



# Full Service Partnership (FSP) Data Collection & Reporting (DCR) User Manual

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*Information and Instruction for Version 3.5.5*

*Abridged by San Francisco Community Behavioral Health Services*

*to include only information useful for FSP staff*

The following document was funded by the Mental Health Services Oversight and Accountability Commission.

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### Definitions and Abbreviations

| <b><u>Term</u></b> | <b><u>Meaning</u></b>                        |
|--------------------|--|
| 3M                 | Quarterly Assessment                         |
| ADL                | Activities of Daily Living                   |
| Adult              | Adults of Ages 26 - 59                       |
| Child/Youth        | Children of Ages 0 - 15                      |
| CSI                | Client Services Information                  |
| CVI                | Complete Variable Index                      |
| DCR                | Data Collection and Reporting                |
| DMH                | California Department of Mental Health       |
| FSP                | Full Service Partnership                     |
| FY                 | Fiscal Year                                  |
| 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                  |
| Partner            | A Client of the Full Service Partnership     |
| PC                 | Penal Code                                   |
| POQI               | Performance Outcomes and Quality Improvement |
| ro                 | Read Only (Authority)                        |
| RO                 | Read Only (Role)                             |
| rw                 | Read/Write (Authority)                       |
| RW                 | Read/Write (Role)                            |
| SED                | Seriously Emotionally Disturbed              |
| 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                        |
| YSS-F              | Youth Services Survey for Families           |

### Chapter 1: Background Information

#### Overview of FSP Program

County Mental Health Plans (Counties) receive state-based funding for mental health services as a result of California Proposition 63 (now known as the Mental Health Services Act or MHSA), passed in November of 2004. MHSA provides increased funding to support California's county mental health programs. The MHSA imposes a one percent income tax on personal income in excess of \$1 million to address a broad continuum of prevention, early intervention and service needs and the necessary infrastructure, technology and training elements that will effectively support this system, with the purpose of promoting recovery for individuals with serious mental illness. Counties develop customized plans for mental health partner service in accordance with State requirements, including that it must provide for significant local stakeholder input and involvement.

MHSA also funds a special program called the Full Service Partnership (FSP). FSP programs provide a full spectrum of mental health services to children/youth (ages 0 – 15) and transition age youth (TAY) (ages 16 – 25) who are seriously emotionally disturbed and adults (ages 26 – 59) and older adults (ages 60+) who have a serious mental disorder; all of which are referred to as partners in the program. Additional criteria, described in Welfare and Institution Code (WIC) §5600.3, must also be met. A basic principle of the program is its flexible funding, which assures that counties may provide whatever services are necessary to help the individual access needed resources. Services offered by local programs include assessing the individual's needs; providing shelter/housing; establishing identification and legal assistance needs; and providing food, clothing, showers, medical, psychiatric, dental care, alcohol/drug treatment, and social rehabilitation.

#### History of the FSP DCR

The MHSA Section 5892(d) allowed investing some portion of the MHSA funds on administrative (technological) needs to ensure adequate research and evaluation regarding the effectiveness of services being provided and the achievement of the outcome measures. In 2005, the Department of Mental Health (DMH) was permitted funding to develop the FSP Data Collection and Reporting (DCR) system. By January 1, 2006 the interim FSP DCR was available for county use, and 10 counties used the interim FSP DCR. In June 2007, an enhanced version of the FSP DCR was made available, which allowed counties to key-enter data or upload data via XML batch upload. DMH worked with counties to develop data validation rules, fixes and enhancements to the FSP DCR as reflected by the updated versions of the FSP DCR released in July 2007, October 2007, February 2008, March 2008, May 2008, July 2008, September 2008,

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October 2008, March 2009, April 2009, July 2009, October 2009, January 2010, March 2010, June 2010 and October 2010. This user manual for the FSP DCR currently reflects capabilities in the FSP DCR for Version 3.5.5 released October 2010.

