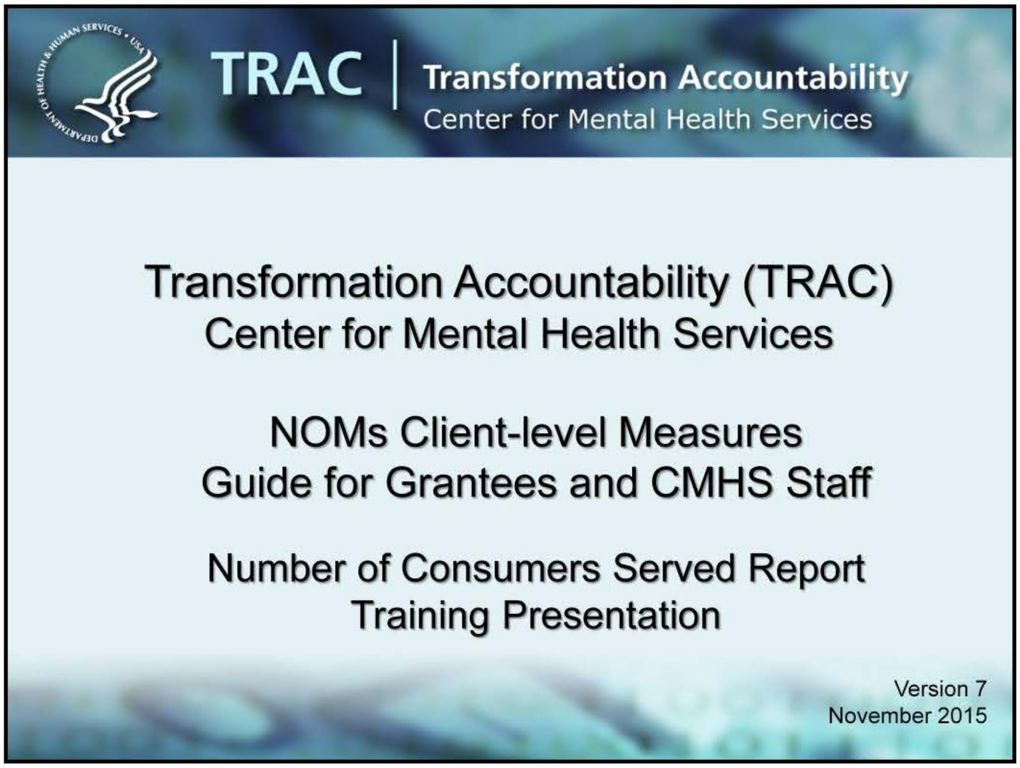


The purpose of this presentation is to train grantees on the specifics of the **Numbers of Consumers Served Report**.

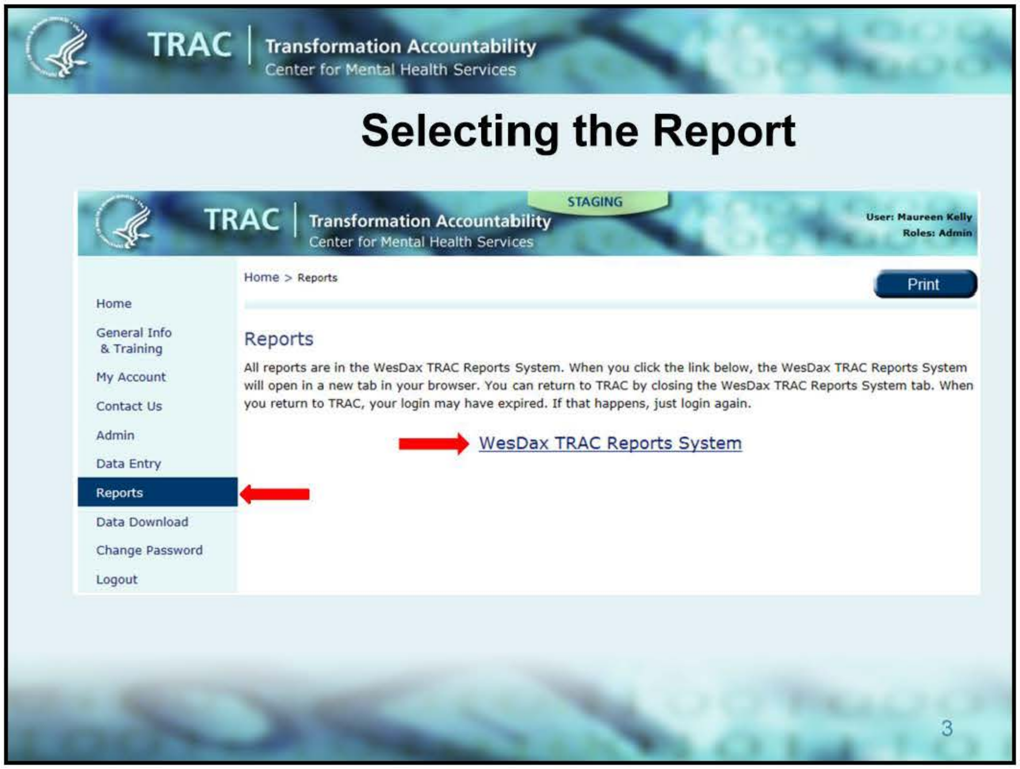
The Numbers of Consumers Served Report summarizes information about the number of consumers served by CMHS grants. For example, you can find out:

- how many consumers were served by your grant;
- the annual goal for your grant; and
- the percentage of the goal that has been met.

