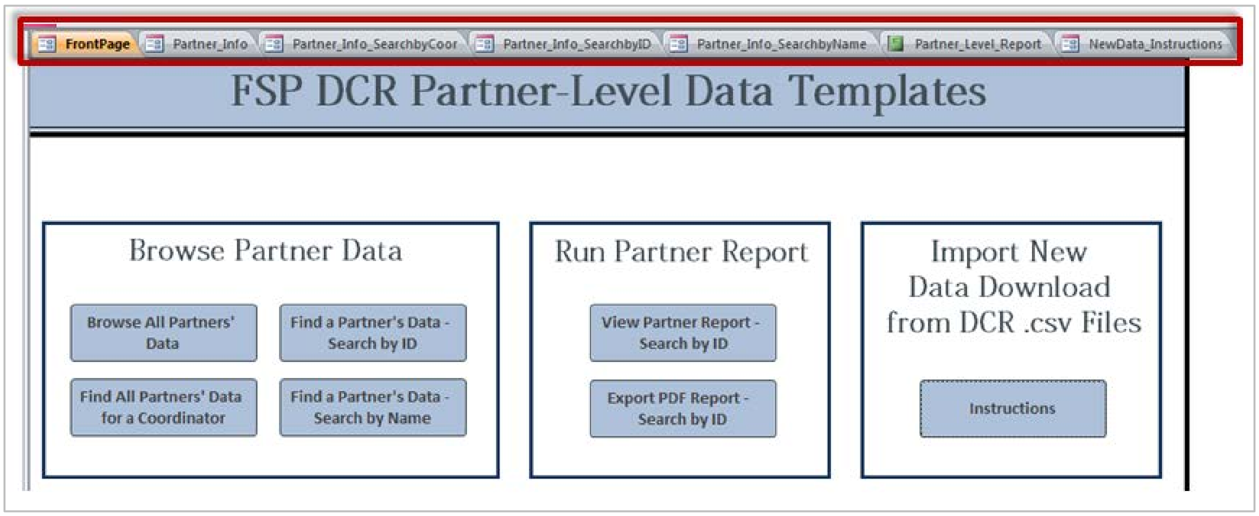
Users can choose to view the partnership report online, print the report or save a PDF of the report on their secure drive/network. A user must have available either the CSI number or the Global ID of a partnership in order to access this template. There are two buttons to launch the RPR template.

- **The Two Ways to Access the RPR Template:**
  1. **View Partner Report – Search by ID**: Displays a printable partnership data report for a partnership by CSI number or by FSP DCR Global ID.
  2. **Export PDF Report – Search by ID**: Saves a partnership data report as a PDF at a chosen location on the user's drive/network.

Managing Open Templates in Microsoft Access

The PLD Templates application will organize all of your open templates into tabs across the top of the page. As seen in Figure 1.4, a tab will be generated each time a user selects a button from the front page (except for the Export PDF Report, which saves a file). In Figure 1.4, a tab is open for the front page and each of the buttons on the page (except for the Export PDF Report button). Re-selecting the button on the front page while the corresponding tab is still open will relocate the user to that tab. To run the template again to select a different set of partnerships, first close the open template and then select the appropriate button to rerun the template with new search criteria.

Figure 1.4: Managing Open Templates



Any open template can be closed using the **X** in the upper right-hand corner of the open template. No information will be lost from the PLD Templates by closing and opening the BPD or RPR templates. If the FrontPage is accidentally closed, then close and re-open the application to access the front page once again.

Changing the Encrypted Password

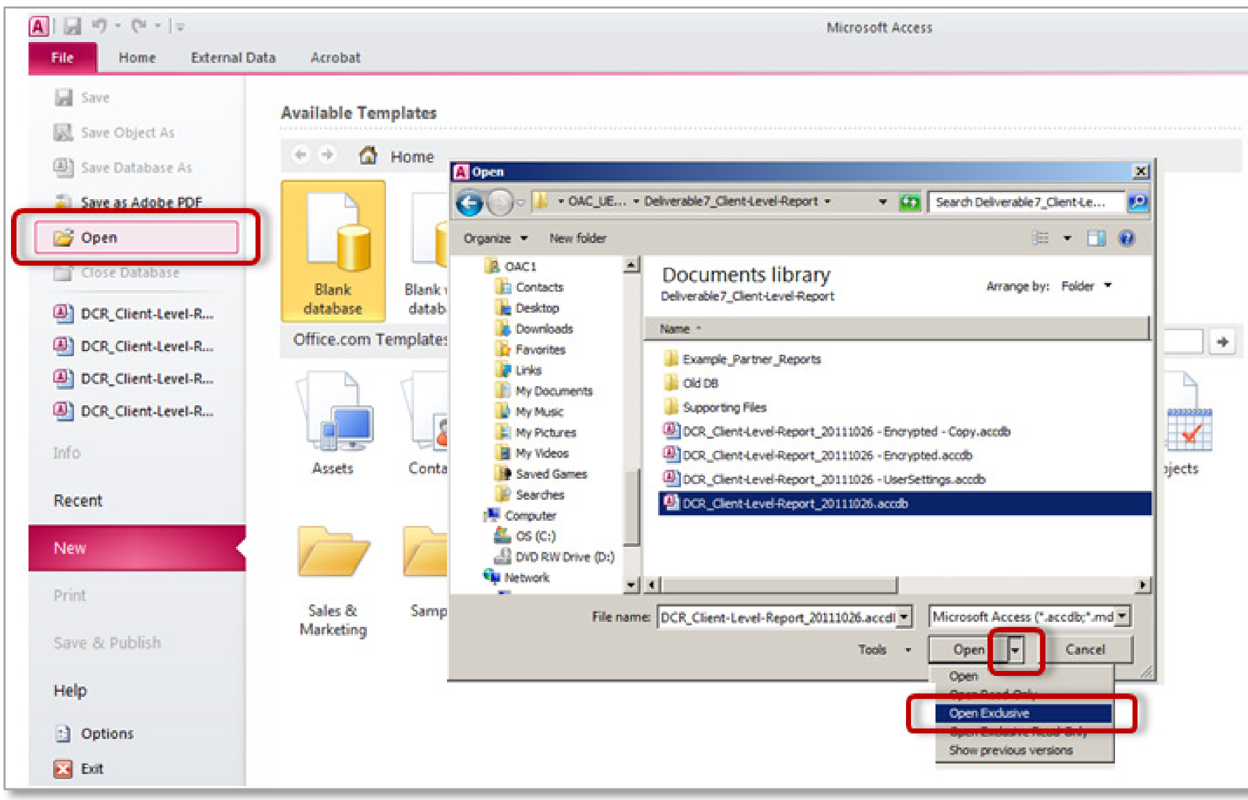
The PLD templates come empty of data and equipped with an encrypted password, which will be provided to each Mental Health Director. The encrypted password can be changed with the following instructions. It is most efficient to decrypt and re-encrypt the PLD templates when they are clear of data.

To Change the Encrypted Password

1. The PLD templates must first be opened in "Exclusive" mode for the encryption and decryption. Launch Microsoft Office from your computer's program Menus. Then, as seen in Figure 1.5, select **File > Open** to launch a file browser screen.