## Data Collection and Reporting Forms for FSP

Counties report partner information and outcomes of the FSP program directly to the FSP DCR system. Current regulations require counties to collect partner outcome FSP data (CCR Title 9 § 3620.10) and submit it to DMH within 90 days (CCR Title 9 § 3530.30). Counties submit data for three different types of partner assessments into the FSP DCR through an online interface or by XML file submission. Through the FSP DCR system, the Partnership Assessment Form (PAF) gathers baseline information about the partner, while Key Event Tracking (KET) and Quarterly Assessment (3M) gather follow up information. The questions on the each of the PAF, KET and 3M forms may differ slightly depending on the four age groups (Child/Youth, TAY, Adult and Older Adult). Therefore, there are individual forms for each partner assessment type and age group, resulting in 12 different forms for data collection.

➤ **List of All Data Collection Forms:**

1. PAF for Child/Youth
2. PAF for TAY
3. PAF for Adult
4. PAF for Older Adult
5. KET for Child/Youth
6. KET for TAY
7. KET for Adult
8. KET for Older Adult
9. 3M for Child/Youth
10. 3M for TAY
11. 3M for Adult
12. 3M for Older Adult

- ❖ Refer to the [Full Service Partnership \(FSP\) Data Collection and Reporting \(DCR\) Data Dictionary](#) document for an example of each form.

### Chapter 2: Introduction to the FSP DCR

The following chapter provides an introduction to the types of data, the relationship between the data and the requirements of the data collected by the FSP DCR.

#### Functions of the FSP DCR

##### Programs and Coordinators

The FSP DCR is designed so that FSP partners can be added, tracked and updated in the FSP DCR system. The FSP DCR system associates each partner with one of the county's FSP programs. There is also an option to associate a partner with standard programs of former AB2034, Governor's Homeless Initiative (GHI), and/or the MHSA Housing Program. Partners are assigned to one partnership service coordinator (PSC). The FSP DCR also provides the option of associating a partner with one provider. At any time, a partner can be switched between county programs, providers and PSCs or enrolled/discontinued from the standard programs.

##### Partner Demographics

The FSP DCR collects information about the partner's name, and it requires a date of birth to calculate the age group of the partner. The age group of the partner helps the FSP DCR to identify the correct form fields which vary by age groups. However, minimal other demographic information about the partner is reported to the FSP DCR directly, and when a Client Services Information (CSI) number is provided in the FSP DCR, an automated link to the DMH CSI database populates the gender, race, ethnicity and CSI date of birth fields of the FSP DCR.

##### Partner Outcomes

The FSP DCR collects information about a partner at intake through a PAF, which includes information about the partner's current status, the status in the 12 months before enrollment, and the status prior to the last 12 months. Then some information is updated only quarterly via the 3M form, while other changes in status are collected on an ongoing basis via the KET form as certain key events occur. Information is collected in the following domains: Residential Housing, Employment, Education, Financial Support, Health Status, Emergency Intervention, Substance Abuse, Legal Issues, and for older adults only, Activities of Daily Living (ADL) and Instrumental Activities of Daily Living (IADL).

##### Data Collection Intervals

Questions for each domain are collected at various intervals depending on the nature of the information being collected. Baseline information in relation to all questions is collected at partner intake via the PAF. Questions in which it is important to know the date the event

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occurred are collected via the KET forms. All other questions are collected only at intake via the PAF or on intake via the PAF and then quarterly via the 3M. Other than partnership information variables, no information for a particular question is visible on both the KET and 3M.

### **Customizable Fields**

The FSP DCR also allows data to be collected in six customizable fields called county-use fields. There are three county-use text fields which allow information about the partner to be collected and tracked via the KETs. There are also three county-use text fields which allow information about the partner to be collected and tracked via the 3Ms.

### **Data Quality**

The FSP DCR has many data validation rules which are designed to ensure only correct data is stored in the database. Error messages are generated and data is rejected when a user tries to enter invalid information. The FSP DCR identifies when there is missing data on the PAF through the PAF status notification. The FSP DCR also provides a notification list when there are missing quarterly assessments. In addition, the FSP DCR online interface provides a notification list when the data indicates that a partner is at a temporary residential for more than 30 days, suggesting that this data should be validated.

### **Data Security Features**

All users of the FSP DCR are assigned a role and a group for data security. The groups determine which data the user can access through the FSP DCR interface, and the roles determine the level of authority a user has to make changes to that data.

### **Data Extraction**

For authorized users, the FSP DCR provides a method of downloading all of the data for their assigned group as CSV or XML files. A user with a county-wide group can download all of the data for the county. The data can then be used with other software packages for analysis.