This information allows project directors, grantee staff, GPOs, and CMHS staff to assess how CMHS grants are doing in meeting the annual goal of the number of consumers served.

The data provided in this report includes:

- an unduplicated count of consumers served in the selected Grant Year and the year before;
- the annual goal of consumers to be served for the selected Grant Year and the year before;
- the percentage of the goal achieved for the selected Grant Year and the year before;
- an unduplicated count of consumers served since the start of the grant;
- the goal of all consumers to be served during the total grant period; and
- the percentage of the goal achieved since the start of the grant.



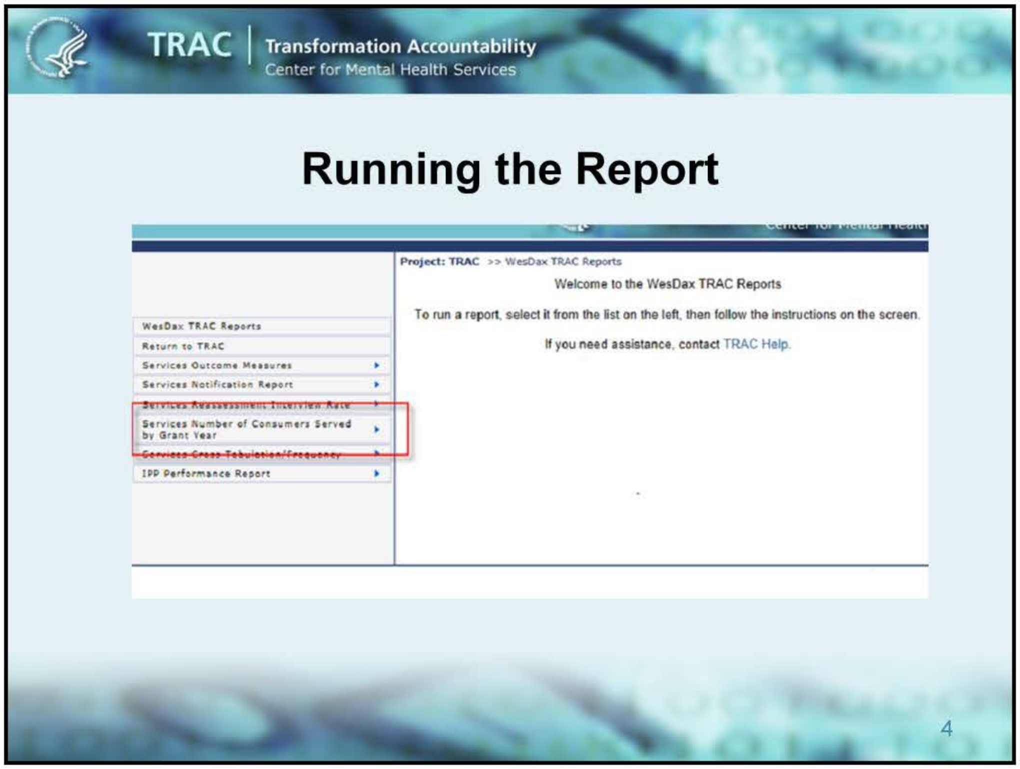
To **access this report**, click on Reports on the left menu of the main TRAC screen.

On the reports page, you'll see a table that summarizes all the available reports. This is for your reference only.

The reports are in another system, called the WesDax TRAC Reports System. To open it, click the link for the WesDax TRAC Reports System in the middle of the screen.

The WesDax TRAC Reports system will open in another browser tab.

While you are using the WesDax TRAC Reports system, your log-in in the TRAC system might expire. If this happens, just log-in again.

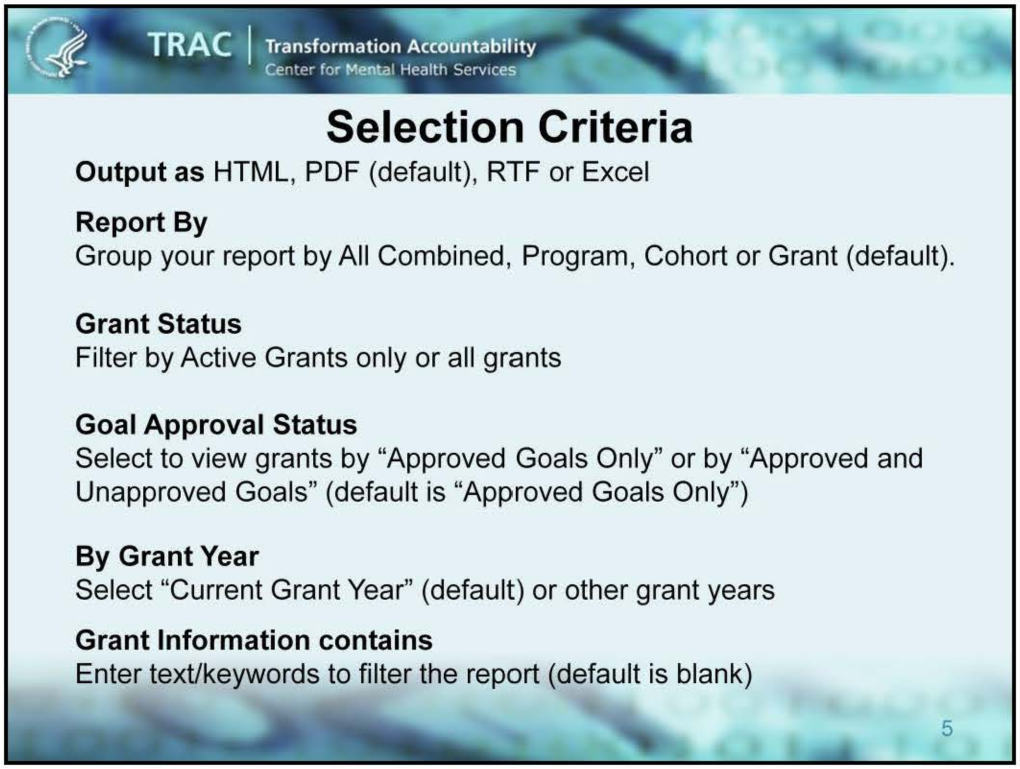


Select Services Number of Consumers Served Report on the left.