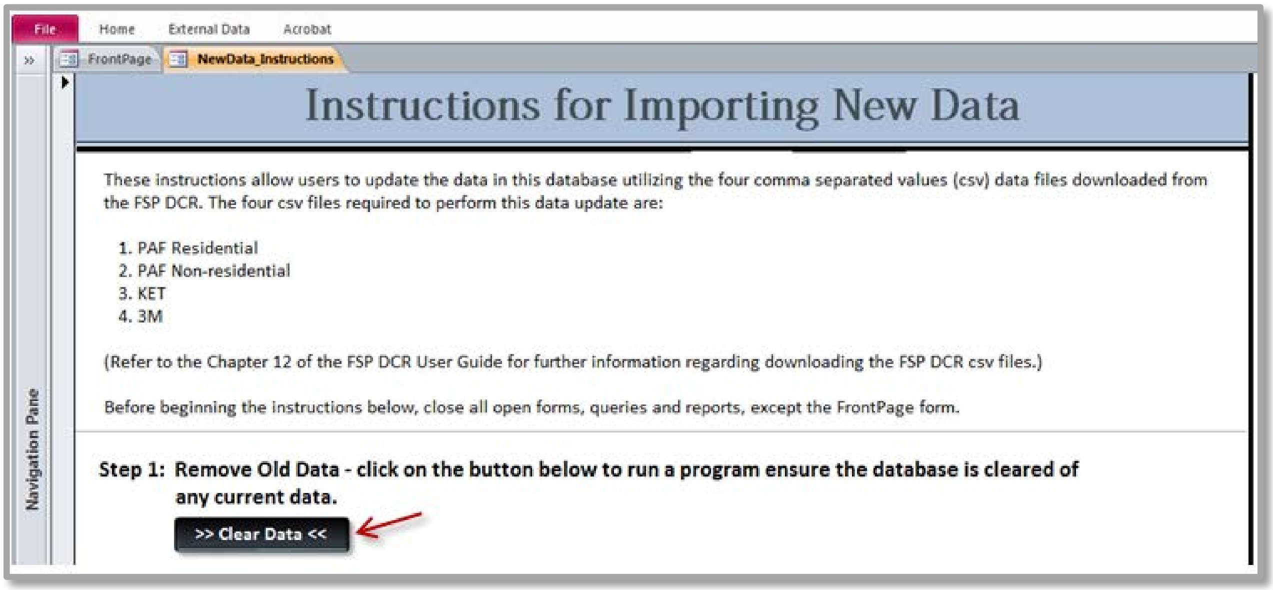
2. As seen in Figure 1.5, browse to the PLD Templates file and click once to highlight the file. Select the down arrow ▼ to the right of the open button and choose **Open Exclusive**.

Figure 1.5: Opening the PLD templates in "Exclusive" Mode



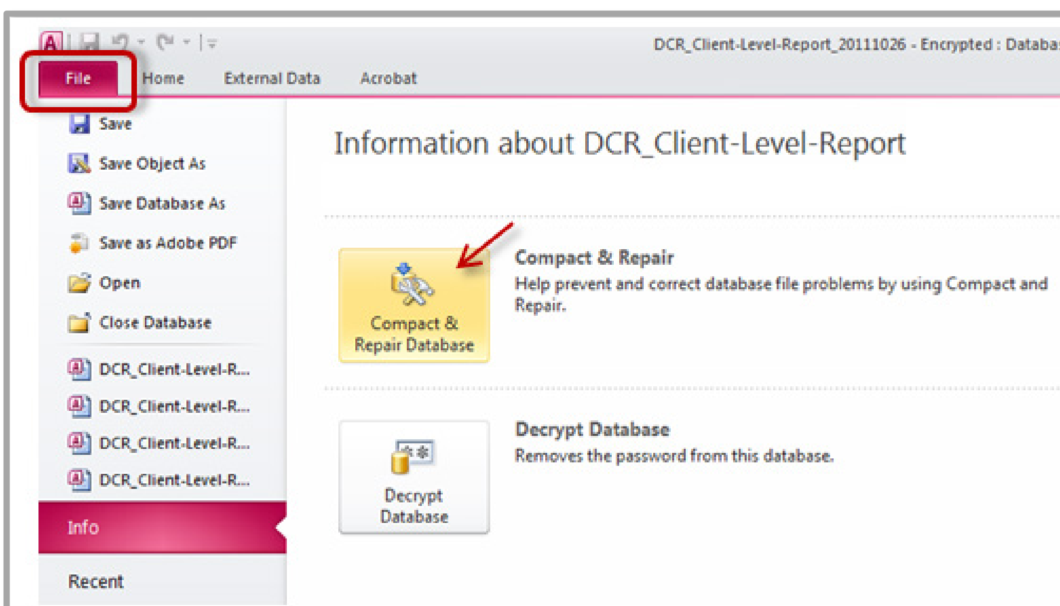
3. If the PLD templates have been populated with data, then first clear the data. (This will expedite the decryption and encryption process.) Otherwise, skip to step 5. From the front page of the PLD Templates, click on the **Instructions** button in the "Import New Data Download from DCR CSV Files" box. As seen in Figure 1.6, click the **[>> Clear Data <<]** button to clear all data from the PLD templates.

Figure 1.6: Clearing the Data from the PLD Templates



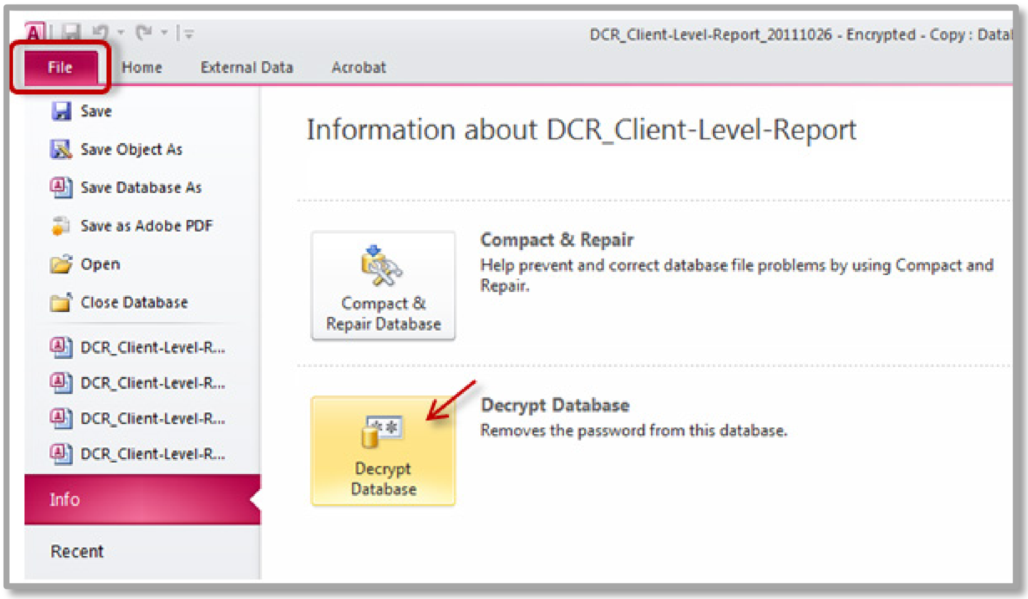
4. After clearing the data, compact and repair the PLD templates to expedite the encryption process. As seen in Figure 1.7, select the **File** menu and select the **Compact and Repair Database** button.