## **System Interface Overview**

Data is reported to the FSP DCR through the ITWS website. The ITWS website allows Department of Mental Health (DMH) and business partners (counties, vendors, state departments, etc.) to securely report and access various DMH systems over the Internet.

- ❖ Refer to [Chapter 3 “The Online System Interface”](#) for details about the ITWS system interface.

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### FSP DCR Data Hierarchy

Data stored by the FSP DCR can be categorized into six categories.

➤ **Categories of Data:**

1. General Partnership Information & Administrative Data Fields
  2. Internally Generated Fields
  3. CSI-linked Fields
  4. Partner's History Fields (collected only on PAF)
  5. Domain Type A Fields (collected on PAF & KET)
  6. Domain Type B Fields (collected on PAF & 3M)
- ❖ Refer to the [Full Service Partnership \(FSP\) Data Collection and Reporting \(DCR\) Data Dictionary](#) document for a complete list of database questions, variables, and intervals of collection.

➤ **General Partnership Information & Administrative Data Fields:**

- County
- Partner's FSP Program ID
- Partner's Partnership Service Coordinator (PSC) ID
- Partner's First Name and Last Name
- Partnership Date
- Partner's Date of Birth
- CSI County Client Number (CCN)
- County Partner ID
- Provider Number / NPI
- Who Referred the Partner
- Other Programs (FORMER AB2034, GHI, MHSA)
- Discontinue Reason (only when a partner is discontinued)

Diagram 2-1 illustrates the FSP DCR data hierarchy for relevant fields depicted. When a partnership is initiated in the FSP DCR, information is required on a PAF specific to the partner's age group. The Partner's FSP Program ID and PSC ID fields are populated from a drop-down list of values, and the values for these fields must be created in the database before the partnership can be established in the database. There are a total of six fields which are required to start a partnership in the database, and all other fields are optional and can be added to or updated on the PAF after the partnership is established and while the PAF is pending. When a PAF is incomplete, it has a PAF Status of "Pending", and fields on the PAF can be changed. After the PAF has been completed, which must include a valid CSI CCN, the PAF Status can be set to

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“Complete” or “Certified Complete”. Changes to the all other information about the current status of the partner are then tracked through the KET or 3M forms.

Table 2-1 summarizes the details of the FSP DCR field characteristics described subsequently.

- **Before a partner can be added to the FSP DCR database, the following must exist in the database:**
  - County
  - Partner’s FSP Program ID
  - Partner’s PSC ID
  - ❖ Refer to [Chapter 4 “Enrolling and Certifying a County”](#) for details about creating FSP Programs IDs.
  - ❖ Refer to [Chapter 5 “Managing DCR Users”](#) for details about creating the PSC IDs.
  
- **When a partnership is established, the following fields are required fields:**
  - County (automatically populated)
  - Partner’s First Name and Last Name
  - Partnership Date
  - Partner’s Date of Birth
  - Partner’s FSP Program ID
  - Partner’s PSC ID
  
- **When a partnership is established, the following administrative fields are optional fields:**
  - CSI CCN
  - County Partner ID
  - Provider Number / NPI
  - Who Referred the Partner
  - Other Programs (FORMER AB2034, GHI, MHSA)
  - Partner’s History
  - PAF Domain Type A and Type B

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- **A partner can be associated with only one of the following at a time, and changes can only be made to these values on the original PAF. All updates to these fields on the PAF will automatically show on all new or existing KETs and 3Ms:**

- Partner's First Name and Last Name
- Partner's Date of Birth
- CSI County Client Number
- County Partner ID
- Who Referred the Partner
- Partner's History

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**Note:** When correcting a partner's birth date on the PAF, the age group for the partner at the time the partnership was established could change. If a correction to the birth date results in a change of age group at the time of the partnership, the PAF form will not update to the appropriate PAF type to accommodate the change. Therefore, in this case, the partner should be deleted and recreated in the FSP DCR.

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- ❖ Refer to the [Chapter 11 "Data Correction"](#) for further information about deleting and recreating partners and correcting data.