Select either Program List or Grant List depending on how you want to view the report. The Program List will show the report by Program and will allow you to select either all Programs or specific Programs (based on your access). The Grant List will show the report by Grant and will allow you to select all grants or specific grants (based on your access).

You can click the View hyperlink next to the report name to run a default report.

The right menu is a list of criteria you can select to customize your report. The next few slides will explain each criteria.



Output as You can output your report in HTML, PDF, RTF or Excel. The default is PDF.

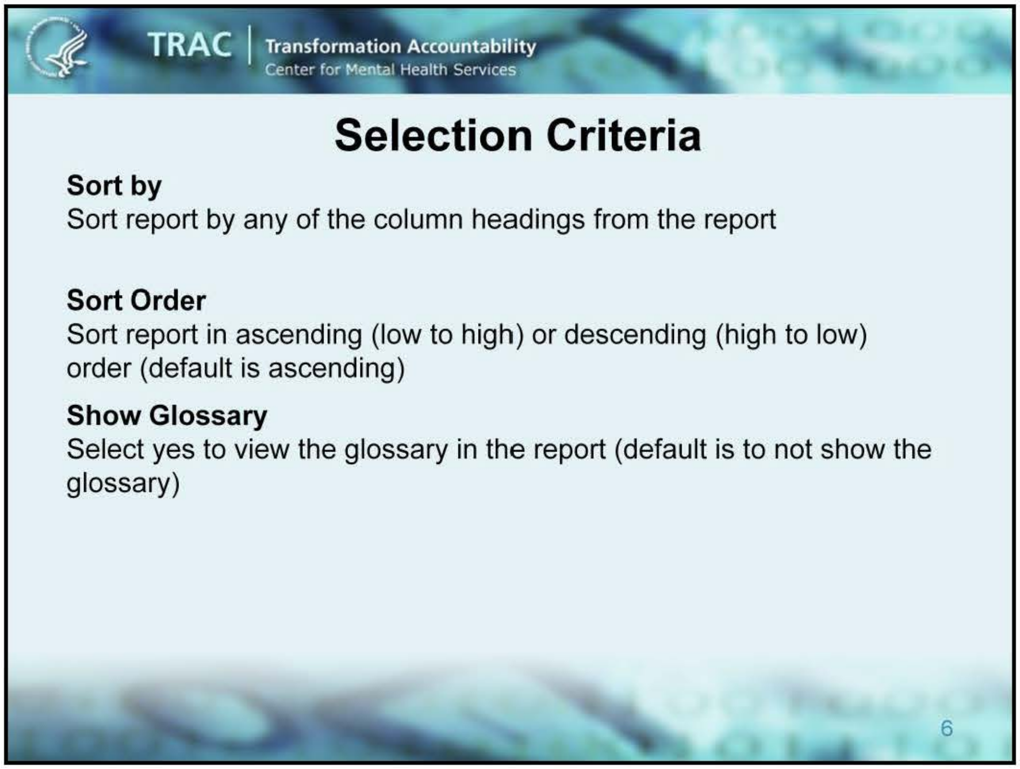
Report By
You can group your report by All Combined, Program, Cohort or Grant. The default is Grant.

Grant Status – If you have access to more than one grant, you can run the report by grant status by including only active grants, or all grants. An active grant is one that is still in progress, while an inactive one has ended. However, most users will only have access to one grant and it will be active.

Goal Approval Status
You can select to view grants by “Approved Goals Only” or by “Approved and Unapproved Goals”. The default is “Approved Goals Only”.

By Grant Year
You can select “Current Grant Year” or grant years from one to the number of grant years in TRAC for the grant. The default is the current Grant Year.