Figure 1.7: Compact and Repair PLD templates



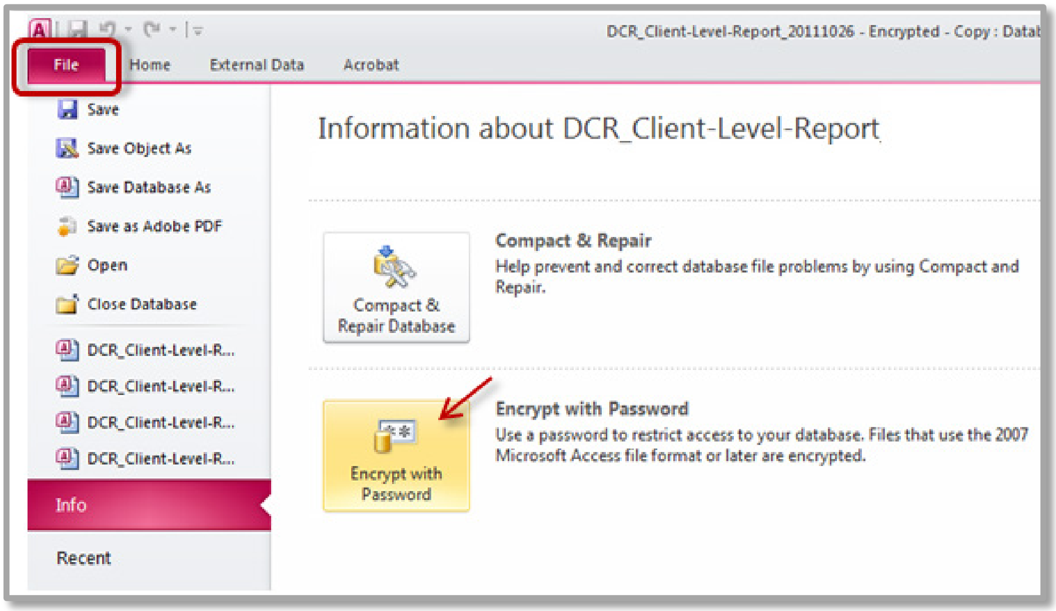
5. Decrypt the PLD templates to remove the current encryption password. As seen in Figure 1.8, select the **File** menu and select the **Decrypt Database** button. Enter the current password when prompted.

Figure 1.8: Decrypt PLD templates



6. Re-encrypt the PLD templates with the new encryption password. As seen in Figure 1.9, select the **File** menu and select the **Encrypt Database** button. Enter and verify the new password when prompted.

Figure 1.9: Encrypt the PLD templates



7. The PLD templates are now encrypted with the new password. Close the PLD templates from "Exclusive" mode and open the PLD templates normally by double clicking on the file. Enter the new password to access the PLD templates.

Compacting and Repairing the PLD Templates

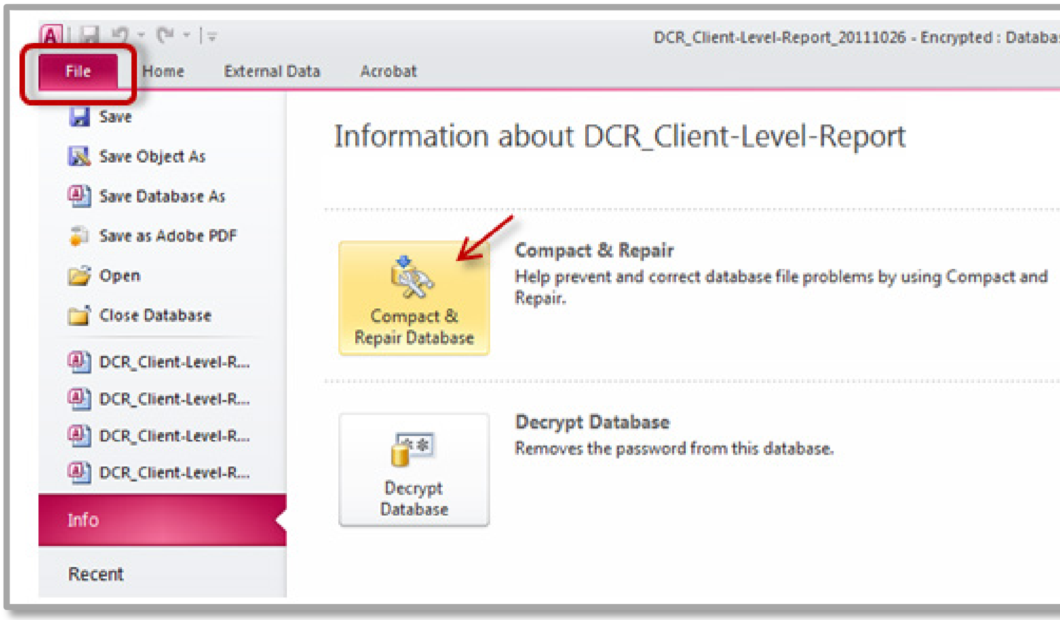
To maintain optimal performance of your PLD Templates, the file must be compacted and repaired on occasion. We recommend that the PLD Templates be compacted and repaired each time before an updated set of data is imported into the PLD Templates, and the step to compact and repair exists in the appropriate location in the instructions for importing data. In addition, however, the PLD Templates may need to be compacted and repaired after some use to view the imported data. Compacting and repairing the PLD Templates while they contain data will be slower than compacting and repairing the empty database during the data import procedure. Depending on the level of use of the PLD Templates, we recommend that the PLD Templates are compacted and repaired on a regular schedule (e.g., once a week).

To Compact and Repair the PLD Templates

1. As seen in Figure 1.10, with the PLD Templates open in Microsoft Access, select the **File** menu.
2. As seen in Figure 1.10, select the **Compact and Repair Database** button.

Note: The compact and repair database procedure can be stopped by pressing CTRL + BREAK or ESC on your keyboard.

Figure 1.10: Compacting and Repairing the PLD Templates



Chapter 2: Importing New Data

The PLD Templates come empty of data. It is recommended that users store an empty copy of the PLD Templates as a backup in the event that Microsoft Access file corruption issues arise while utilizing the PLD Templates. The PLD Templates are designed for use with the DCR CSV files, which can be downloaded from the online FSP DCR. Users must use the downloaded data files from the online FSP DCR application.

- ❖ Refer to the FSP DCR User Manual at Chapter 12 “Data Extraction” for further instructions on downloading CSV files from the FSP DCR.

The PLD Templates are designed to work with one entire set of the four downloaded FSP DCR CSV files (PAF Residence, PAF Non-Residence, KET and 3M) at a time. Therefore, when a new updated set of files is downloaded for use with the templates, the old data must be cleared from the database.

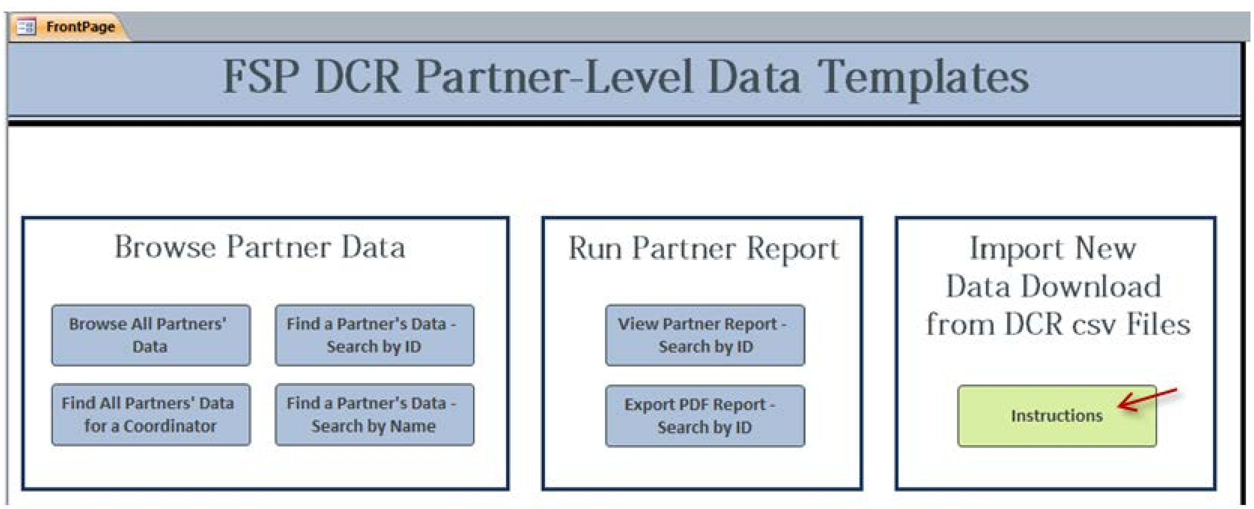
Importing Data Files

Before importing new data for the first time, make a copy of the empty PLD Templates to store as a backup.