- **A partner can be associated with only one of the following at a time, and dates of changes to these fields can be tracked through the KETs or 3Ms:**

- Partner's FSP Program ID
- Partner's PSC ID
- Provider Number / NPI
- Other Programs (FORMER AB2034, GHI, MHSA)
- Domain Type A and Type B

- **In addition, the following fields are automatically generated in the FSP DCR when the partnership is established:**

- Global ID = FSP DCR Partner Identifier
- Assessment ID = FSP DCR ID for assessment
- PAF Status = Identifies if PAF is fully completed
- Partnership Status = Active
- Created Date = Date the record was entered into the FSP DCR

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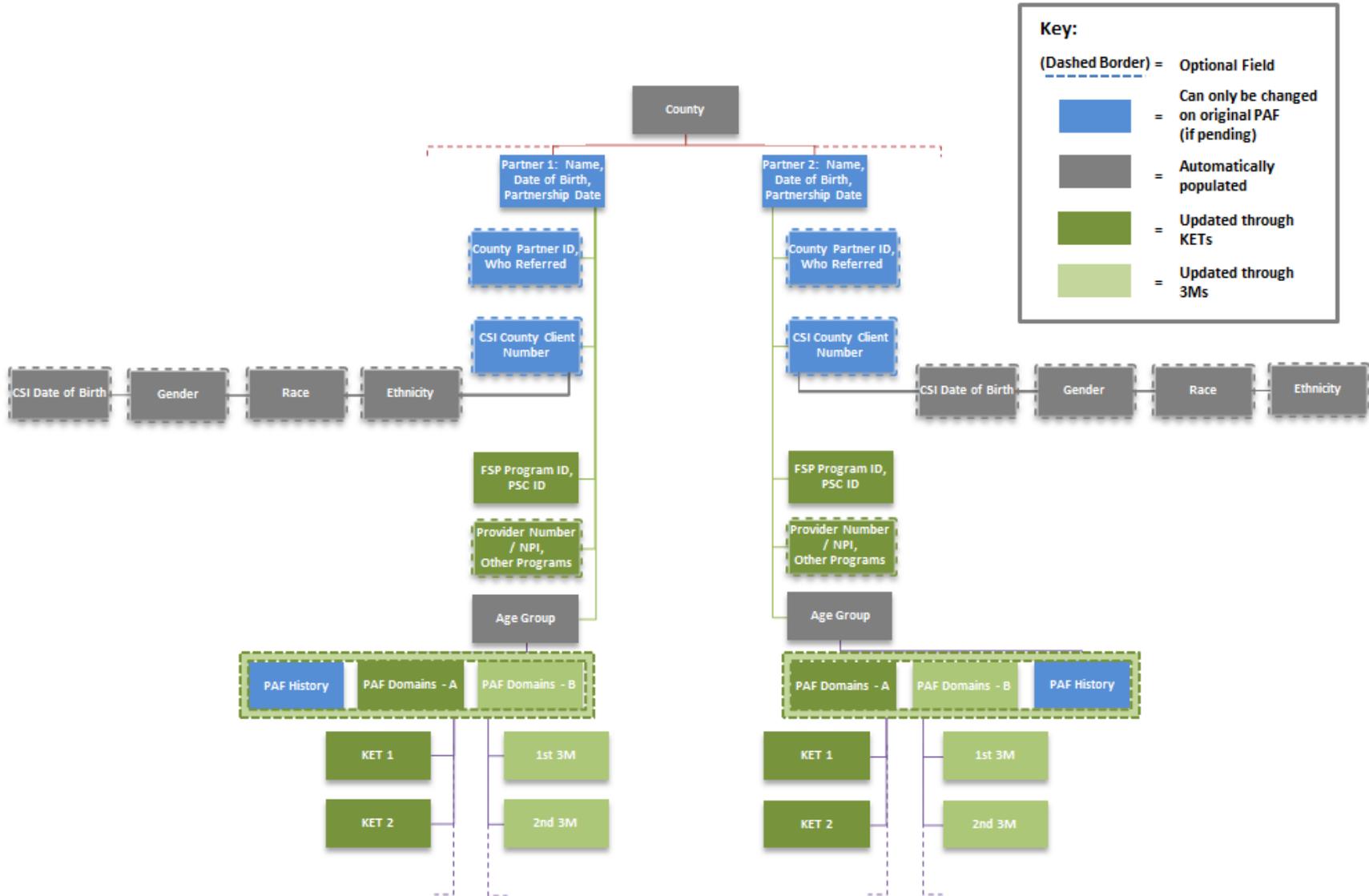
- Age Group = Automatically generated from Date of Birth (Child/Youth, TAY, Adult, Older Adult)
- Assessment Type = PAF, KET, 3M
- Assessment Source = DCR Online System, XML Batch Update, Legacy/DCR Interim System
- CSI-linked Fields (when valid CSI CCN is provided)
  - Gender
  - CSI Date of Birth
  - Race
  - Ethnicity

