

**Transformation Accountability (TRAC)**  
Center for Mental Health Services

**NOMS Client-level Measures for Discretionary  
Programs Providing Direct Services**

**DISCHARGE REPORT GUIDE**



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*Version 1*

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## GENERAL OVERVIEW

The Discharge Report summarizes information about the number of discharges collected for a specified time (federal fiscal year and/or quarter) and the percentage that are conducted interviews and administrative records. For reference, the report will also list the total number of baseline records for the same time period.

This information allows project directors, grantee staff, government project officers (GPOs), and CMHS staff to manage grantees' performance in collecting discharge data.

Specifically, in this report you can find the following:

1. The number of discharge records entered in a selected Federal Fiscal Year (FFY) (and Quarter if chosen),
2. The percentage of the discharge records that are conducted interviews for the selected FFY (and Quarter if chosen),
3. The percentage of the discharge records where an interview was not collected (administrative records) for the selected FFY (and Quarter if chosen),
4. The total number of baseline records entered for the entire grant period to date,
5. The total number of discharge records entered for the entire grant period to date,
6. The percentage of the discharge records that are conducted interviews for the entire grant period to date,
7. The percentage of the discharge records where an interview was not collected (administrative records) for the entire grant period to date.

## SECTION A: KEY TERMS

This section presents brief definitions of terms used in the Discharge Report and in this guide.

**Grant ID** is the grant identification number assigned by CMHS.

**Grant Information** provides the grant name, city, state, grant start date, and grant end date.

**Program** refers to the CMHS grant program that the grant(s) in this report are a part of.

**Cohort** provides the number of the TRAC cohort for which the report displays information.

**Data entered as of** is the cut-off date for this report. This report is updated once every 24 hours, and includes all data entered as of the time it was last updated.

**Discharge** is a Services record submitted to TRAC where the Assessment is “Discharge”.

**Interview** is a record with “Yes” selected for question 2 in TRAC Record Management, “Was the interview conducted?”

**Administrative Record** is a record with “No” selected for question 2 in TRAC Record Management, “Was the interview conducted?”

**Grant Period** starts on the grant’s “Start Date” and ends on the grant’s “End Date”. These dates may differ depending on the grant. Each grant has its start and end dates stored into the TRAC system.

**Federal Fiscal Year (FFY)** is the accounting period of the federal government. It begins on October 1 and ends on September 30 of the next calendar year. Each fiscal year is identified by the calendar year in which it ends and commonly is referred to as “FFY.” For example, FFY 2010 began October 1, 2009, and ends September 30, 2010.

**FFY Quarter** consists of four quarters as follows:

Quarter 1: October 1 - December 31

Quarter 2: January 1 - March 31

Quarter 3: April 1 - June 30

Quarter 4: July 1 - September 30

**Role:** Your role in the TRAC system governs what you can view in the system. Some roles include project director, grantee staff, and government project officer (GPO). The general rule of thumb is that you can run reports for the grant(s) and/or grant program(s) you are associated with. For example, most grant project directors or grantee staff are associated with just one grant and would only see data for that grant.

## SECTION B: RUNNING THE REPORT

To run the **Discharge Report**, there are three steps:

1. Navigate to the Discharge Report
2. Select the criteria for the reports you wish to view (optional)
3. View the report

### Step 1: Navigate to the Report

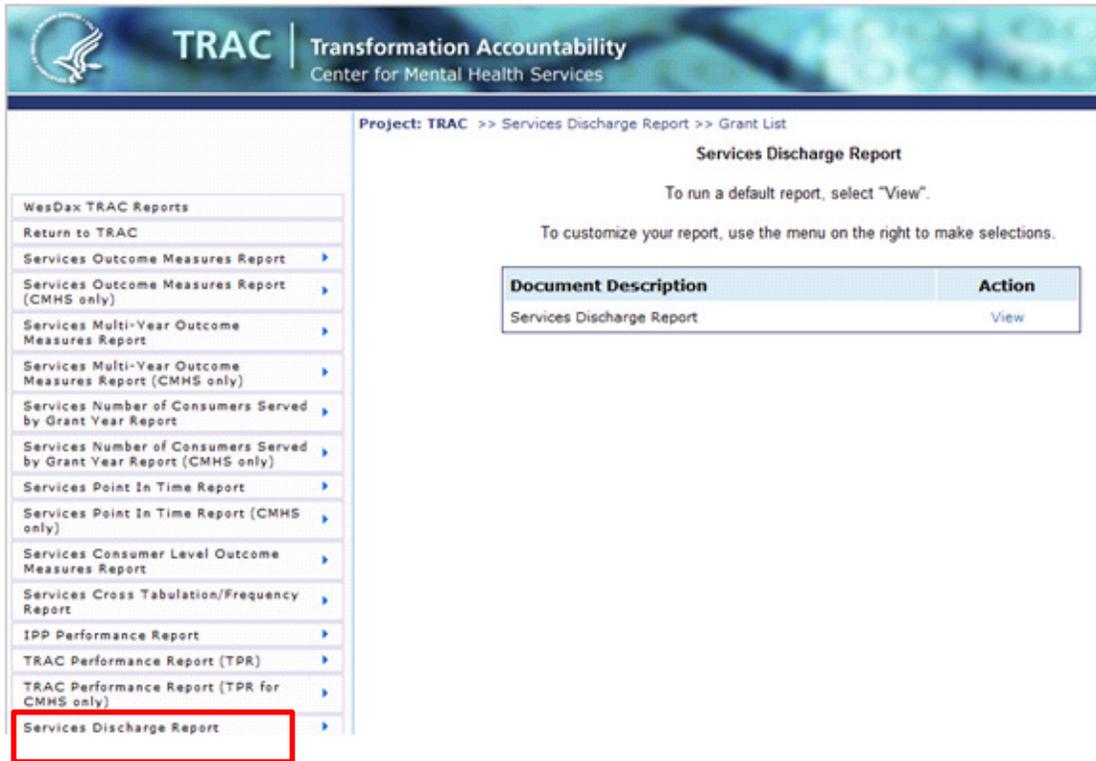
Select “Reports” on the homepage from the left menu bar.