To Import Data to the PLD Templates

1. With the PLD Template open in Microsoft Access, as seen in Figure 2.1, select the **Instructions** button from the front page.

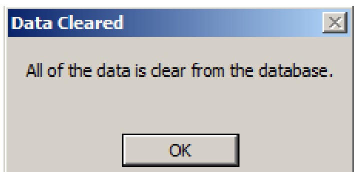
Figure 2.1: Accessing the Instructions for Importing New Data



2. Perform Step 1 from the instructions to clear the data from the database. By selecting the **[>> Clear Data <<]** button, a macro will run to clear all of the existing data in the database. If no data exists in the database, performing this step will not harm the PLD Templates. As seen in Figure 2.2, a pop-up message will alert you when the process is complete.

Note: Existing data must be cleared before using the PLD Templates with new data downloads. If it is desired to use the PLD Templates with both the historic and current sets of downloaded DCR CSV files, then a copy of the PLD Templates file can be made before clearing the historic data such that one file will contain the historic data and the other will be cleared and used to import the current data.

Figure 2.2: Data Cleared Alert Message



3. Perform Step 2 to compact and repair the empty PLD Templates. Microsoft Access may close the **Instructions** tab during the compact and repair process. Simply re-open the tab by selecting the **Instructions** button on the front page and continue the data import process.

4. Perform Step 3 to import the current data files of FSP DCR data. This step will be repeated until all four CSV files have been uploaded into the appropriate tables in the PLD Templates:

    - Import the PAF Residential File into the [DCR_PAFRes] table
    - Import the PAF Non-residential file into the [DCR_PAFnonRes] table
    - Import the KET file into the [DCR_KETs] table
    - Import the 3M file into the [DCR_3M] table

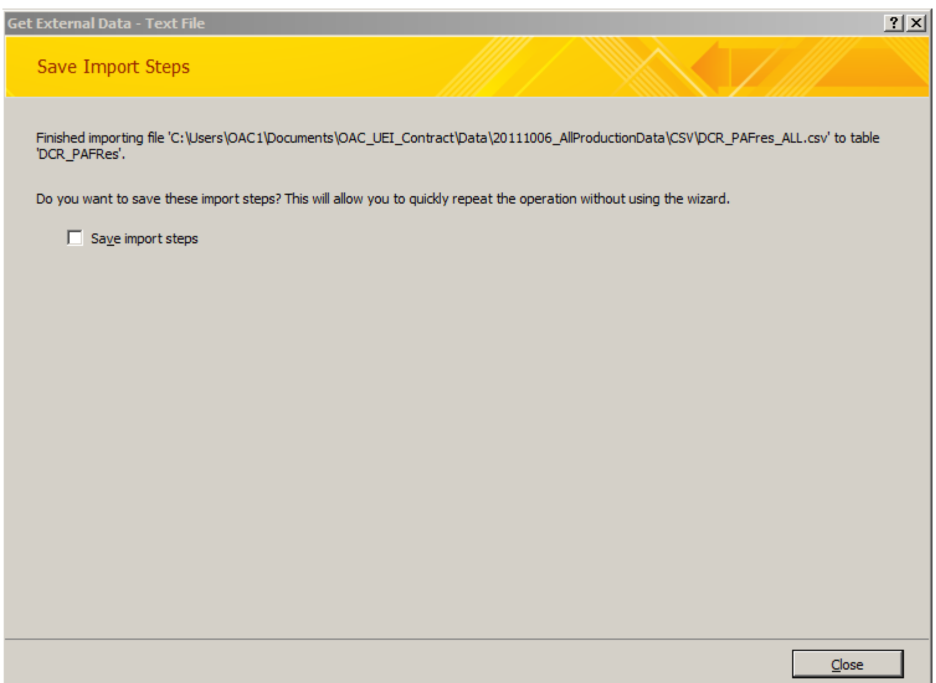
Note: The tables listed above will appear at the bottom of the drop-down list. Be sure to carefully read the table names in the drop-down list to ensure the correct table is selected for the import file. An error message will prevent you from importing the data into the wrong table.

As seen in Figure 2.3, after each file is imported, a pop-up screen will alert you that the process is complete. The pop-up screen will also alert you if any errors were present in the import. Any errors from the data import will be saved in a table noted on the pop-up screen.

Note: The “CreatedDate” from the 3M CSV file may be corrupt in the FSP DCR data downloaded file. Although all of the other fields will import correctly, the “CreatedDate” field may not import with each 3M record. **This is okay and it will not affect the use of the PLD Templates.** If this occurs, the pop-up screen will alert you that there were errors on import, and the table of errors can be reviewed. A review of the table of errors will show that the only field with error was the “CreatedDate” field because of a “Type Conversion Failure”.

- ❖ Refer to the “Reviewing Data Import Errors” section later in this chapter for further instructions on reviewing data import errors.

Figure 2.3: All Data Imported without Errors Message



5. Perform Step 4 by selecting the **[>> Run Update <<]** button. This will run a macro which will make the data available to the templates.

Note: The new data will not be available for viewing through the PLD Templates until the **[>> Run Update <<]** macro is run. The macro generates the necessary temporary tables based on a series of Microsoft Access queries.

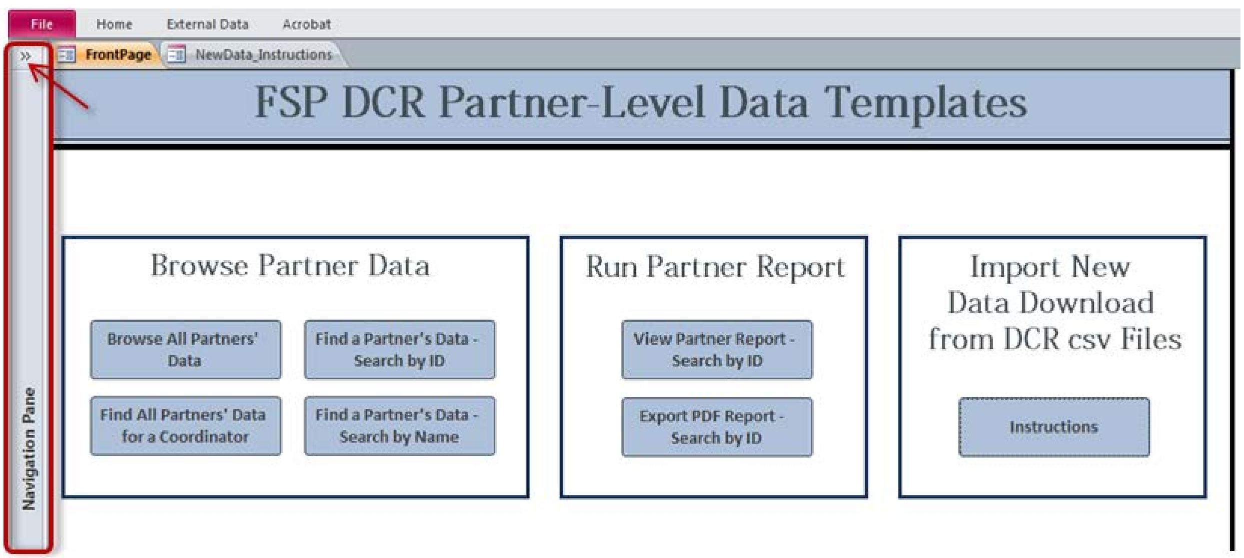
Reviewing Data Import Errors

Errors that occur during data import can be reviewed in the Microsoft Access table generated from the import process.

To Review Data Import Errors

1. As seen in Figure 2.4, with the PLD Template open in Microsoft Access, select the **[>>]** button on the top of the bar labeled **Navigation Pane**.

