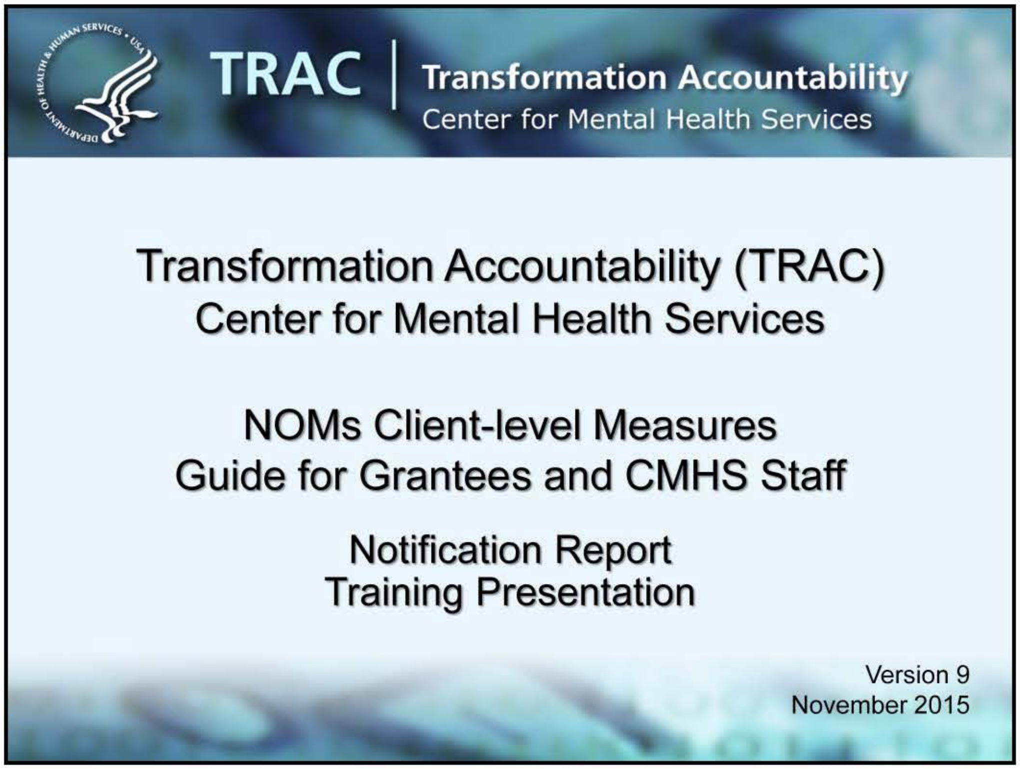
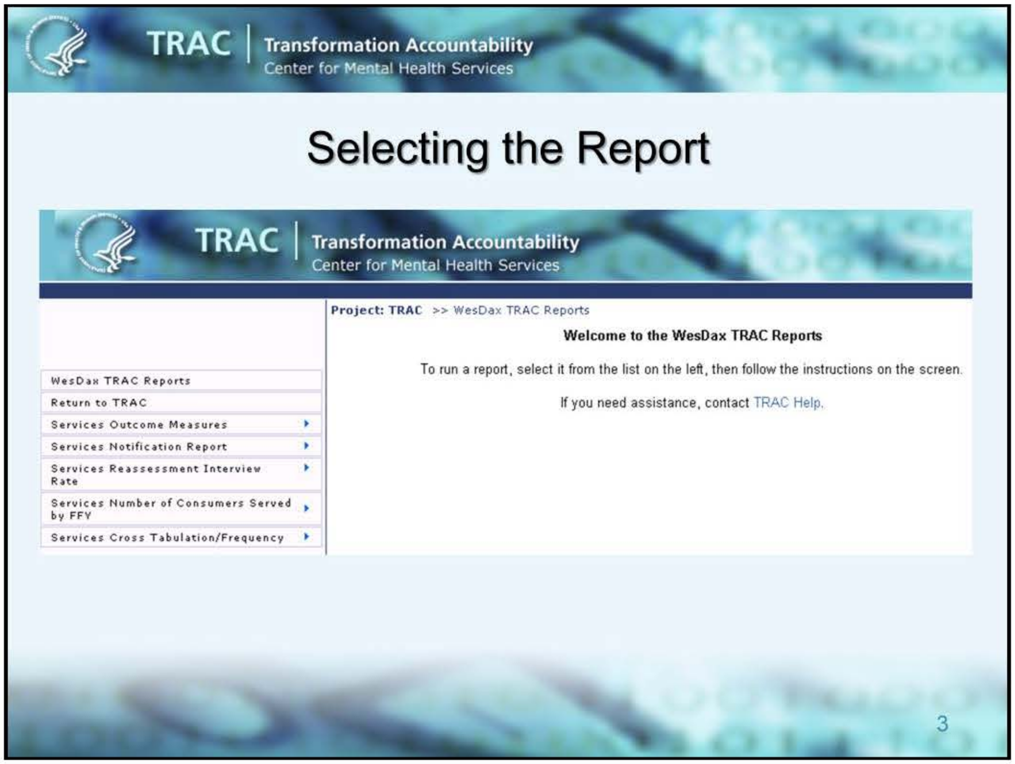


The training will present the details of the **Notification Report**.

The **Notification Report** is available for grantees to track when reassessment interviews are due for consumers. The report only includes consumers who are currently due for a reassessment.

This report provides information on:

- the number of **reassessments currently due**,
- **which consumers are due** for a reassessment, and **which type**,
- the **date of the Baseline Interview**,
- the **reassessment due date**, and
- the **reassessment eligibility window**.