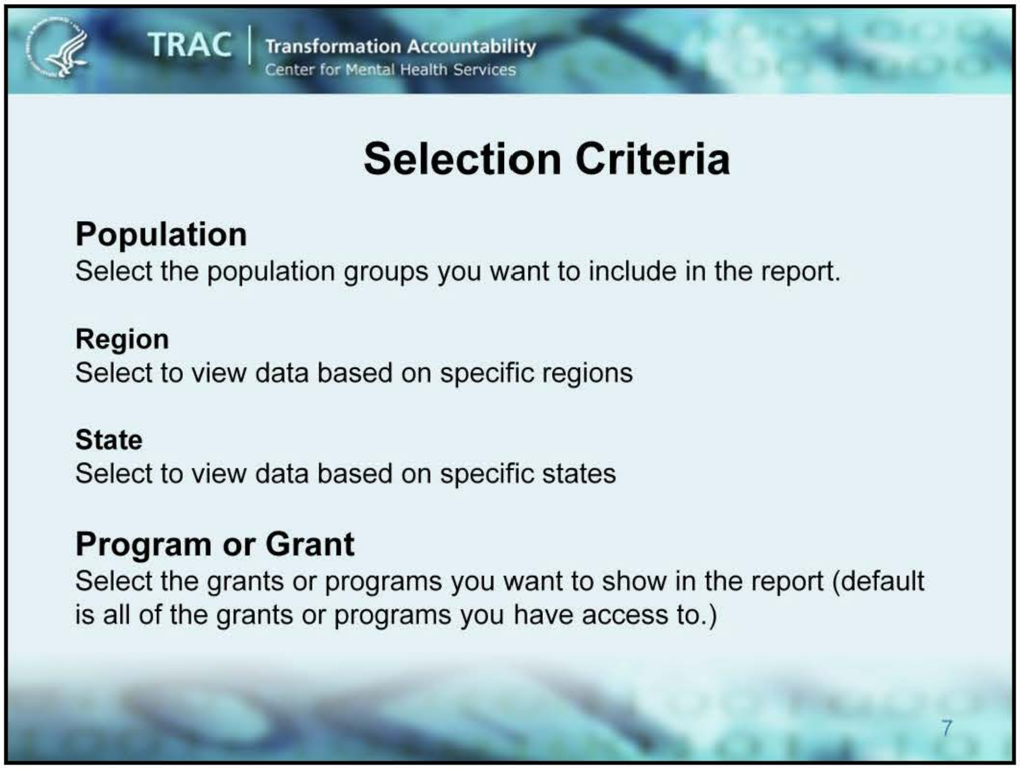
Grant Information contains
This is only applicable if you have selected Grant under Report By. You can enter text/keywords to filter the report. The default is blank, meaning the report will not be filtered by this criterion.



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 drop down will list all the column headings from the report.

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

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 the guide. The default is to *not* show the glossary.

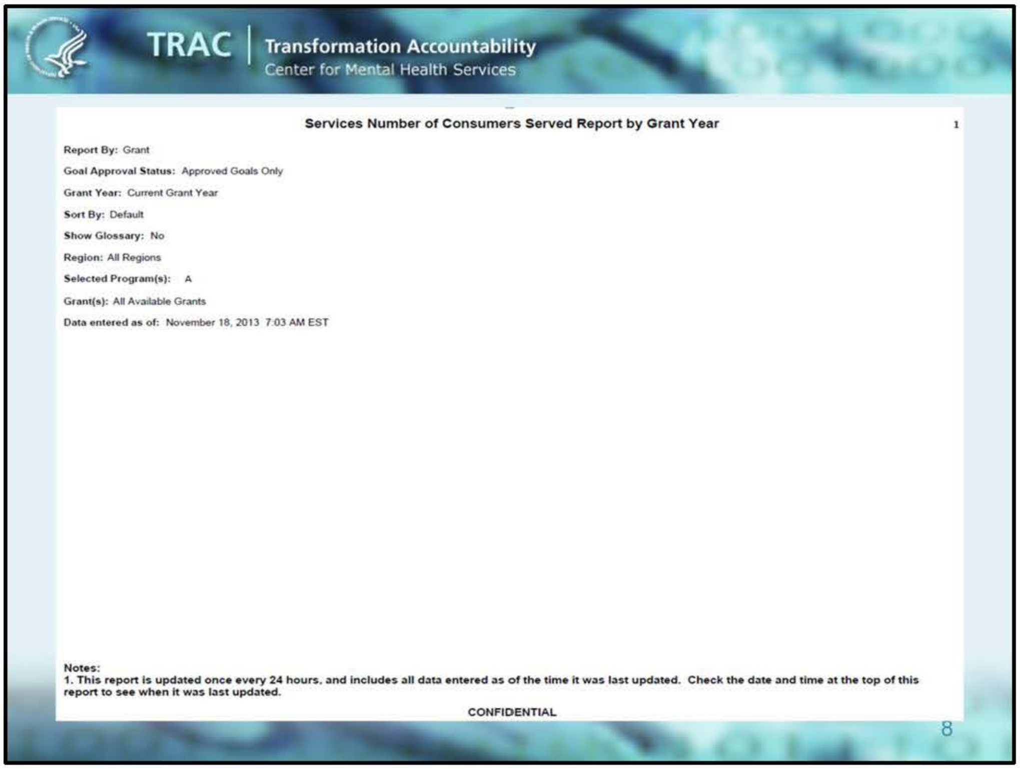


Population
Select the population groups you want to show in the report. For example: Males aged 16-25.

Region
This allows you to filter the report based on HHS regions. The default is all regions.

State
This allows you to filter the report based on states. The default is all states.