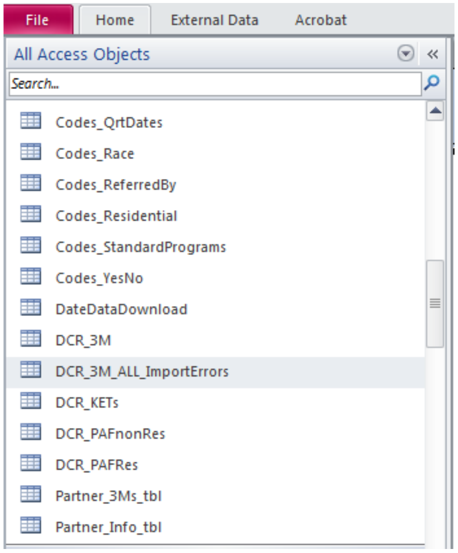
Figure 2.4: Expanding the Navigation Pane



2. As seen in Figure 2.5, the Navigation Pane will expand to show the tables, queries, forms, reports and macros which support the PLD Templates. Scroll to the top of the **Tables** section and review the table names until you reach the table containing the import errors as noted by the complete file import pop-up screen at the end of the file import process.

Note: A table with import errors will only be present if one was created during the import text file process.

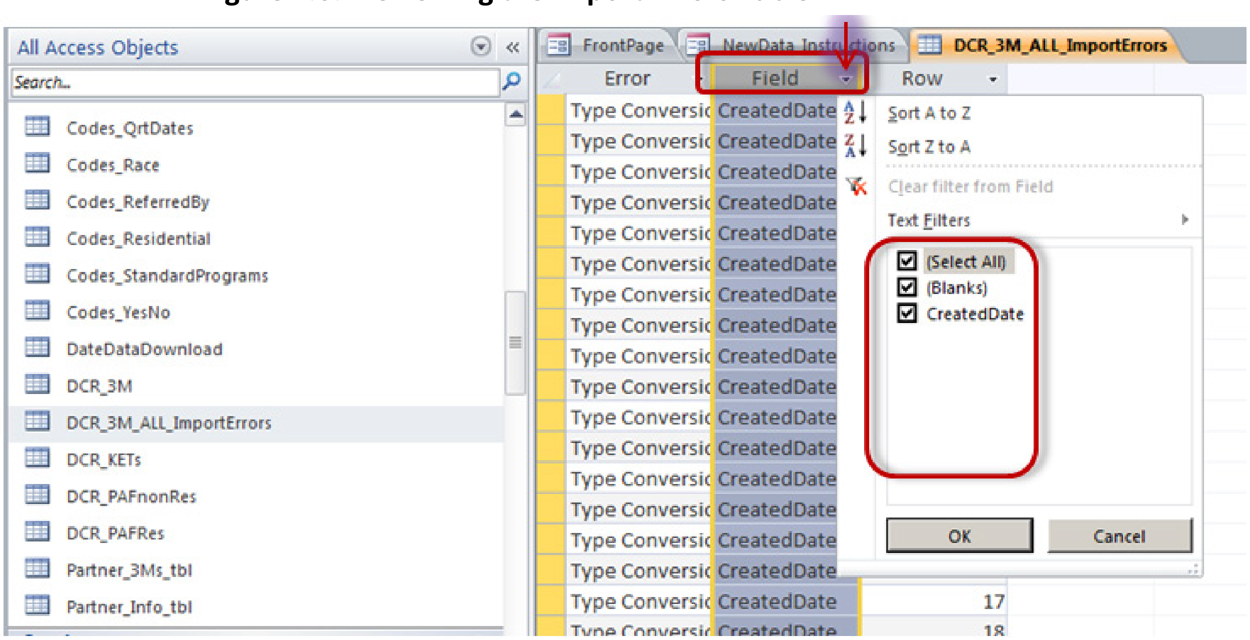
Figure 2.5: Locating the Import Errors Table



3. Double click on the table with errors to open a view of the table.

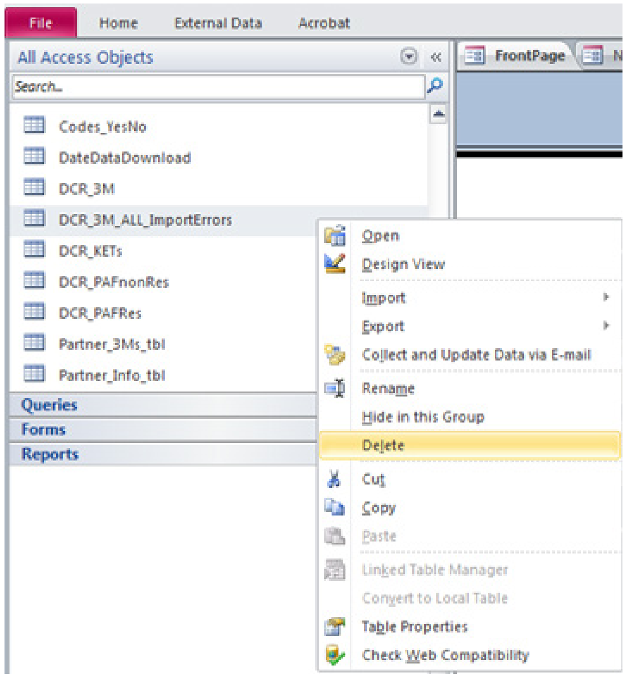
4. As seen in Figure 2.6, the table will display the errors from the import. To quickly view all of the fields with error, select the down arrow ▼ in the Field column. This will bring a pop-up window allowing you to filter the table based on all of the fields which had errors. In this example, the only field with import errors was the "CreatedDate" field.

Figure 2.6: Reviewing the Import Errors Table



5. After reviewing the errors, close and delete the error table to keep the database clear of extraneous data. As seen in Figure 2.7, right click on the table with import errors and select the **Delete** option. Click okay to confirm the deletion.

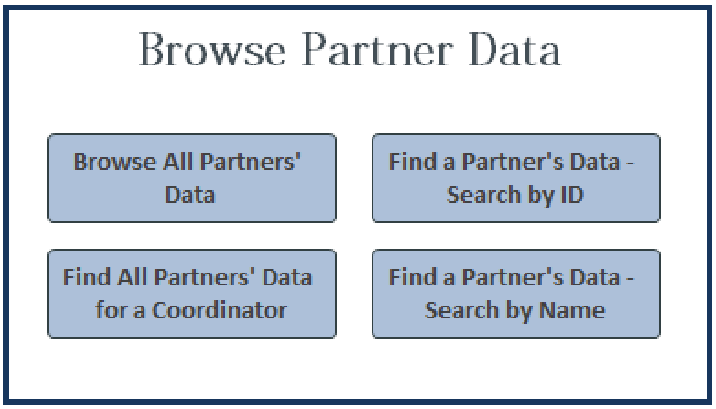
Figure 2.7: Deleting the Import Errors Table



Chapter 3: The Browse Partner Data (BPD) Template

The BPD template includes several options to browse partners' data, which can be accessed through the four buttons in the "Browse Partner Data" section of the front page as seen in Figure 3.1. You can browse through all partners' partnership data or search by partner ID, partner name or coordinator ID.

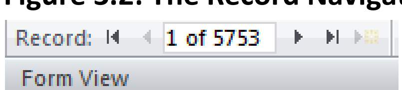
Figure 3.1: The Buttons to Access the BPD Template



Selecting any of the four buttons and entering appropriate criteria when required will display the BPD template. At the top of the BPD template, the "Data Displayed Through:" date signifies the last time the data in the PLD templates was updated from FSP DCR data file downloads. Under the subheading of "Partner Information", the first partnership's partner information will be displayed.

There may be many partnerships available to browse. The total amount of partnerships and the current order of the partnership being viewed are displayed at the bottom left-hand corner of the report as the **Record** navigation box. As seen below in the example in Figure 3.2, the first of 5,753 total partnerships is displayed in this example.