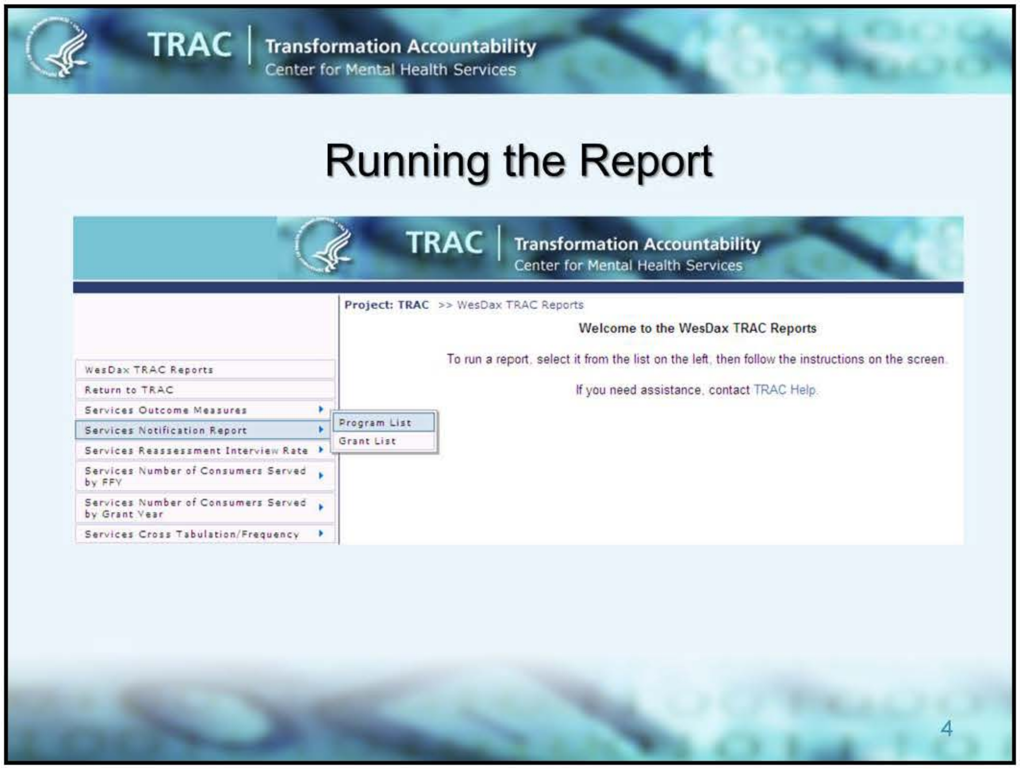
To **access this report**, click on Reports on the left menu of the main TRAC screen.

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 Notification Report on the left side of the WesDax TRAC Reports menu.

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).

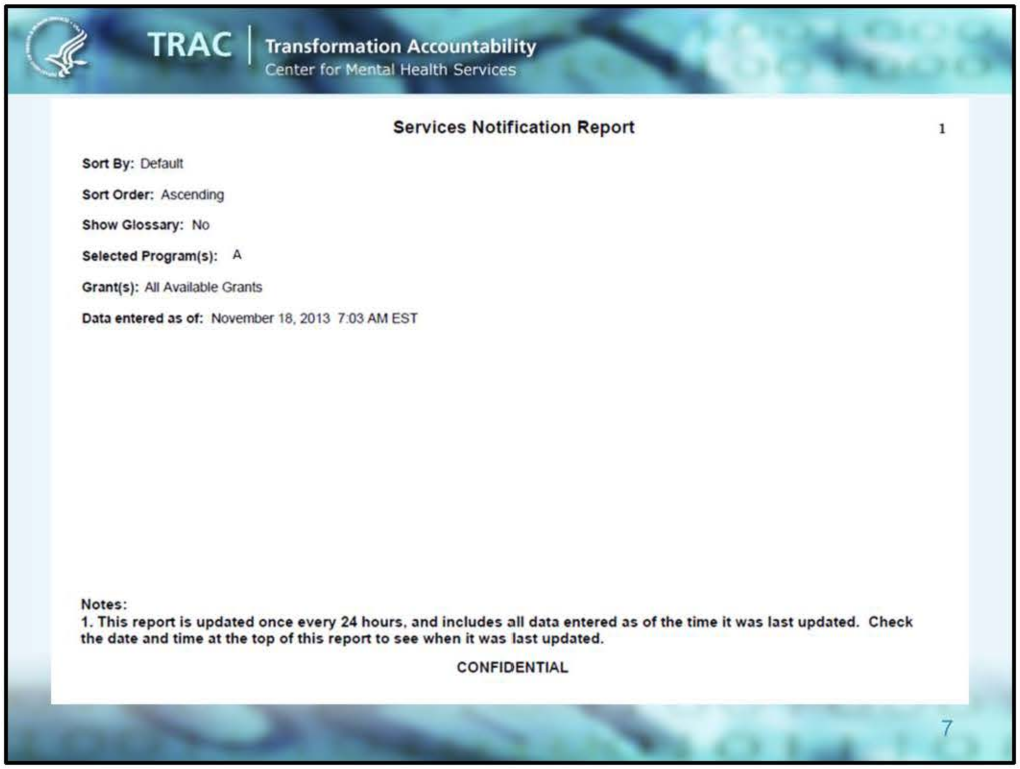
There are 4 tables in the Notification Report:

- Reassessment Interviews Due.
- Administrative Reassessments Due.
- Administrative Discharges Pending (No Data or Consumer Refused All Interviews).
- Open Consumers.

Reassessment Interviews Due.

This table shows the reassessment interviews that are due every 6 months or 180 days. This is the most common use of the Notification Report, and for most grantees is the only relevant table.

This table contains the information most relevant to you for tracking reassessments and is the table you will use most often when running this report.



The first thing to note is the date and time in the header. This report is updated once every 24 hours at Westat. This date and time tells you the last time it was updated. If you make changes to your data (for example, if you enter a reassessment interview) it will not be reflected in the report until the next time the report is updated.

TRAC | Transformation Accountability
Center for Mental Health Services

Reassessment Interview Table Sample

TRAC Services Notification Report
Program: Sample
Grant ID: SM99999

Reassessment Interviews Due
Interview these consumers every 6 months (180 days) until discharged.
(Note: Administrative Reassessments will not remove the consumer from the Reassessment Interviews Due section.)

Consumer ID	Baseline Interview Date	Reassessment	Earliest Date of Eligibility	Due Date	Latest Date of Eligibility
999991	11/19/2008	30th-month	4/8/2011	5/8/2011	6/7/2011
999992	5/20/2009	24th-month	4/10/2011	5/10/2011	6/9/2011
999993	5/24/2009	24th-month	4/14/2011	5/14/2011	6/13/2011
999994	6/4/2008	36th-month	4/20/2011	5/20/2011	6/19/2011
999995	6/8/2008	36th-month	4/24/2011	5/24/2011	6/23/2011
999996	6/13/2008	36th-month	4/29/2011	5/29/2011	6/28/2011

Please note: All information is simulated.

8

This is a sample Reassessment Interview Due table.

I’m going to describe each column in the table to you.

Consumer ID is a unique consumer identifier that is determined by the grantee. These consumers have a reassessment interview due.