Select the link for WesDax TRAC Reports System in the middle of the screen. The WesDax TRAC Report System will open in a new browser tab.

The screenshot shows the TRAC web application interface. The header includes the TRAC logo, the text "TRAC | Transformation Accountability Center for Mental Health Services", a "STAGING" badge, and user information: "User: Maureen Kelly" and "Roles: Admin". A "Print" button is visible in the top right. The left navigation menu lists: Home, General Info & Training, My Account, Contact Us, Admin, Data Entry, Reports (highlighted with a red box), Data Download, Change Password, and Logout. The main content area shows the breadcrumb "Home > Reports" and a "Print" button. Below the breadcrumb, the heading "Reports" is followed by a paragraph: "All reports are in the WesDax TRAC Reports System. When you click the link below, the WesDax TRAC Reports System will open in a new tab in your browser. You can return to TRAC by closing the WesDax TRAC Reports System tab. When you return to TRAC, your login may have expired. If that happens, just login again." A red box highlights the link "[WesDax TRAC Reports System](#)".

The WesDax TRAC Reports system is shown below. Select “Services Discharge Report” on the left menu. A submenu will appear. Choose whether you want to run the program by Program List or Grant List from the pop up.

- The Program List will let you run the report by all Programs or specific Programs.
- The Grant List allows you to run the report for all grants or specific grants (based on your access).



Once you have selected Program List or Grant List, the main report screen for the Discharge Report will appear.

**NOTE: To run a default report, just click “View.”**

You can skip step 2 (Select Criteria) for your report. You only need to select criteria if you want to customize your report by sorting or filtering it.

## Step 2: Select Criteria (optional)

You can set several criteria for the report. These criteria specify what data will be included in your report. To set criteria, use the pull-down menus and text boxes on the right hand side of the screen. The following report criteria are available.

### A. Output as

You can request your report in HTML, PDF, RTF or Excel formats. The default is PDF.

### B. Report By

You can group your report by All Combined, Program, Cohort or Grant. The default is Grant.

### C. Grant Status

You can run the report for active grants or all grants. Active grants include grants that have not yet ended. "All grants" includes grants that have ended. The default is active grants.

### D. FFY- Federal Fiscal Year

You can select any year from the start of TRAC to the current FFY. The default is the current FFY.

### E. FFY Quarter

You can select "all", Quarter 1, Quarter 2, Quarter 3 or Quarter 4. The default is "All".

### F. Grant Information contains

This is only applicable if you have selected Grant under Report By. You can enter text/keywords to filter the report. The default is blank, meaning the report will not be filtered by this criterion.

### G. Sort By

By default the report will sort by grant or program information. To change how the report is sorted, make a selection from the pull-down menu. The choices are FFY Number of Discharges, FFY Conducted Interview Rate, FFY Non-Conducted Discharge Rate, Cumulative number of Baselines, Cumulative Number of Discharges, Cumulative Conducted Interview Rate, and Cumulative Non-Conducted Discharge Rate.

### H. Sort Order

You can choose ascending (low to high) or descending (high to low) order for your sort. The default is ascending.

**I. Show Glossary**

If you want to review a glossary of terms for the report, select yes. The glossary items also appear in the “key terms” section of this guide. The default is to *not* show the glossary.

**J. Program or Grant**

This section lists the grants or programs you can run the report for. By default, all the grants or programs you have access to will be selected.

### Step 3: View the Report

Select “View” to generate the report. Your report will open in a separate window.