**Table 2-1: FSP DCR Field Characteristics**

| Field(s)   | Value Must Exist in Database | Required Field | Changes              |
|--|------------------------------|----------------|----------------------|
| County   | Yes                          | Yes            | Can't be changed     |
| Partner's First and Last Name                        | No                           | Yes            | Only on original PAF |
| Partner's Date of Birth                              | No                           | Yes            | Only on original PAF |
| Partnership Date                                     | No                           | Yes            | Can't be changed     |
| County Partner ID                                    | No                           | No             | Only on original PAF |
| Who Referred the Partner                             | No                           | No             | Only on original PAF |
| Partner's History Fields                             | No                           | No             | Only on original PAF |
| CSI County Client Number (CCN) and CSI-linked fields | Yes - Partner must be in CSI | No             | Only on original PAF |
| Partnership Program ID                               | Yes                          | Yes            | Tracked on KETs      |
| Partnership Service Coordinator ID                   | Yes                          | Yes            | Tracked on KETs      |
| Provider Number / NPI                                | No                           | No             | Tracked on KETs      |
| Other Programs (FORMER AB2034, GHI, MHSA)            | No                           | No             | Tracked on KETs      |
| Internally Generated Fields (e.g., Age Group)        | n/a                          | n/a            | Internally Generated |
| Domain Type A  | No                           | No             | Tracked on KETs      |
| Domain Type B  | No                           | No             | Tracked on 3Ms       |

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**Diagram 2-1: Data Hierarchy**



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### Age Groups

When a partner is first registered in the FSP DCR system, the partner is automatically assigned to one of the four age groupings specified in the MHS A Three-Year Program and Expenditure Plan Requirements document. Information is collected on the partner through FSP DCR forms specific to each age group. If a partner “ages up” from one age group to another (e.g., has a birthday and turns from 15 to 16, aging out of Child / Youth group to the TAY group), then all KETs and 3Ms collected after the partner ages up will reflect the new age group for the partner.

➤ **Available Age Groups:**

- Child / Youth (Ages 0-15)
- Transition Age Youth (Ages 16-25)
- Adults (Ages 26-59)
- Older Adults (60+)

### Outcome Domains

The FSP DCR is designed to collect information on the partner’s history, the current status and the status during the FSP program. The information collected is broken into ten outcome domains described in Table 2-2. Domain Type A are collected on the PAF and KET. Domain Type B are collected on the PAF and 3M. The partner’s historical information for a domain is collected only on the PAF.

**Table 2-2: Available Outcome Domains**

| Domain  | Type | Is Past History Collected on PAF? | Collected On |
|---|------|-----------------------------------|--------------|
| Residential   | A    | Yes                               | PAF & KET    |
| Education   |      |                                   |              |
| ○ School Enrollment and Graduation/Completion Dates   | A    | Yes                               | PAF & KET    |
| ○ Grades, Attendance and Special Education Assistance | B    | Yes                               | PAF & 3M     |
| Employment  | A    | Yes                               | PAF & KET    |
| Financial Support                                     | B    | Yes                               | PAF & 3M     |
| Legal Issues / Designations                           |      |                                   |              |
| ○ Partner’s Legal Issues                              | A    | Yes                               | PAF & KET    |
| ○ Legal Designation of Partner’s Dependents           | B    | No                                | PAF & 3M     |
| Emergency Interventions                               | A    | Yes                               | PAF & KET    |
| Health Status   | B    | Yes                               | PAF & 3M     |
| Substance Abuse                                       | B    | Yes                               | PAF & 3M     |
| ADL-older adult only                                  | B    | No                                | PAF & 3M     |
| IADL-older adult only                                 | B    | No                                | PAF & 3M     |

- ❖ 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.