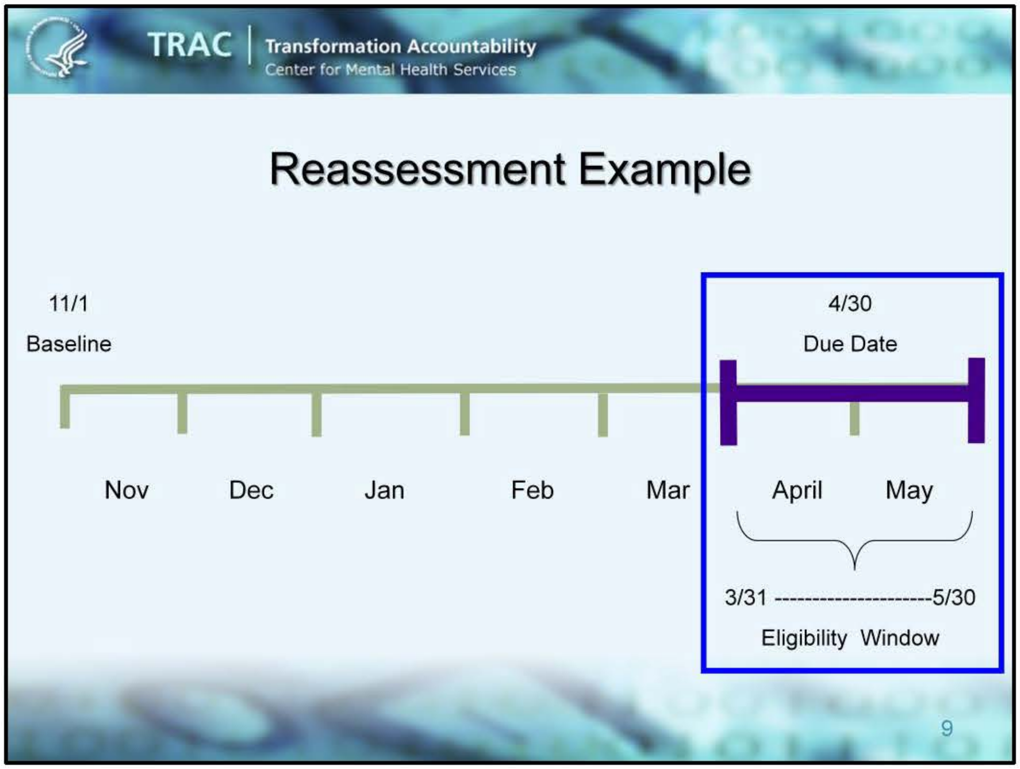
Baseline Interview Date is the date on which the TRAC Services client-level baseline was conducted or attempted.

Reassessment identifies the type of reassessment interview that is due.

Earliest Date of Eligibility is 30 calendar days prior to the reassessment due date. This is the earliest date on which you can conduct a reassessment and have it be counted toward your reassessment interview rate.

Due Date is the date on which the reassessment is due.

Latest Date of Eligibility for Reassessment is 30 calendar days after the Reassessment due date. This is the latest date on which you can conduct a reassessment and have it be counted toward your reassessment interview rate.



This slide shows the timeline for a 6-month reassessment.

Here, the consumer completed a Baseline on November 1st. The due date for this consumer's 6th month reassessment is April 30th. This consumer will appear on the **Notification Report** once the window of eligibility opens on March 31st (30 days before the actual due date)—and will remain on the notification report until either a reassessment interview is entered or until the date the window of eligibility closes (30 days after the actual due date), or in this case—May 30th.

The consumer **will be removed from the Notification Report** once:

1. You **complete and enter a reassessment interview** that was <u>conducted within the window of eligibility</u>;

2. You **enter a discharge record** for the consumer;

3. You **enter an Administrative Reassessment record <u>with the answer "NO" for question 1 in Section I: Reassessment Status, indicating that you or other grant staff have not had contact with the consumer within the last 90 days</u>**; **OR**

4. **The window of eligibility has closed.**

PLEASE NOTE: that a consumer **will remain on the Notification Report** even if you submit an **Administrative Reassessment.** The reason for this is that there is an opportunity to conduct an interview with the consumer (e.g., consumer may change his/her mind). If the status for such an interview does not change—it will be removed from the notification report once the window of eligibility closes.

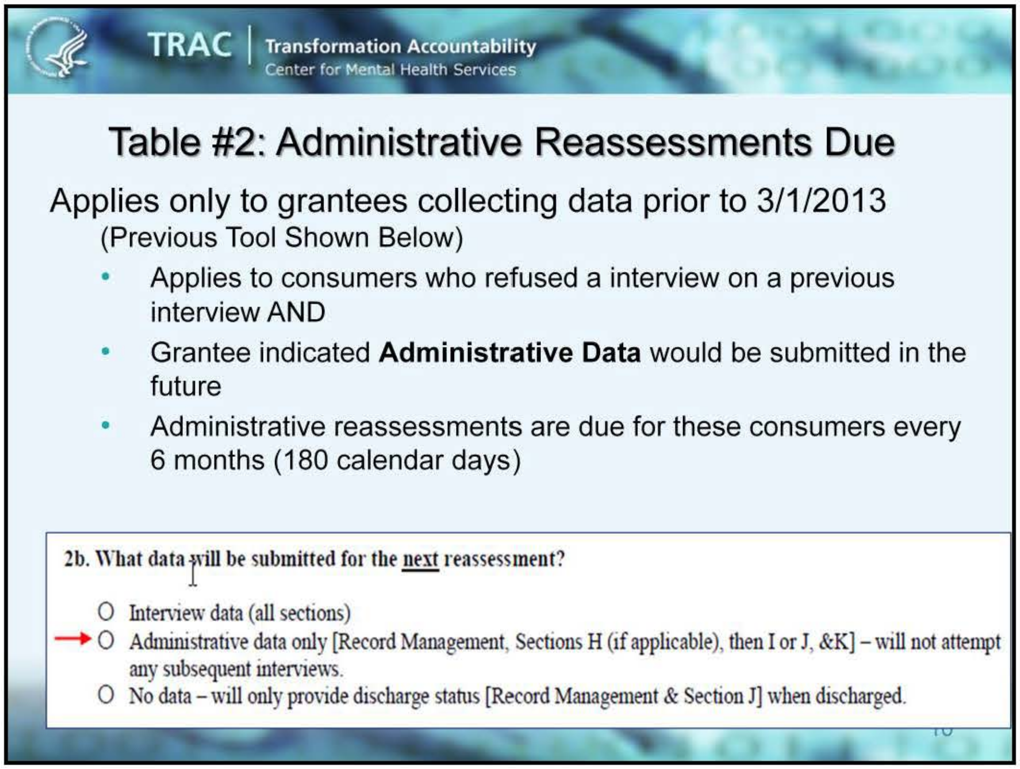
However, this will not be the case if you submit an Administrative record indicating that the "Consumer Refused All interviews" as of 3/1/2013 or later.