Figure 3.2: The Record Navigation Box



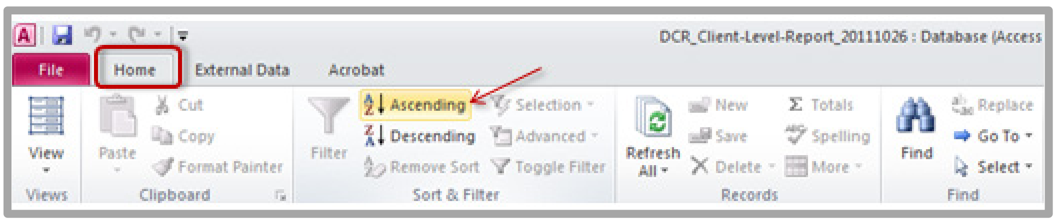
You can navigate to the next or previous partnership by clicking on the arrows to the left and right of the **Record** navigation box. Additionally, you can locate a partnership in a specific order by clicking on the **Record** navigation box and manually typing in a number within the range of the available partnership count and pressing **Enter**. The form will jump to the partnership associated with that order number. This may be useful when the partnerships are sorted in the form by a specific order. By default, the partnerships are sorted by partnership status and partnership date, such that the active partnerships with the most recent partnership dates appear first. However, the partnerships can be sorted by other fields in the template.

To Sort the Partnership Order in the BPD Template

1. Place your cursor in the field in the "Partner Information" section of the BPD template which you would like to use to sort the partnerships (e.g., Age Group).

2. As seen in Figure 3.3, select the **Home** menu and by selecting either the **Ascending** or **Descending** button to sort the partnerships by the previously selected field.

Figure 3.3: The Sorting Buttons



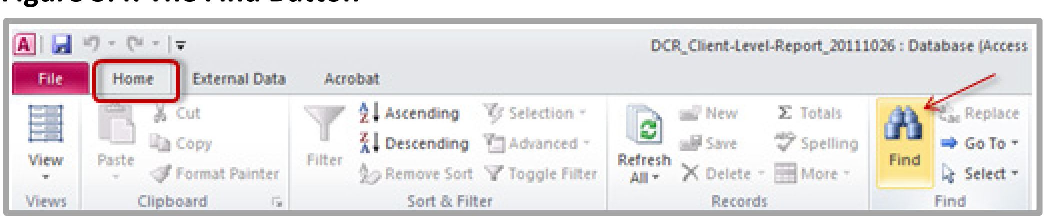
In a similar manner, you can jump to a specific partnership in the BPD Template through the **Find** option.

To Jump to a Partner in the BPD Template

1. Place your cursor in the field in the "Partner Information" section of the BPD template which you would like to use to find a partnership (e.g., Partner Name).

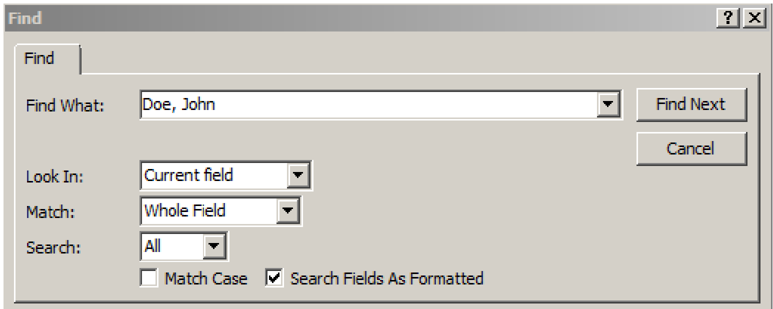
2. As seen in Figure 3.4, select the **Home** menu and then select the **Find** button.

Figure 3.4: The Find Button



3. As seen in Figure 3.5, enter the criteria for the search. In this example, we are searching the partner name field to find a specific partner by name.

Figure 3.5: Entering Search Criteria to Find a Partner

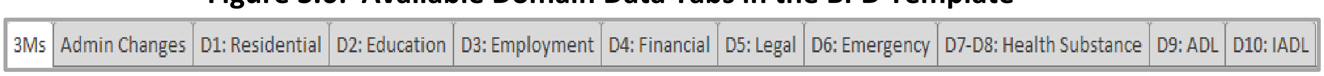


4. As seen in Figure 3.5, the **Find** box will remain open, and you can select the **Find Next** button to jump to the next partnership with matching search criteria.

Note: Selecting to search information under the "Domain Data For" sections in the lower half of the BPD template will only search for data within the partnership which is currently being displayed. The search will not bring up other partnership's matching data.

Under the "Domain Data For" subheading, there are tabs for the partnership's information such as their legal, financial and employment data. All domain options are displayed in Figure 3.6. Data associated with a tab will be displayed by clicking on the tab. If the data for the tab is longer than the remaining vertical space in the application screen, then a vertical scroll bar will appear to allow scrolling within the table embedded in the tab.

Figure 3.6: Available Domain Data Tabs in the BPD Template



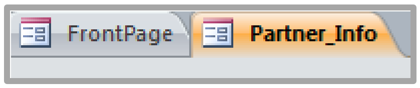
When a tab is selected, you can change records to the next partnership and the same tab of data for the new partnership will be displayed. In this way, you can quickly review and compare data for one domain, for example financial data, as you move through partnership records.

The four buttons on the front page to access the BPD template will apply a different filter on the number of partnerships displayed, and the criteria for the filters are displayed in the remaining sections of this chapter.

Browse All Partner's Data Button

The **Browse All Partner's Data** button applies no filter to the BPD template such that all available partnerships are displayed. To browse data for all partnerships, click on the **Browse All Partners' Data** button from the "Browse Partner Data" box on the front page. As seen in Figure 3.7, the **Browse All Partner's Data** button will display the BPD Template in a tab titled "Partner_Info".

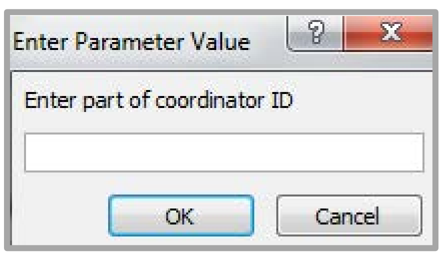
Figure 3.7: The Browse All Partners' Data Tab



Find All Partner's Data for a Coordinator Button

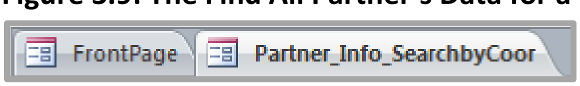
The **Find All Partner's Data for a Coordinator** will apply a filter to the BPD template based on matching the criteria entered with a coordinator ID. As seen in Figure 3.8, selecting this button will bring up the "Enter Parameter Value" pop-up window. Typing in any portion of a coordinator ID in the box will apply the filter to the BPD template. The BPD template will then display only those partnerships with associated coordinator IDs containing the entered text as any consecutive part of the coordinator ID. For example, entering "Smith" in the "Enter Parameter Value" pop-up window will display partnerships for all coordinator IDs with any portion of "Smith" as part of the ID.

Figure 3.8: The Pop-Up Window for Search Criteria of a Coordinator ID



As seen in Figure 3.9, the BPD template will open in a new tab titled "Partner_Info_SearchbyCoor" with partnership records that are exclusive to the coordinator ID search performed. The number of partnerships available can be seen in the **Record** box in the lower left-hand corner of the screen.