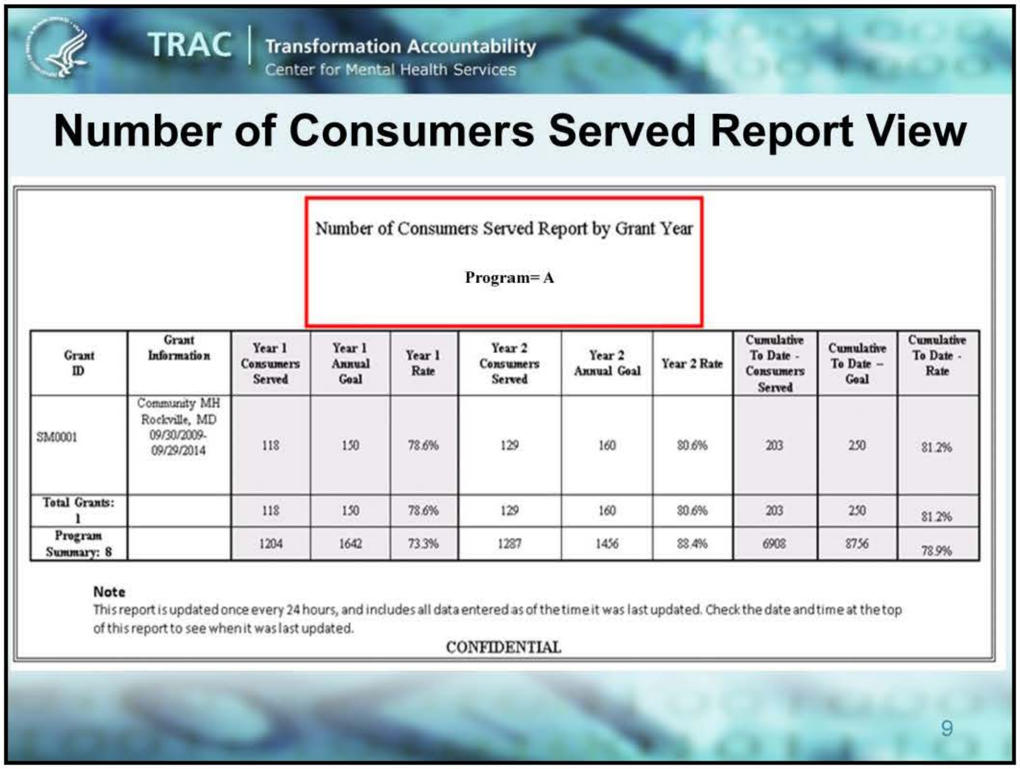
Program or Grant
Select the grants or programs you want to show in the report (The default is all the grants or programs you have access to.)



The **Report Cover Page** for this report displays**:**

- **The Selected Grant—**this will say either **ALL GRANTS** or list the **Grant IDs for the grants included in the report;**
- **Program Name;**
- **Selected Grant Year—**will display the grant year defined in the report filter;
- **Goal Approval Status-** will display if the report is showing only approved goals or both approved and unapproved goals; and
- **Data entered as of-** this will show the date and time the report was last updated. The report is updated once every 24 hours.

Take special note of the line that says “data entered as of” and the footnote at the bottom of the report. This report is generated once every 24 hours, and this line shows the cut off for data that are included in the report. If you enter a new baseline interview in the TRAC system at noon Eastern time, you won’t see it reflected in your rate until the next day.



Number of Consumers Served Report by Grant Year

Program= A

Grant ID	Grant Information	Year 1 Consumers Served	Year 1 Annual Goal	Year 1 Rate	Year 2 Consumers Served	Year 2 Annual Goal	Year 2 Rate	Cumulative To Date - Consumers Served	Cumulative To Date – Goal	Cumulative To Date - Rate
SM0001	Community MH Rockville, MD 09/30/2009-09/29/2014	118	150	78.6%	129	160	80.6%	203	250	81.2%
Total Grants: 1		118	150	78.6%	129	160	80.6%	203	250	81.2%
Program Summary: 8		1204	1642	73.3%	1287	1456	88.4%	6908	8756	78.9%

Note
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.

CONFIDENTIAL

This is an example of the **Number of Consumers Served Report**.

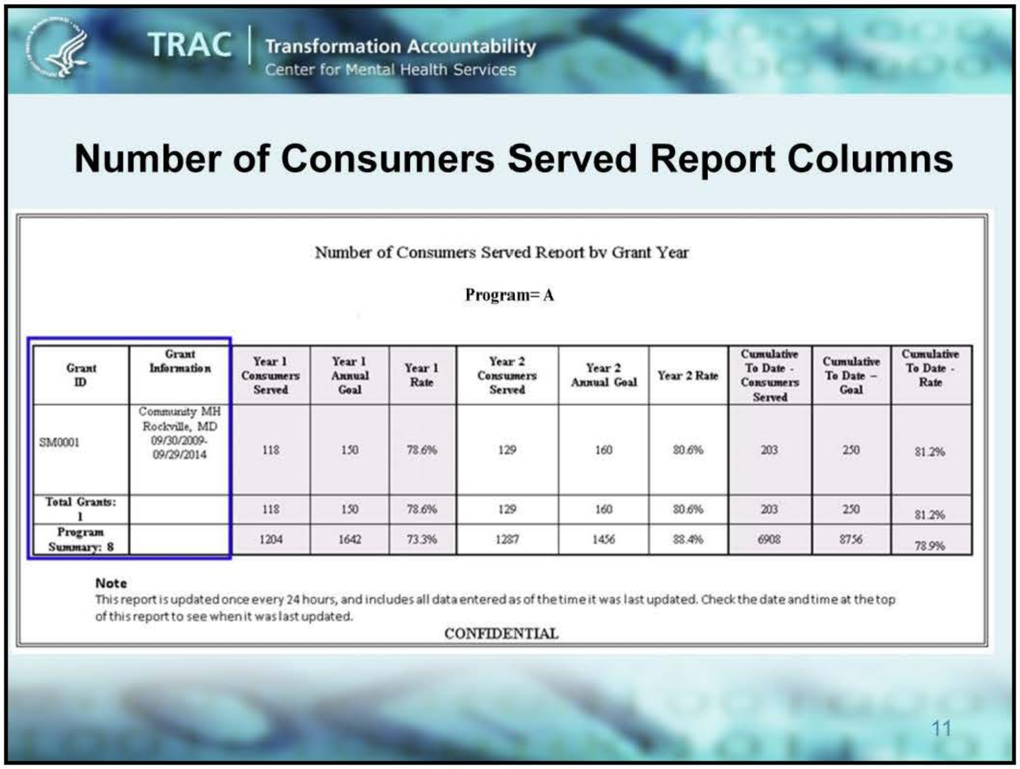
To print the report output select PRINT from your web browser's File Menu or use the PRINT button in the browser's toolbar.