This only applies to Grantees who were collecting the 'old tool' (prior to 3/1/2013).

Additionally, however, this will not be the case if you submitted an Administrative Reassessment prior to 3/1/2013, indicating either that the consumer "Refused the interview", you were "Not able to obtain consent from proxy" or the "Consumer was impaired/unable to provide consent" **AND** that no data will be submitted for future assessments).

REMEMBER THAT:

- If you are able to conduct an interview with a consumer after you've entered an Administrative Reassessment you will need to delete that administrative reassessment in order to enter the interview in the TRAC system. You now have the ability to delete your own data in the system.



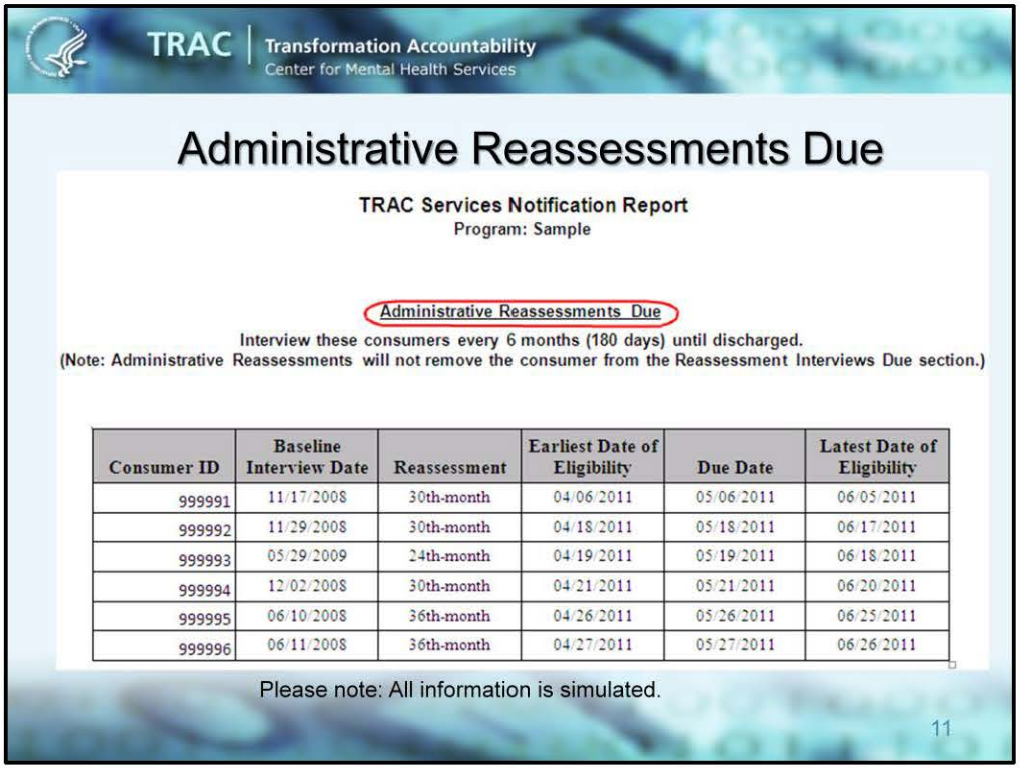
The second table in the Notification Report is the Administrative Reassessments Due.

If your grant started collecting data **after 3/1/2013,** you will **not see data for this table** and can **ignore this slide**. Systems of Care Expansion Implementation grants need not worry about this but we do understand that some of you are on grants under other programs, as well.

If your grant started data collection **prior to 3/1/2013** this table applies to the version of the tool being used at that time.

- This table applies to consumers who refused the interview-during a previous interview that you indicated you would submit administrative data for in the future.

- Administrative reassessments are still due for these consumers every 6 months or 180 days. This table shows when those **administrative reassessments** are due.



Consumer ID	Baseline Interview Date	Reassessment	Earliest Date of Eligibility	Due Date	Latest Date of Eligibility
999991	11/17/2008	30th-month	04/06/2011	05/06/2011	06/05/2011
999992	11/29/2008	30th-month	04/18/2011	05/18/2011	06/17/2011
999993	05/29/2009	24th-month	04/19/2011	05/19/2011	06/18/2011
999994	12/02/2008	30th-month	04/21/2011	05/21/2011	06/20/2011
999995	06/10/2008	36th-month	04/26/2011	05/26/2011	06/25/2011
999996	06/11/2008	36th-month	04/27/2011	05/27/2011	06/26/2011

This is a sample of the Administrative Reassessment table.

Like the first table, the header shows the date and time that the report was updated.

I'm going to describe each column in the table to you.

Consumer ID is a unique consumer identifier that is determined by the grantee. These consumers have a reassessment interview due.

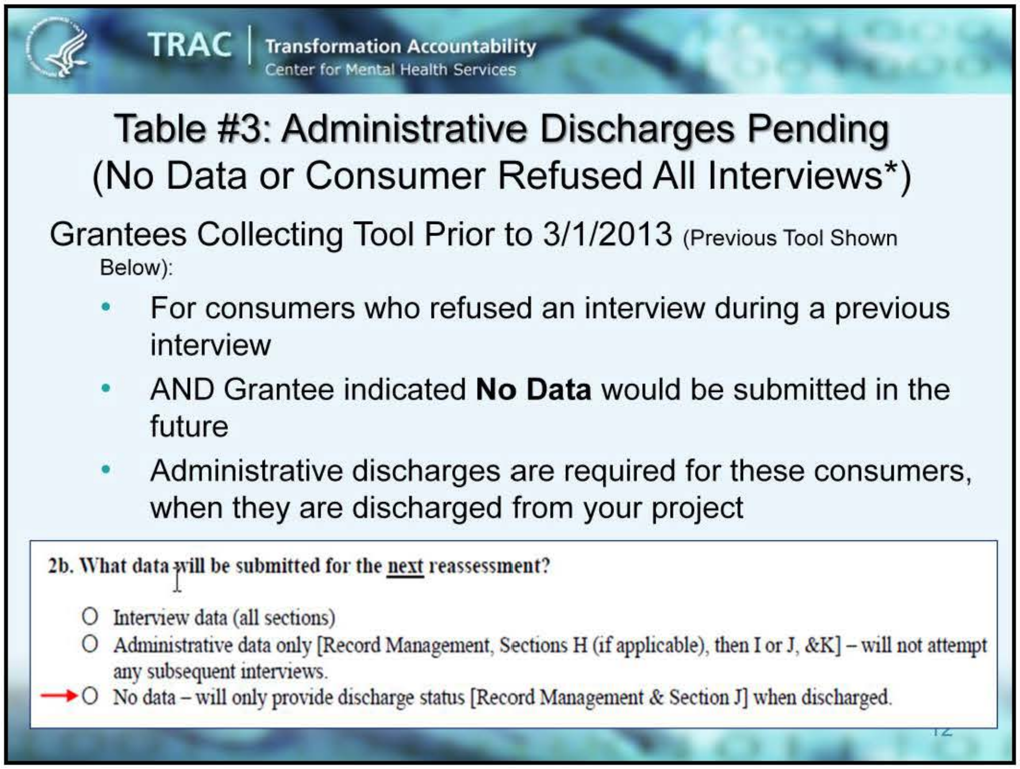
Baseline Interview Date is the date on which the TRAC Services client-level baseline was conducted or attempted.