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### Partnership Assessment Form (PAF)

The PAF is completed at the time in which a partnership is established. It includes a history for some domains and baseline data for all domains. The questions on the PAF vary by the age group assigned to the partner.

### Key Event Tracking (KET)

The KET is completed every time there is a change in one of the KET domains. A KET contains information on the change that occurred for a KET domain and the dates the changes occurred.

➤ **KET Domains:**

- Administrative Information – All changes
- Residential – All changes
- Education – Dates of school enrollment or graduation dates
- Employment – All changes
- Legal Issues / Designations – Dates of partner's legal issues
- Emergency Interventions – All changes

### Quarterly Assessment (3M)

The Quarterly Assessment (3M) is completed every 3 months to assess changes for the 3M domains. A 3M assessment must be completed every 3 months but can be collected for the partner status up to 15 days before or 30 days after it is due. Data collected in this timeframe can be submitted at any time to the FSP DCR system by stating the collection date within the required window.

➤ **3M Domains:**

- Education – Current status of grades, attendance and special education assistance
- Financial Support – All current status
- Legal Issues / Designations – Current status of legal designations of partner's dependents
- Health Status – All current status
- Substance Abuse – All current status
- ADL / IADL – All current status

### Data Collection Intervals

As discussed, questions for each domain are collected at various intervals depending on the nature of the information being collected. Baseline information in relation to all questions is collected when the partnership is established via the PAF history questions. Information in which it is important to know the date of the event occurred are collected initially on the PAF

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and then updated via the KET forms. Other information is collected via the PAF and then the status is updated quarterly via the 3M.

Diagram 2-2 illustrates an example data set by the collection intervals, which is described by the example below.



### **EXAMPLE:**

A partnership is established on 7/1/2009 with a TAY. The baseline information for the partner indicates that the partner is homeless, not in school and not employed. The partner currently has a co-occurring substance abuse problem for which he is not receiving treatment services, and the partner is currently receiving no financial support. On 8/25/2009, the partner has his first arrest during the program, and the arrest date is recorded in the FSP DCR via a KET. On 9/5/2009, the partner moves into an emergency shelter and the residential change and date are recorded in the FSP DCR via a KET.

On 10/1/2009, the end of the partner's first quarter in the FSP program, the partner receives his first 3M assessment. The partner's current status indicates that he still has a co-occurring substance abuse problem for which he is not receiving treatment services, and the partner is still receiving no financial support. On 10/6/2009, the partner has his second arrest during the program and, on the same day, his first mental health emergency intervention. Both events are recorded via the same KET. On 11/2/2009, the partner has his third arrest during the FSP program, and the arrest date is recorded via a KET. On 12/15/2009, the partner has his second mental health emergency intervention, and the date and type of intervention are recorded via a KET.

On 1/1/2010, the end of the partner's second quarter in the FSP program, the partner receives his second 3M assessment. The partner's current status indicates that he still has a co-occurring substance abuse problem for which he is now receiving treatment services, and the partner is still receiving no financial support. On 1/23/2010, the partner moves into an apartment alone, and the residential change and date are recorded via a KET.

On 4/1/2010, the end of the partner's third quarter in the FSP program, the partner receives his third 3M assessment. The partner's current status indicates that he still has a co-occurring substance abuse problem for which he is still receiving treatment services, and the partner is now receiving food stamp and housing support. On the same day, 4/1/2010, the partner begins a technical school program, and that information is recorded via a KET. On 4/9/2010, the partner has his third mental health emergency