PLEASE NOTE: The Number of Consumers Served Report automatically displays the number of consumers served, annual goal, and rate for both the grant year selected, AND the year before for comparison. As you can see in this example, I have selected the Grant Year 2 to be the focus of the report, but the report also is displaying the same information for Grant Year 1.

In the next few slides, we will **go through each of the report column definitions and interpretations**.

The **column headings for this report are**:

- Grant or Program Information.
- Consumers Served – separately for selected grant year, the year before and cumulatively to-date.
- Goal – separately for selected grant year, previous grant year and cumulative to-date.
- Rate.



Number of Consumers Served Report by Grant Year

Program= A

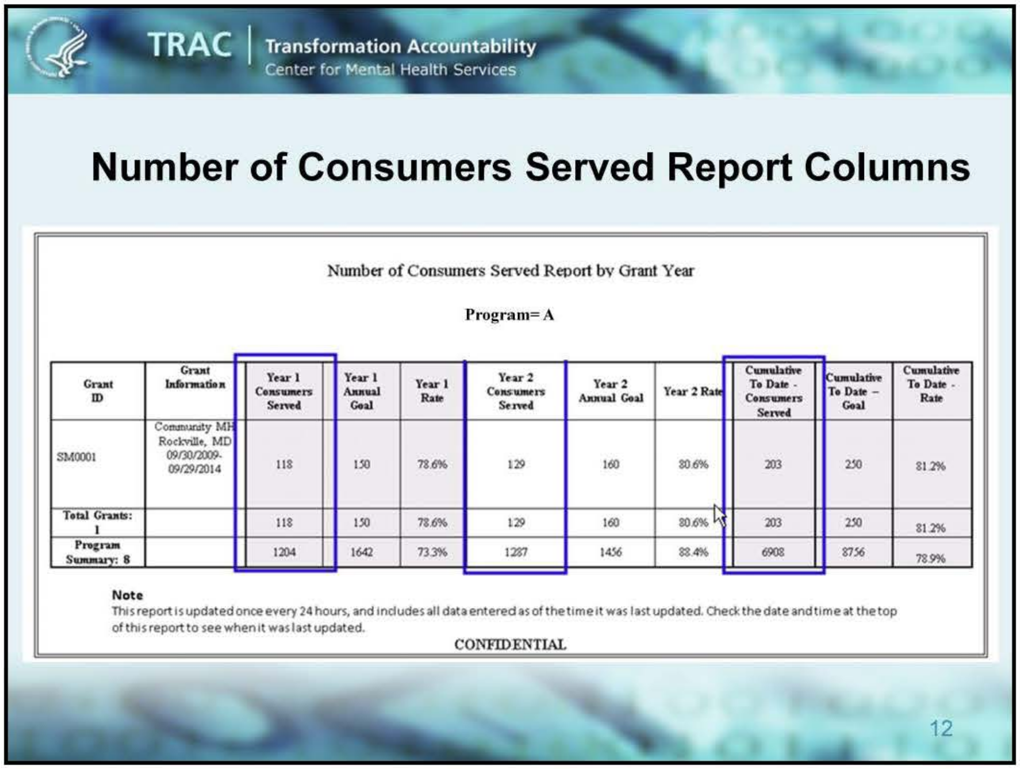
Grant ID	Grant Information	Year 1 Consumers Served	Year 1 Annual Goal	Year 1 Rate	Year 2 Consumers Served	Year 2 Annual Goal	Year 2 Rate	Cumulative To Date - Consumers Served	Cumulative To Date – Goal	Cumulative To Date - Rate
SM0001	Community MH Rockville, MD 09/30/2009-09/29/2014	118	150	78.6%	129	160	80.6%	203	250	81.2%
Total Grants: 1		118	150	78.6%	129	160	80.6%	203	250	81.2%
Program Summary: 8		1204	1642	73.3%	1287	1456	88.4%	6908	8756	78.9%

Note
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.

CONFIDENTIAL

Since the report is by grant, the first column indentifies the **grant number and the second column the grantee organization name** (not the grant title), **the city and state and the target period as appropriate**.