Reassessment identifies the type of reassessment interview that is due.

Earliest Date of Eligibility is 30 calendar days prior to the reassessment due date. This is the earliest date on which you can conduct a reassessment and have it be counted toward your reassessment interview rate.

Due Date is the date on which the reassessment is due.

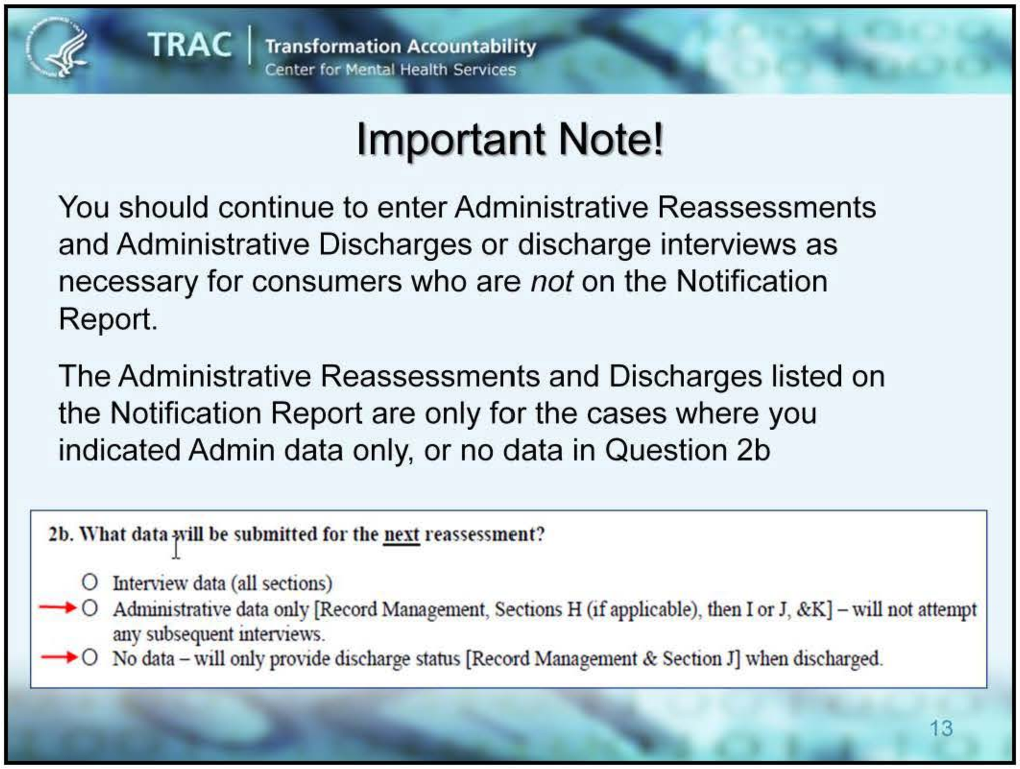
Latest Date of Eligibility for Reassessment is 30 calendar days after the Reassessment due date. This is the latest date on which you can conduct a reassessment and have it be counted toward your reassessment interview rate.



The third table in the Notification Report is the Administrative Discharges Pending table. This table shows two types of information depending upon the version of the tool that was being used to collect it.

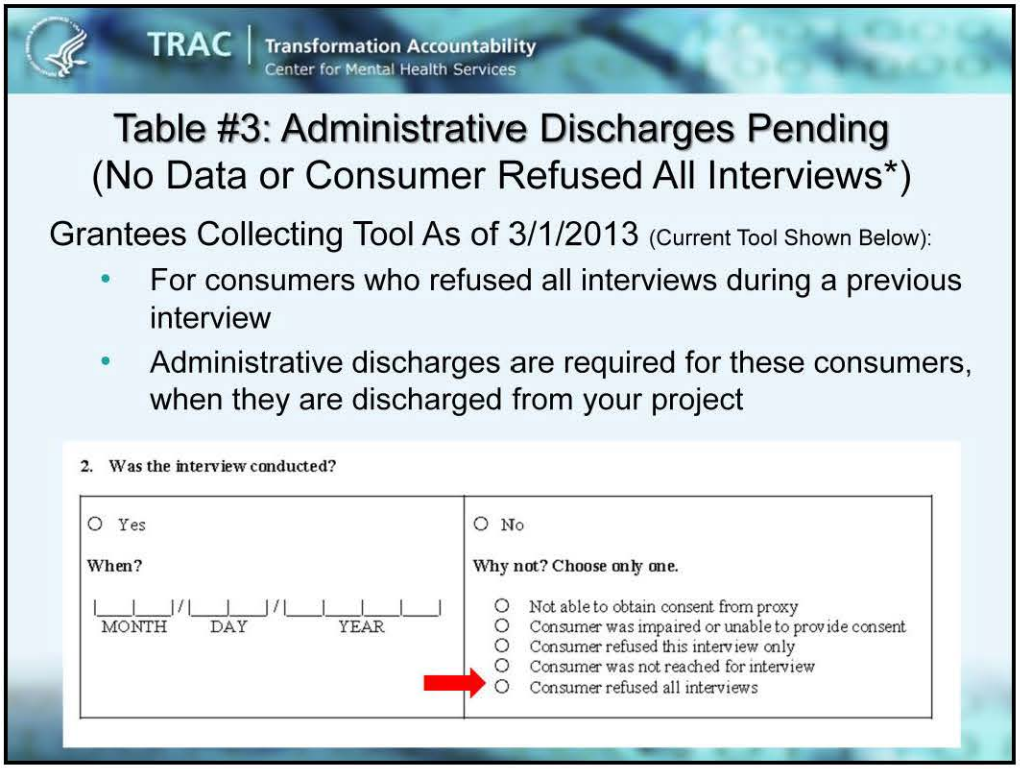
- This slide applies to Grantees collecting the version of the tool prior to 3/1/2013.
    - The table shows the consumers who refused an interview during a previous interview, AND for whom you indicated no data other than discharge status would be submitted for in the future.