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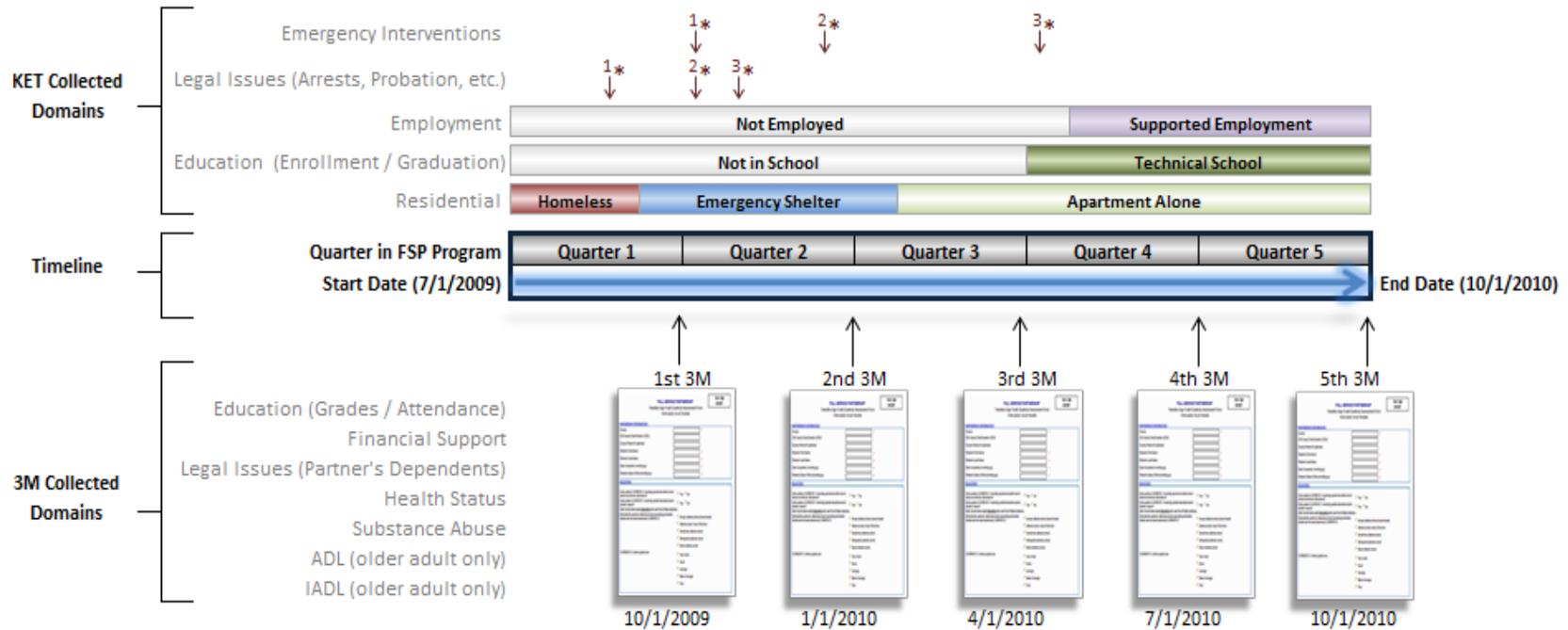
intervention, and the date and type of intervention is recorded via a KET. On 4/25/2010, the partner begins part-time supported employment, and the average weekly hours and wage are recorded via a KET.

On 7/1/2010, the end of the partner's fourth quarter in the FSP program, the partner receives his fourth 3M assessment. The partner's current status indicates that he no longer has a co-occurring substance abuse problem, but he is still receiving treatment services, and the partner is still receiving food stamp and housing support. No other events occur in the quarter and no KETs are created for the partner.

On 10/1/2010, the end of the partner's fifth quarter in the FSP program, the partner receives his fifth 3M assessment. The partner's current status indicates that he no longer has a co-occurring substance abuse problem, and he is no longer receiving treatment services. The partner is still receiving food stamp and housing support. The partner has met all of his goals, and is discontinued from the FSP Program via a KET with a discontinuation reason and date.

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**Diagram 2-2: Data Collection Example Timeline**



\* An asterisk refers to the relative point in time when the event occurred.  
 1,2,3 The number next to the asterisk refers to the relative order of similar events occurring over time.

## Chapter 2: Introduction to the FSP DCR

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### Data Reporting and Validation Rules

The data reporting rules appear throughout this FSP DCR Manual. However, Appendix A summarizes the FSP DCR reporting rules in a comprehensive list for reference.

- ❖ Refer to [Appendix A: “Data Reporting and Validation Rules”](#) for further information.
- ❖ Refer to Figure 7-2.4 in [Chapter 7 “Establishing Partners”](#) for information on accessing a validation report for each partner.