Figure 3.9: The Find All Partner's Data for a Coordinator Tab

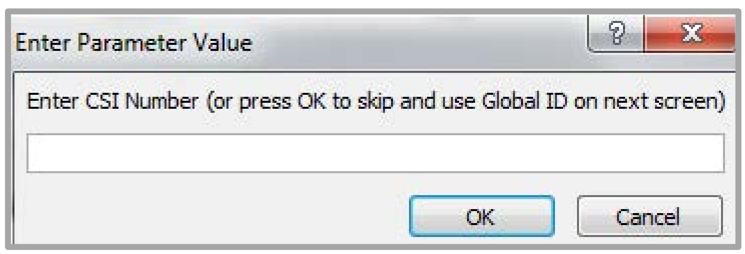


Find a Partner's Data – Search by ID Button

The **Find a Partner's Data – Search by ID** button will apply a filter to the BPD template based on matching the criteria entered with a partner ID. There are two options for entering partner IDs. You can enter a CSI number in the first pop-up window or enter a Global ID in the second window.

To search for a specific partnership by partner ID number, click on the **Find a Partner's Data – Search ID** button under the "Browse Partner Data" heading. As seen in Figure 3.10, the first pop-up window that appears will allow you to enter search criteria of CSI number. If known, enter the CSI number and press **OK**. If you would prefer to search by Global ID, enter nothing in this first window and click **OK** to skip the search by CSI number.

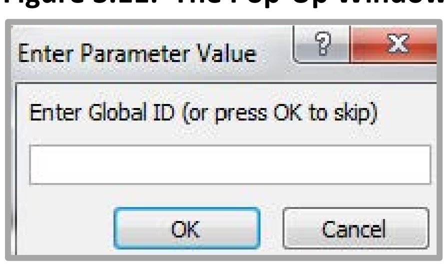
Figure 3.10: The Pop-Up Window for Search Criteria of a CSI Number



Note: You can use CTRL + V to paste search criteria values into the "Enter Parameter Value" pop-up windows.

As seen in Figure 3.11, the second pop-up window that appears will allow you to enter search criteria of Global ID. If a CSI Number was already entered in the previous pop-up window, then click **OK** to skip the search by Global ID. If the CSI Number was not entered, then enter a Global ID for a partnership and press **OK** to continue.

Figure 3.11: The Pop-Up Window for Search Criteria of a Global ID



As seen in Figure 3.12, the BPD template will open in a new tab titled "Partner_Info_SearchbyID" with the partnership information for the partnership matching the partner ID entered into the search box. The number of partnerships for partners with matching IDs is displayed in the **Record** box in the lower left-hand corner of the screen.

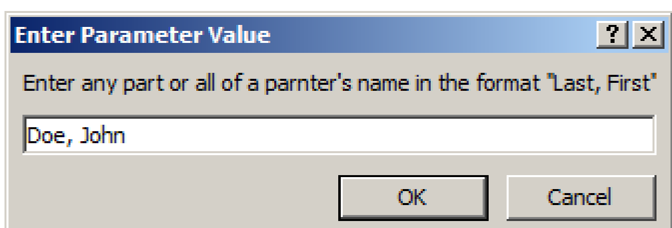
Figure 3.12: The Find a Partner's Data – Search by ID Tab

Find a Partner's Data – Search by Name Button

The **Find a Partner's Data – Search by Name** will apply a filter to the BPD template based on matching the criteria entered with a partner's name.

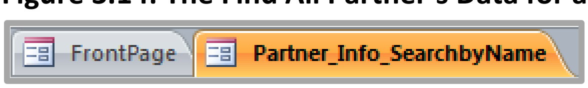
As seen in Figure 3.13, selecting this button will bring up the "Enter Parameter Value" pop-up window. Typing in any portion of a partner's name in the box will apply the filter to the BPD template. The BPD template will then display only those partnerships which contain the entered text as any consecutive part of the partner name. For example, entering "Martin" in the "Enter Parameter Value" pop-up window will display partnership data for all partnerships with any portion of "Martin" as either their first or last name. The standard FSP DCR format for the name field is "Last, First". Therefore, you can conduct a search for a partnership using the full name with that format. As seen in Figure 3.13, for example John Doe would be found using "Doe, John".

Figure 3.13: The Pop-Up Window for Search Criteria of a Partner's Name



As seen in Figure 3.14, the BPD template will open in a new tab titled "Partner_Info_SearchbyName" with partnerships matching the search criteria displayed. The number of partnerships matching the search can be seen in the **Record** box in the lower left-hand corner of the screen.

Figure 3.14: The Find All Partner's Data for a Coordinator Tab



Chapter 4: The Run Partner Report (RPR) Template

The RPR template includes two options to generate a partnership report, which can be accessed through the two buttons in the "Run Partner Report" section of the front page as seen in Figure 4.1. The RPR template can be viewed in Microsoft Access as an Access report or it can be exported as a PDF file.

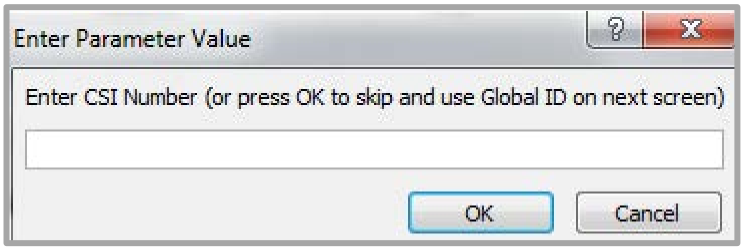
Figure 4.1: The Buttons to Access the RPR Template

The View Partner Report – Search by ID Button

The **View Partner Report – Search by ID** button will display a report within Microsoft Access, which can be viewed electronically or printed from Microsoft Access. A report for a partnership is displayed based on matching the criteria entered for a partner ID. There are two options for entering partner IDs. You can enter a CSI number in the first pop-up window or enter a Global ID in the second pop-up window.

To display a report for a specific partnership, click on the **View Partner Report – Search by ID** button under the "Run Partner Report" heading. As seen in Figure 4.2, the first pop-up window which appears will allow you to enter search criteria of CSI number. If known, enter the CSI number and press **OK**. If you would prefer to search by Global ID, click **OK** to skip the search by CSI number.

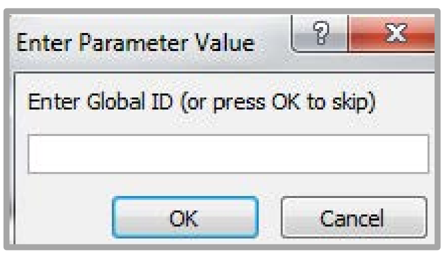
Figure 4.2: The Pop-Up Window for Search Criteria of a CSI Number



Note: You can use CTRL + V to paste search criteria into the "Enter Parameter Value" pop-up windows.

As seen in Figure 4.3, the second pop-up window which appears will allow you to enter search criteria of Global ID. If a CSI Number was already entered in the previous pop-up window, then click **OK** to skip the search by Global ID. If the CSI Number was not entered, then enter a Global ID for a partnership and press **OK** to continue.

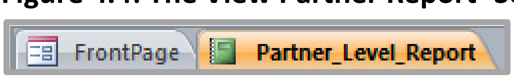
Figure 4.3: The Pop-Up Window for Search Criteria of a Global ID



Note: The RPR template can only be run using a partner ID. If a partner ID is unknown, but a partner name is known, then the CSI number and/or Global ID can be identified by using the BPD template and searching for a partnership using the partner's name. Then the IDs from the BPD template can be copied and pasted as search criteria for the RPR template.