Administrative discharges are required for these consumers. This table lists the consumers that are pending administrative discharges.



Pending administrative discharges are rare – which is why this report is used as a reminder. The only people who would show on this list are consumers for whom you indicated that administrative data only or no data will be submitted in question 2b of the NOMs.

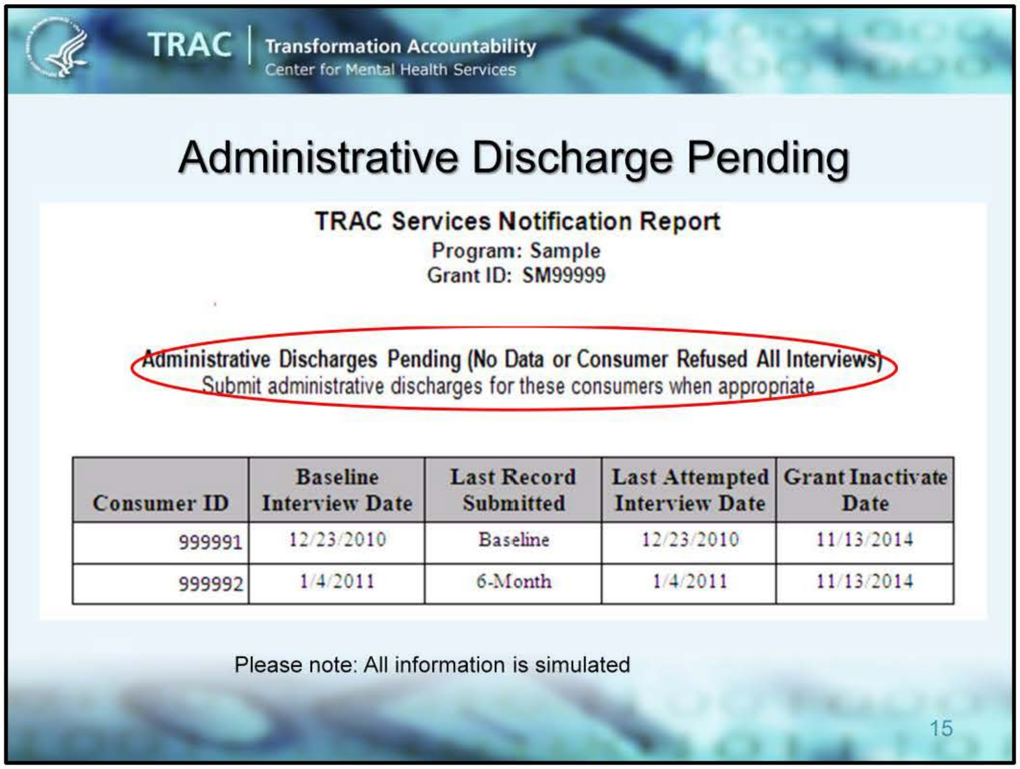
For all other consumers you should continue to enter Administrative Reassessments and Discharges as necessary.



This third table in the Notification Report also shows information for Grantees collecting the version of the tool implemented as of 3/1/2013.

- This slide applies to any Grantee currently collecting the tool.
    - For this version of the tool, the table shows the consumers who refused all interviews during a previous interview.

Though reassessment data is not required in this case, you are required to submit an administrative discharge for these consumers. This table lists the consumers that are pending administrative discharges.



This is a sample of the Administrative Discharge Pending table.

Like the other tables, the header shows the date and time that the report was updated. Notice that there are fewer consumers on this table. These should be relatively rare compared to the number of cases on the other two tables.

I’m going to describe each column in the table to you.

Consumer ID is a unique consumer identifier that is determined by the grantee. These consumers have a reassessment interview due.

Baseline Interview Date is the date on which the TRAC Services client-level baseline was conducted or attempted.

Last record submitted shows the last interview type and time point that was conducted for a given consumer.

Last attempted interview date applies to pending administrative discharges only. It is the date you last attempted to interview the consumer. This should also be the date that the consumer refused all future interviews.

The fourth table in the Notification Report lists consumers that haven't had a record entered into TRAC in 270 days (9 months).

These consumers should either be contacted for an interview as soon as possible or a record should be entered into TRAC, either an administrative reassessment or discharge.

A consumer will not appear on the report if a discharge record has been entered or if a reassessment record has been entered that indicates in Section I that the grantee has not had contact with the consumer for 90 days or more.

This is a sample of the Open Consumers table.

I'm going to describe each column in the table to you.

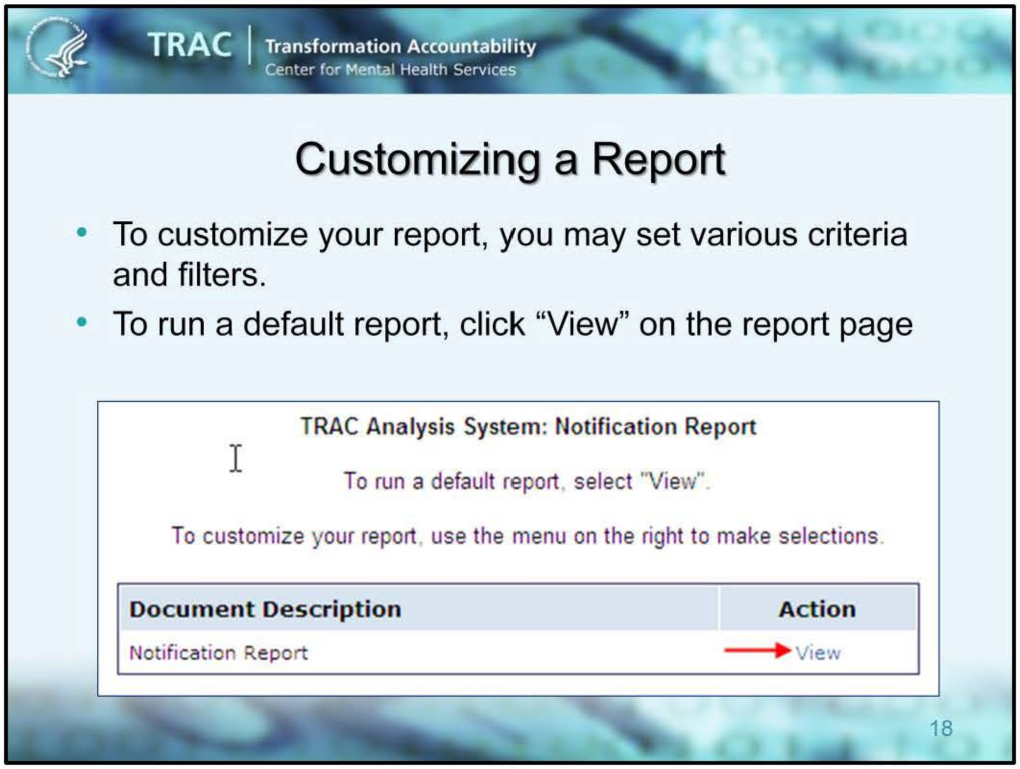
Consumer ID is the unique consumer identifier that is determined by the grantee. These consumers do not have a record in TRAC with a date within the past 270 days (9 months).