**Sample Report for Report by = Grant, Selected FFY = 2016, Selected FFY Quarter = All.**

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## Discharge Report

**Report By:** Grant

**Grant Status:** Active grants only

**FFY:** 2016

**FFY Quarter:** All Quarters

**Grant Information Contains:** N/A

**Sort By:** Default

**Sort Order:** Ascending

**Show Glossary:** No

**Selected Grant(s):** SM0001, SM0002

**Data entered as of:** March 23, 2016 07:24 AM EST

#### Notes:

1. This report is updated once every 24 hours, and includes all data entered as of the time it was last updated. Check the date and time at the top of this report to see when it was last updated.

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TRAC Help Desk: Telephone: 855-796-5777 or Email: [TRACHELP@westat.com](mailto:TRACHELP@westat.com)

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## Discharge Report

Program=ProgA

Grant ID	Grant Information	FFY16 Number of Discharges	FFY16 Discharge Interview Rate	FFY16 Discharge Administrative Record Rate	Cumulative Number of Baselines	Cumulative Number of Discharges	Cumulative Discharge Interview Rate	Cumulative Discharge Administrative Record Rate
SM0002	MH Center Rockville, MD 10/01/2014 – 09/30/2019	27	48.1%	51.9%	187	164	47.7%	52.3%
SM00001	MH Community Group Rockville, MD 10/01/2014 – 9/30/2019	23	47.8%	52.2%	163	142	55.1%	44.9%
	Total Grants: 2	50	48.0%	52.0%	456	548	59.6%	40.4%
	Program Summary: 59	1,037	49.4%	50.6%	15,207	13,168	83.9%	82.0%

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## SECTION C: USING THE REPORT

### What information is shown?

Reading the report from *left to right*, the report displays three pieces of information for your grant or program (as shown in the first column) for the selected FFY and four pieces of information for all years of your grant.

1. The number of discharge records that were received during the selected FFY (and Quarter if chosen),
2. The rate or percentage of discharge records that are conducted interviews for the selected FFY (and Quarter if chosen),
3. The rate or percentage of discharge records that are non-conducted interviews (administrative records) for the selected FFY (and Quarter if chosen),
4. The cumulative to date number of Baseline records across all years of the grant,
5. The cumulative to date number of Discharge records across all years of the grant,
6. The cumulative rate or percentage of discharge records that are conducted interviews for all years of the grant,
7. The cumulative rate or percentage of discharge records that are non-conducted interviews (administrative records) for all years of the grant.

Reading the report from *top to bottom*, the report shows the first four pieces of information described above (shown in the first row) for:

1. Each of your selected grant(s) or program(s) or cohort(s) individually
2. The total for all of your selected grant(s) or programs(s) or cohort(s)
3. Program Summary

## **THINGS TO REMEMBER / FREQUENTLY ASKED QUESTIONS**

- If you do not change any criteria and simply view the report, the default report will show data for the current FFY and all quarters for active grants only.
- If your user account was just created, you may not have access to this report for up to 36 hours.

## **ACCESSING HELP**

For technical support or questions about TRAC, please contact the TRAC Help Desk, located at Westat.

**Telephone:** 1-855-796-5777

**Email:** [TRACHELP@westat.com](mailto:TRACHELP@westat.com)

**Hours:** M-F 8:30 AM – 6:30PM (EST/EDT)

## APPENDIX A: TECHNICAL DETAILS

This appendix provides technical details about how the TRAC data was used to generate the Discharge Report. In this section, you can find information about how each of the columns in the report is defined.

### Definitions

1. **[FFY/FFY Quarter] Number of Discharges:** The total number of discharges submitted (conducted or non-conducted) within the selected FFY or FFY Quarter period.
2. **[FFY/FFY Quarter] Discharge Interview Rate:** The number of discharges submitted with the selected FFY or FFY Quarter period *with Interview Conducted* = “Yes”, divided by the total number of discharges submitted in that same period, then x 100 to calculate the percentage.
3. **[FFY/FFY Quarter] Discharge Administrative Record Rate:** The number of discharges submitted with the selected FFY or FFY Quarter period *with Interview Conducted* = “No”, divided by the total number of discharges submitted in that same period, then x 100 to calculate the percentage.
4. **Cumulative Number of Baselines:** The total number of baseline records (conducted or non-conducted) submitted for the entire grant period.
5. **Cumulative Number of Discharges:** The total number of discharges (conducted or non-conducted) submitted for the entire grant period.
6. **Cumulative Discharge Interview Rate:** The total number of discharges submitted in the entire grant period *with Interview Conducted* = “Yes”, divided by the total number of discharges submitted in the entire grant period, then x 100 to calculate the percentage.
7. **Cumulative Discharge Administrative Record Rate:** The total number of discharges submitted in the entire grant period *with Interview Conducted* = “No”, divided by the total number of discharges submitted in the entire grant period, then x 100 to calculate the percentage.