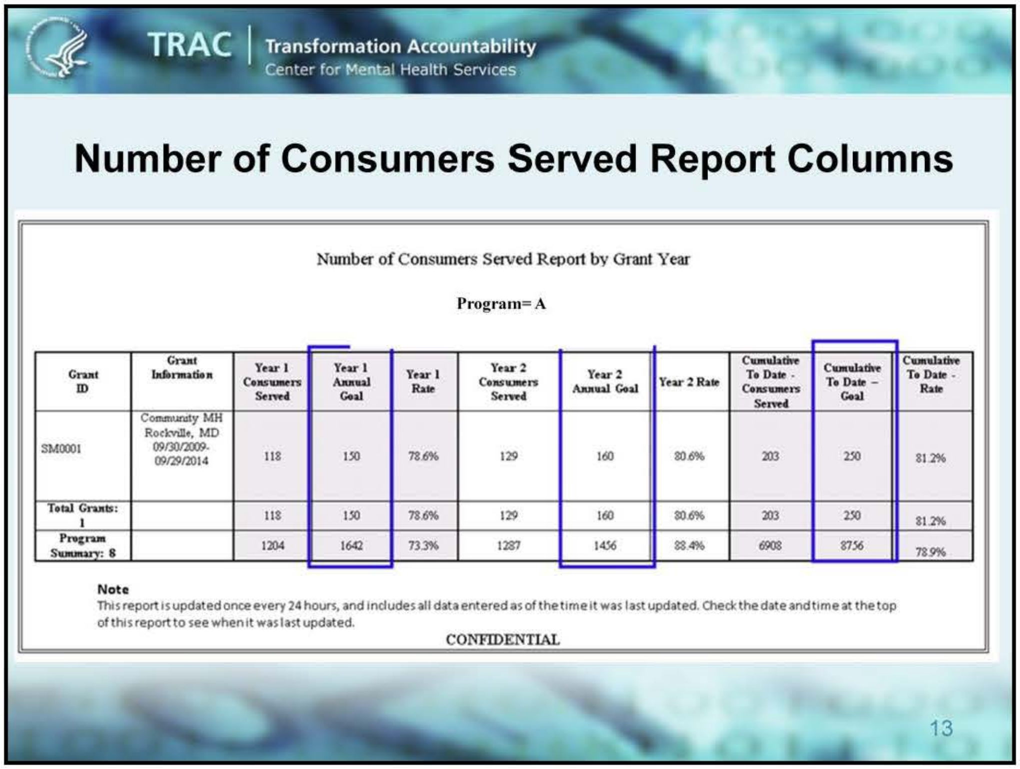
If the **report is by program**, this column **identifies the program name(s)**.



Grant ID	Grant Information	Year 1 Consumers Served	Year 1 Annual Goal	Year 1 Rate	Year 2 Consumers Served	Year 2 Annual Goal	Year 2 Rate	Cumulative To Date - Consumers Served	Cumulative To Date – Goal	Cumulative To Date - Rate
SM0001	Community MH Rockville, MD 09/30/2009-09/29/2014	118	150	78.6%	129	160	80.6%	203	250	81.2%
Total Grants: 1		118	150	78.6%	129	160	80.6%	203	250	81.2%
Program Summary: 8		1204	1642	73.3%	1287	1456	88.4%	6908	8756	78.9%

CONSUMERS SERVED - represents a **<u>unique count of all consumers</u>.** This means that if a consumer has more than one episode of care within a grant year, he/she will only be counted once in each of the columns in this report. For the purposes of the Number of Consumers Served Report, this information is provided for the selected Grant Year, the previous grant year and cumulatively**.**

This count includes both consumers who have completed a face-to-face interview, and those who were unable to complete an interview, but for whom you have entered a baseline record.



Number of Consumers Served Report by Grant Year

Program= A

Grant ID	Grant Information	Year 1 Consumers Served	Year 1 Annual Goal	Year 1 Rate	Year 2 Consumers Served	Year 2 Annual Goal	Year 2 Rate	Cumulative To Date - Consumers Served	Cumulative To Date – Goal	Cumulative To Date - Rate
SM0001	Community MH Rockville, MD 09/30/2009-09/29/2014	118	150	78.6%	129	160	80.6%	203	250	81.2%
Total Grants: 1		118	150	78.6%	129	160	80.6%	203	250	81.2%
Program Summary: 8		1204	1642	73.3%	1287	1456	88.4%	6908	8756	78.9%

Note
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.

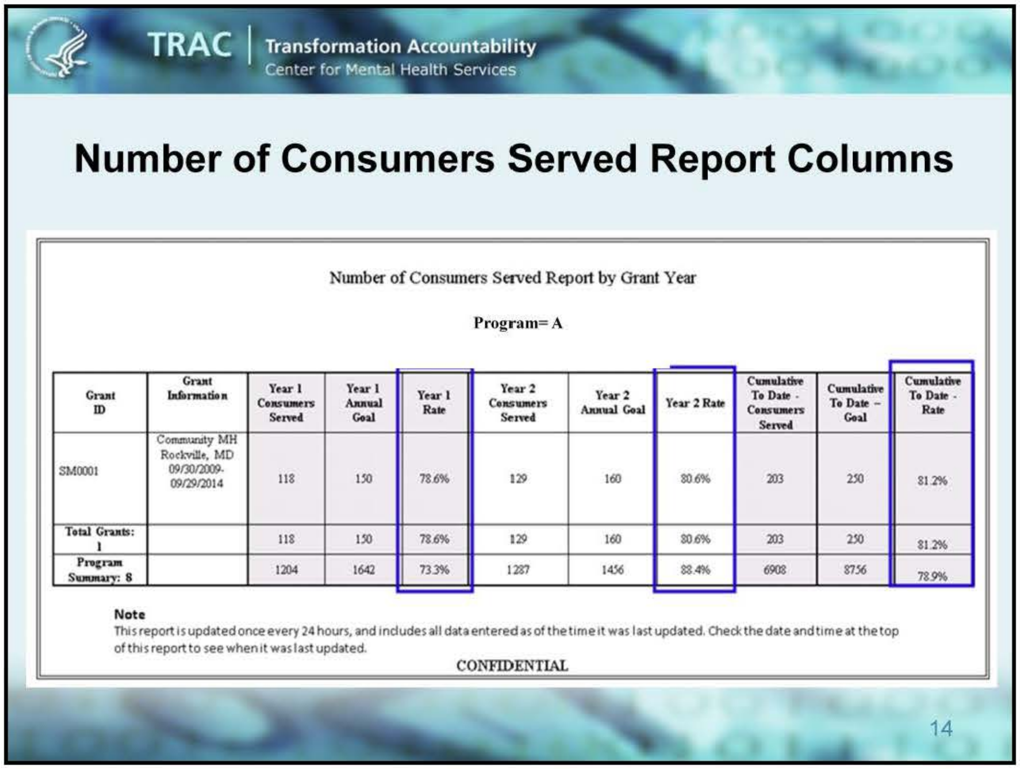
CONFIDENTIAL

The report also includes two types of goals.