Baseline Interview Date is the date on which the TRAC Services client-level baseline was conducted or attempted.

Last record submitted shows the last record (which could be an interview or an administrative record) entered for each consumer.

Last record or interview date is the date you last interviewed or attempted to interview the consumer.

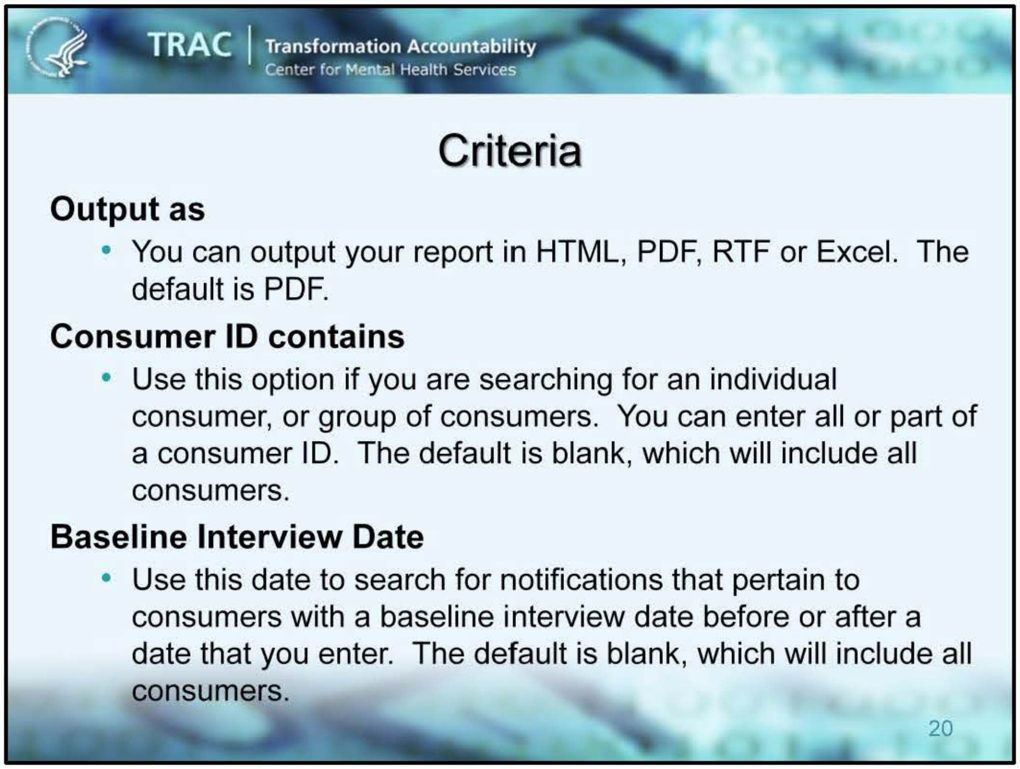
The consumers listed in this table need a record entered into TRAC as soon as possible. Due to the system lock dates, conducted interviews will not be able to be entered. An admin reassessment or discharge should be entered as appropriate.



You can customize your report by setting various criteria and filters. I’ll describe all the choices you can make on the next couple of pages.

First though, I want to point out that if you want to run a default report, you can just click “view” on the report page. This will create a report with all the default filters and criteria. Most of the time, this will probably be all you need.

These are all the criteria that you can use to customize your notification report. I'll go through them one at a time.



Output as

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

Consumer ID contains

Use this option to search for a specific consumer(s) by entering all or part of a Consumer ID.

Baseline Interview Date

Use this to search for notifications for consumers with a baseline interview date before or after a specific date.

Earliest Date of Eligibility for Reassessment (optional)

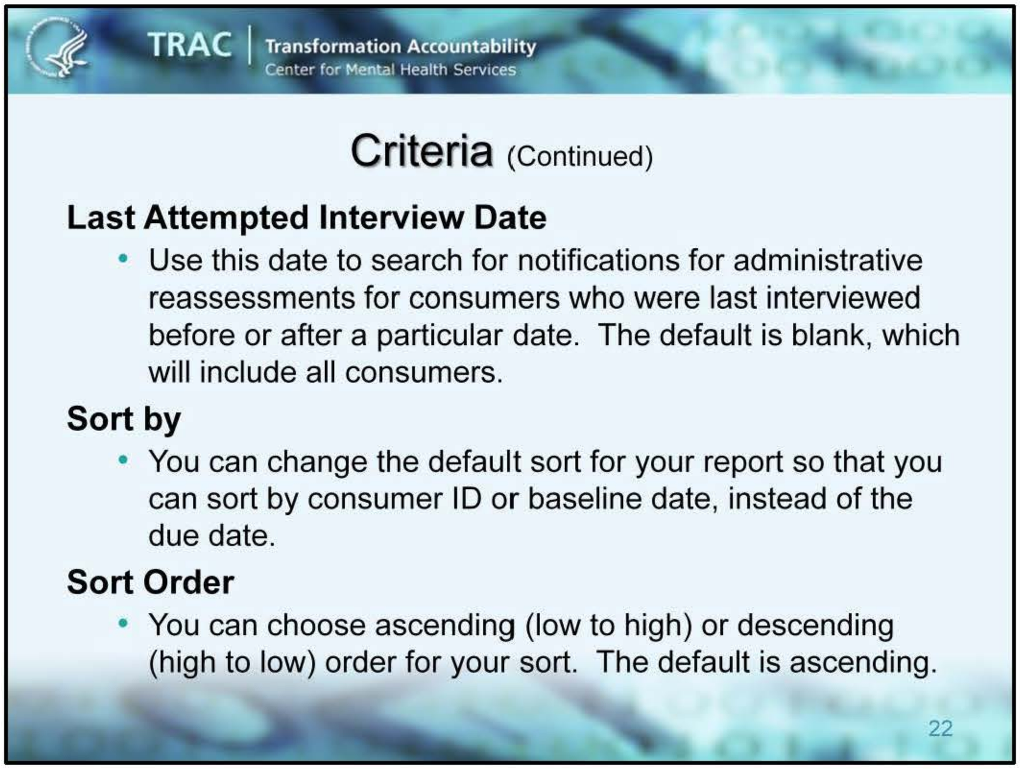
Use this date to search for notifications for reassessment windows that open before or after a date that you enter. The default is blank, which will include all consumers.

