



TRAC | Transformation Accountability
Center for Mental Health Services

Transformation Accountability (TRAC)
Center for Mental Health Services

NOMs Client-level Measures
Guide for Grantees and CMHS Staff

Number of Consumers Served Report
Training Presentation

Version 6
February 2014

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



Number of Consumers Served Report

Purpose

- To monitor grant and program performance in submitting baseline records and meeting enrollment goals

Includes

- Count of consumers served
- Annual goal of consumers to be served
- Percentage of the goal achieved
- Count of consumers served since the start of the grant
- Number of consumers to be served during the total grant period
- Percentage of the goal achieved since the start of the grant

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.

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Selecting the Report

STAGING

User: Maureen Kelly
Roles: Admin

Home > Reports Print

Reports

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.

[WesDax TRAC Reports System](#)

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Reports
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Logout

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- 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.



Selection Criteria

Output as HTML, PDF (default), RTF or Excel

Report By

Group your report by All Combined, Program, Cohort or Grant (default).

Grant Status

Filter by Active Grants only or all grants

Goal Approval Status

Select to view grants by “Approved Goals Only” or by “Approved and Unapproved Goals” (default is “Approved Goals Only”)

By Grant Year

Select “Current Grant Year” (default) or other grant years

Grant Information contains

Enter text/keywords to filter the report (default is blank)

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.



Selection Criteria

Sort by

Sort report by any of the column headings from the report

Sort Order

Sort report in ascending (low to high) or descending (high to low) order (default is ascending)

Show Glossary

Select yes to view the glossary in the report (default is to not show the glossary)

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.



Selection Criteria

Population

Select the population groups you want to include in the report.

Region

Select to view data based on specific regions

State

Select to view data based on specific states

Program or Grant

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

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.



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Number of Consumers Served Report View

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.

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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.



Number of Consumers Served Report

- Report columns
 - ✓ Grant or Program Information
 - ✓ Consumers Served*
 - ✓ Goal*
 - ✓ Number Served Rate

* **Please note:** These values are provided for the selected grant year, the year before and cumulatively.

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 Columns

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%
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Since the report is by grant, the first column identifies 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)**.



Number of Consumers Served Report Columns

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%
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- **CONSUMERS SERVED** - represents a **unique count of all consumers**. 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.



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Number of Consumers Served Report Columns

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
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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 Columns

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%
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Note
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- **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).



Number of Consumers Served Report by Federal Fiscal Year

- This training has focused on the NCSR by Grant Year
- There is a NCSR by Federal Fiscal Year
 - ✓ Accessible only to GPOs and other CMHS staff
- The NCSR by FFY converts all goals information from grant years to Federal Fiscal Years
- The NCSR by Federal Fiscal Year Guide is located on the TRAC website at <https://www.cmhs-gpra.samhsa.gov> > General Info & Training > Services/NOMs Client-level Measures > Report Guide Presentations

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The version of the Number of Consumers Served Report we just reviewed displays goal data by Grant Year. This is the only version of the report available to grantee staff. However, there is a version of the report that uses Federal Fiscal Year, 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”.



Transformation Accountability (TRAC) Resources

- Materials on the TRAC website
 - ✓ <https://www.cmhs-gpra.samhsa.gov/index.htm>
under the General Info & Training tab
- TRAC Help Desk
 - ✓ Phone: 1-888-219-0238
 - ✓ Email: TRACHELP@westat.com

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Please visit the TRAC website for more information regarding the Services Activities module.

The TRAC website contains written training guides, power point presentations, and self-guided e-trainings. They are located under the General Info & Training > Services/NOMs Client-level Measures > Report Guides & Presentations.

If you have any other questions please contact the TRAC Help Desk.
Help Desk hours of operation are from 8:30am to 7:00pm ET by telephone or email.

This concludes the training on the TRAC Client-level Measures Module Data Entry and Basic Reports training.