- **ANNUAL GOAL -** represents an unduplicated count of consumers **to be** served during a specific Grant Year. As I mentioned previously, when the Number of Consumers Served Report is run, it will automatically include the Annual Goal for both the selected grant year, as well as the year before.

- **CUMULATIVE TO DATE – GOAL** – represents an unduplicated count of consumers **to be** served during the entire length of a project.

PLEASE NOTE: Goal and Rate will display as “0” and “Not Applicable,” respectively, on the report until the goal has been set by the grantee and GPO.



Number of Consumers Served Report by Grant Year

Program= A

Grant ID	Grant Information	Year 1 Consumers Served	Year 1 Annual Goal	Year 1 Rate	Year 2 Consumers Served	Year 2 Annual Goal	Year 2 Rate	Cumulative To Date - Consumers Served	Cumulative To Date – Goal	Cumulative To Date - Rate
SM0001	Community MH Rockville, MD 09/30/2009-09/29/2014	118	150	78.6%	129	160	80.6%	203	250	81.2%
Total Grants: 1		118	150	78.6%	129	160	80.6%	203	250	81.2%
Program Summary: 8		1204	1642	73.3%	1287	1456	88.4%	6908	8756	78.9%

Note
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.

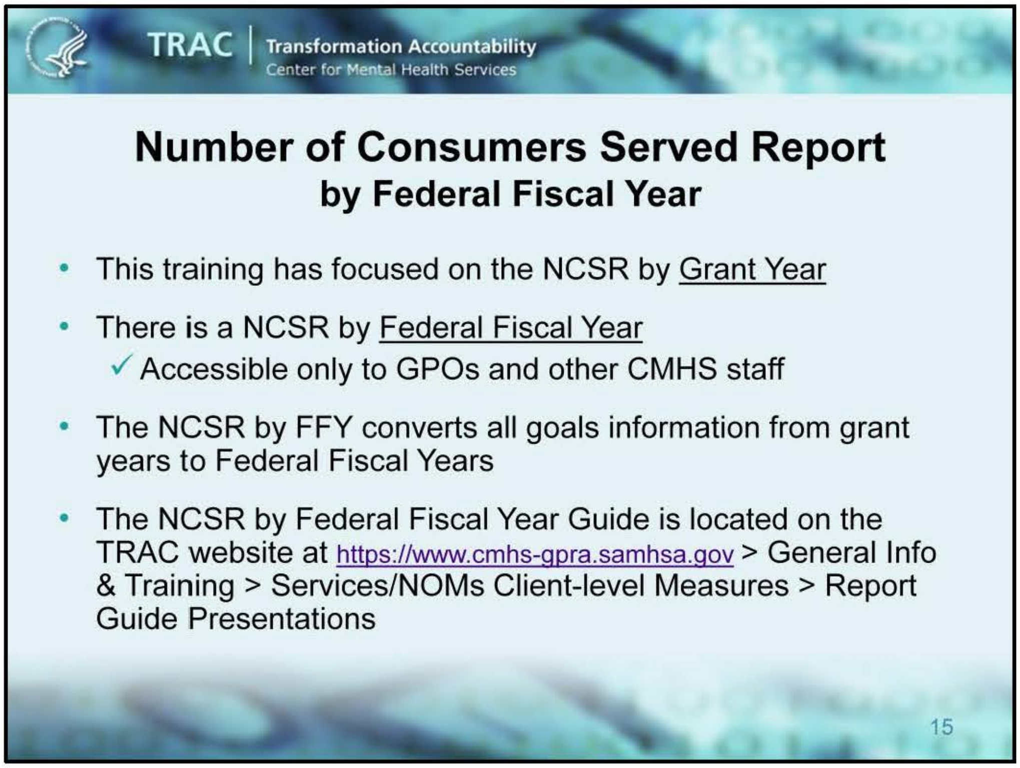
CONFIDENTIAL

RATE (Grant Year) – is the total **number of unduplicated consumers served in a selected grant year**, divided by the **Annual Goal for that grant year**, **multiplied by 100** to determine the percentage rate.

The report displays the rate for the selected Grant Year and the previous year, for comparison.

Rate (Cumulative To Date) – is calculated as the “Consumers Served (Cumulative To Date)” column divided by the “Goal (Cumulative To Date)” column and multiplied by 100 to calculate a percentage.

The rates will be bolded and in **red font** if “**consumers served**” is not at, or above, the level of the “**expected goal**” (or 100% once the year is over).



The version of the Number of Consumers Served Report we just reviewed displays goal data by <u>Grant Year</u>. This is the only version of the report available to grantee staff. However, there is a version of the report that uses <u>Federal Fiscal Year</u>, which converts all the goals information from Grant Year to Federal Fiscal Year. That version is only available to GPOs and CMHS staff members.

While there is no specific training provided for that report, there is a report guide available for it on the TRAC website under “Services/NOMs Client-level Measures>Report Guides & Presentations” heading which is under “General Info & Training”.

If you have any other questions please contact the TRAC Help Desk.

Help Desk hours of operation are from 8:30am to 6:30pm ET by telephone or email.