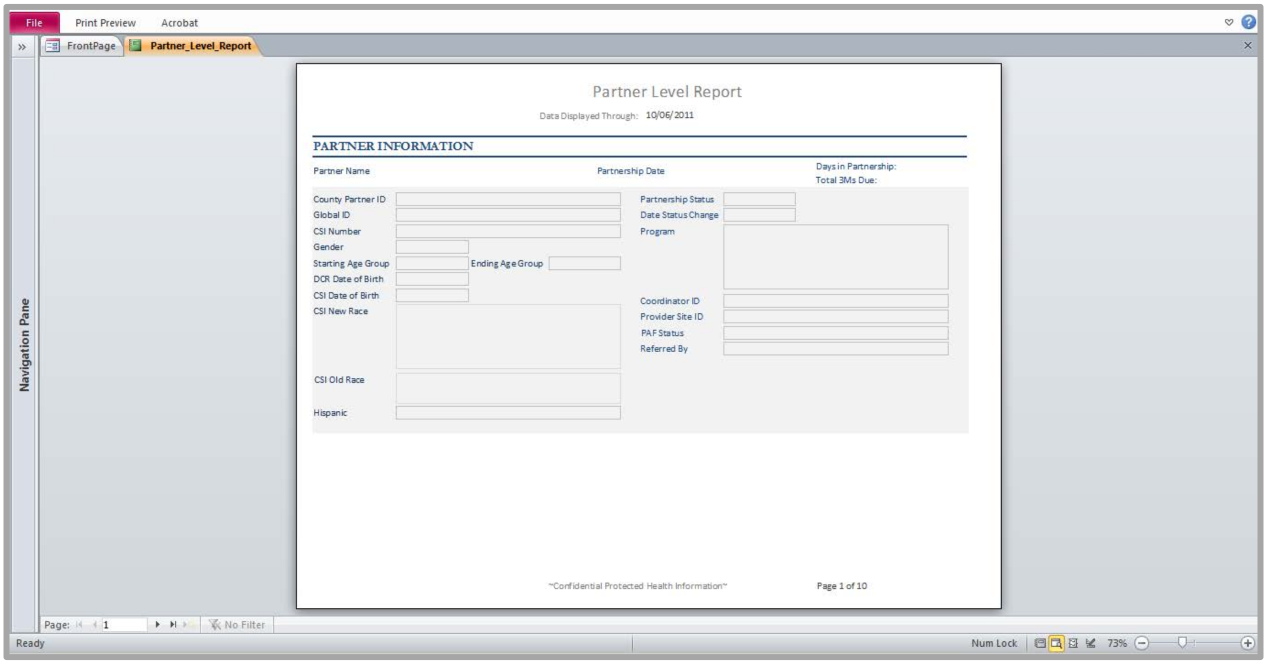
As seen in Figure 4.4, the RPR report will open as a new tab titled "Partner_Level_Report".

Figure 4.4: The View Partner Report- Search by ID Tab



As seen in Figure 4.5, the report will open in print preview mode. At the top of the RPR template, the "Data Displayed Through:" date signifies the last time the data in the PLD templates was updated from FSP DCR data file downloads. The bottom right-hand corner of the report will display the page number.

Figure 4.5: The View Partner Report – Search by ID Report

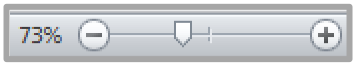


As seen in Figure 4.6, the **Page** selector in the lower left-hand corner will allow you to scroll or jump to any page in the report.

Figure 4.6: The Page Selector

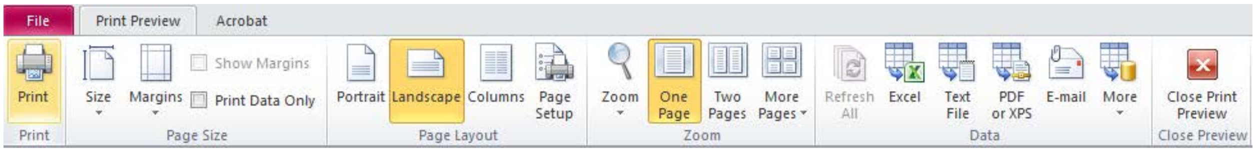
As seen in Figure 4.7, a zoom slide-bar in the lower right-hand corner allows you to quickly enlarge or shrink the view of the report on the screen.

Figure 4.7: Zoom Slide-bar



As seen in Figure 4.8, The **Print Preview** ribbon heading has print options. Clicking **Print** will print the partnership report. You can also zoom in or out and view the report by more than one page in the “Zoom” section of the ribbon. The **Close Print Preview** option will exit the partner level report and return you to the front page.

Figure 4.8: The Print Preview Ribbon



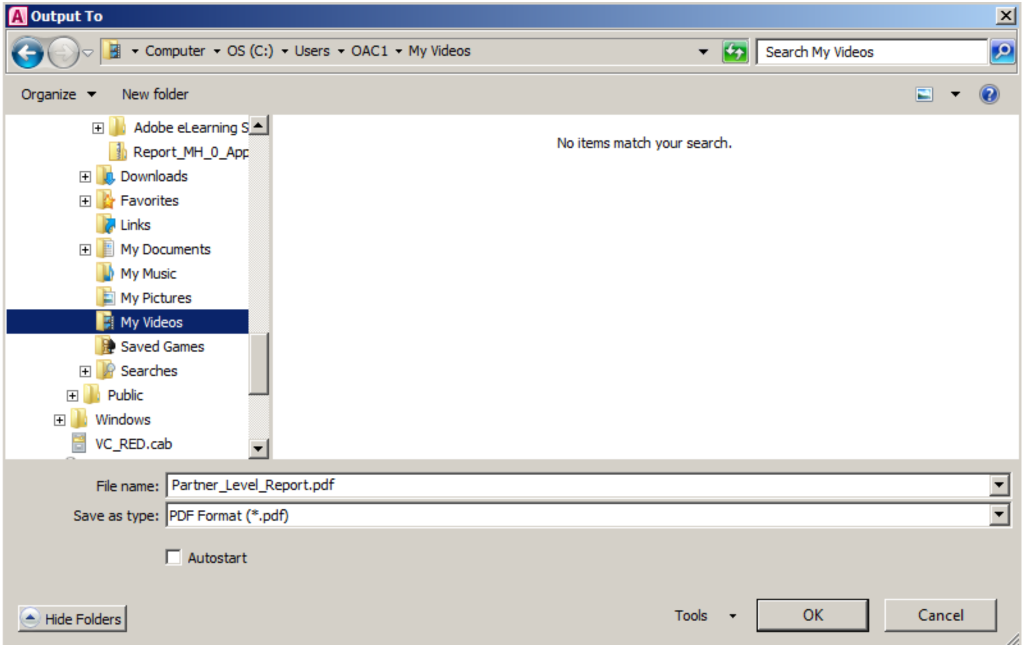
Note: The margins of the partner report are set for printing on standard printers. Adjusting the margins may affect the quality of the report. However, if the report prints extra blank pages on your printer, then slightly widening the margins may solve the issue.

The Export PDF Report – Search by ID Button

The **Export PDF Report – Search by ID** button will export a PDF file of a partnership report to a desired location on your network. There are two options for identifying the partnership for the report. You can enter a CSI number in the first pop-up window or enter a Global ID in the second pop-up window.

To export a report for a specific partnership, click on the **Export PDF Report – Search by ID** button under the “Run Partner Report” heading. As seen in Figure 4.9, an “Output To” window will appear which is used to designate a location and file name for the report. The default name of the report, “Partner_Level_Report”, can be changed. Use the navigation pane on the left-hand side of the window to select a folder to which the PDF report will be saved. Select the **Autostart** checkbox if you would like the report to be opened automatically when the export and save process is complete. Then click **OK**. Selecting **Cancel** will return you to the front page without exporting the report.

Figure 4.9: The Output To Window



As seen previously in Figure 4.2, the first pop-up window which appears will allow you to enter search criteria of CSI number. If known, enter the CSI number and press **OK**. If you would prefer to search by Global ID, enter nothing and click **OK** to skip the search by CSI number.

As seen previously in Figure 4.3, the second pop-up window which appears will allow you to enter search criteria of Global ID. If a CSI Number was already entered in the previous pop-up window, then enter nothing and click **OK** to skip the search by Global ID. If the CSI Number was not entered, then enter a Global ID for a partnership and press **OK** to continue.

After the partner ID search criteria are entered, the PDF file will be generated and the file will be saved in the selected location. If the **Autostart** checkbox was marked, a copy of the report will open in a PDF viewing application.