Due Date (optional)

Use this date to search for notifications for reassessments that are due before or after a date that you enter. The default is blank, which will include all consumers.

Latest Date of Eligibility for Reassessment (optional)

Use this date to search for notifications for reassessment windows that close before or after a date that you enter. The default is blank, which will include all consumers.



Last Attempted Interview Date

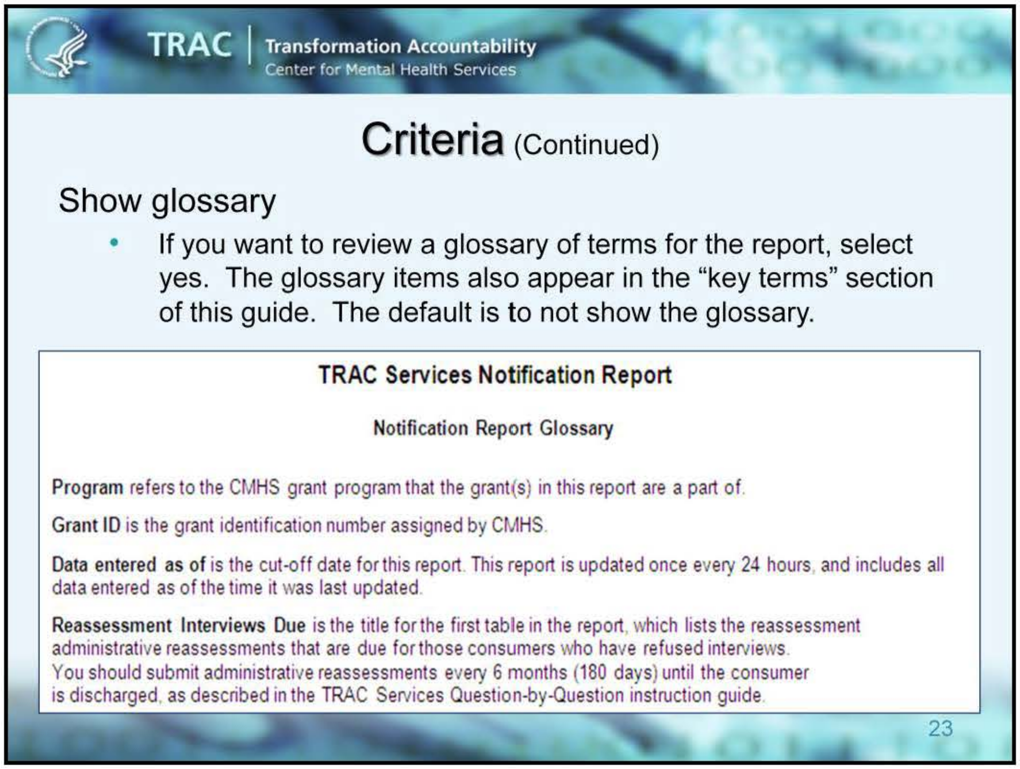
Use this date to search for notifications for administrative reassessments for consumers who were last interviewed before or after a particular date. The default is blank, which will include all consumers.

Sort by

You can change the default sort for your report so that you can sort by consumer ID or baseline date, instead of the due date.

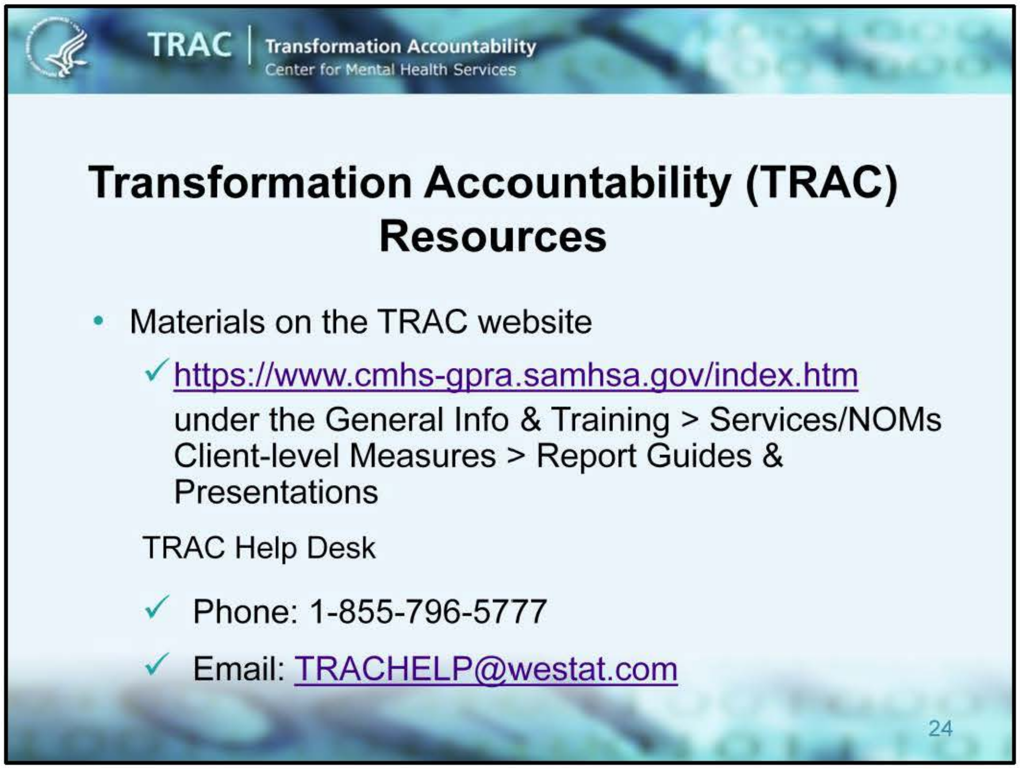
Sort Order

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



This slide demonstrates the information displayed in the glossary for this report.

All the key terms for this report appear in the glossary.



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.