### Chapter 3: The Online System Interface

The California Department of Mental Health (DMH) hosts the Information Technology Web Services (ITWS) portal which allows partners and providers to access a number of information systems including the FSP DCR Application.

In order to access the online system, workstations must meet published system requirements as noted in the following sections. Additionally, there are a number of web browser configurations that must be made including adding the ITWS website as a trusted site, allowing Pop-up windows, and enabling cookies.

The ITWS system is accessible through the public Internet and there are a number of methods to access this site. Within the DMH DCR Application, functionality is accessible through the FSP DCR menu system.

#### ITWS System Requirements

In order to access the Information Technology Web Services (ITWS) website, your computer must meet or exceed the following requirements.

➤ **System Requirements:**

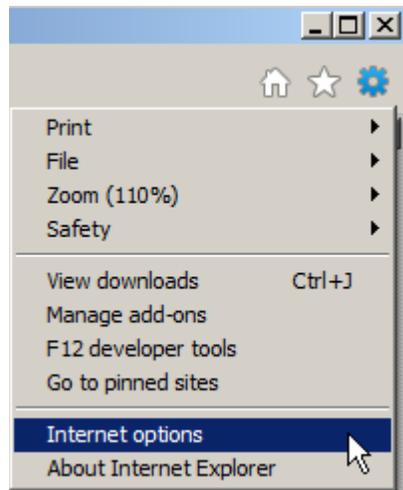
1. Microsoft Windows Operating System using Internet Explorer version 6 or later
2. Minimum 1024 x 768 recommended resolution
3. The ITWS system should be added as a Trusted Site
4. Pop-ups must be allowed for the ITWS system
5. Cookies must be enabled for the ITWS website in Internet Explorer

### Adding the ITWS Website as a Trusted Site

 To add the ITWS website as a Trusted Site:

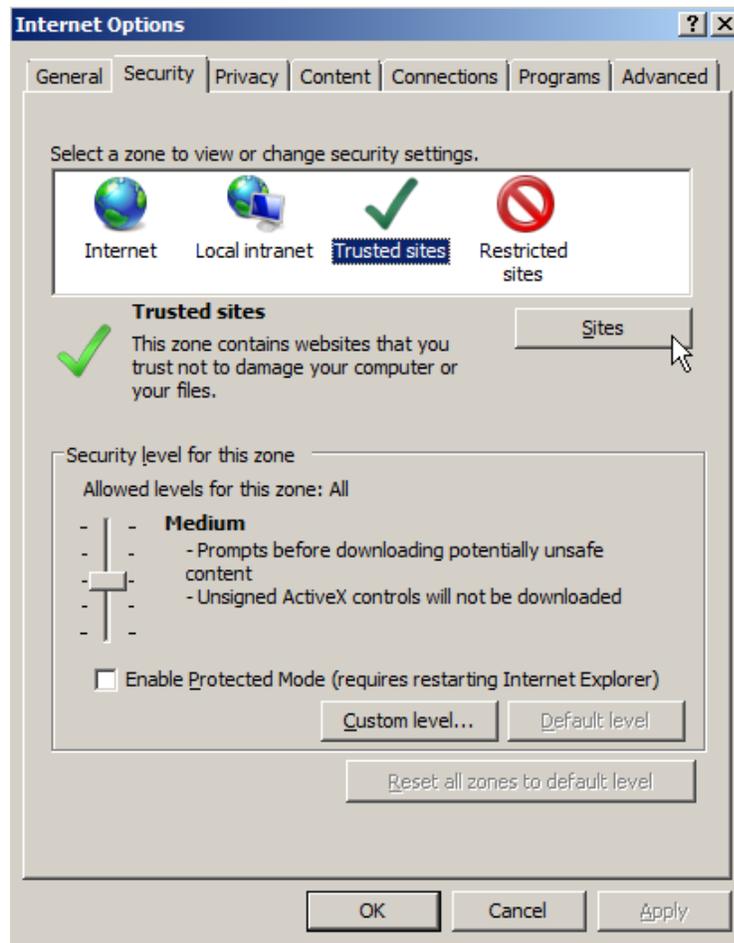
1. As seen in figure 3-1.1, click on the **Tools** menu or click on the Tools  icon, and click **Internet options**.

**Figure 3-1.1**



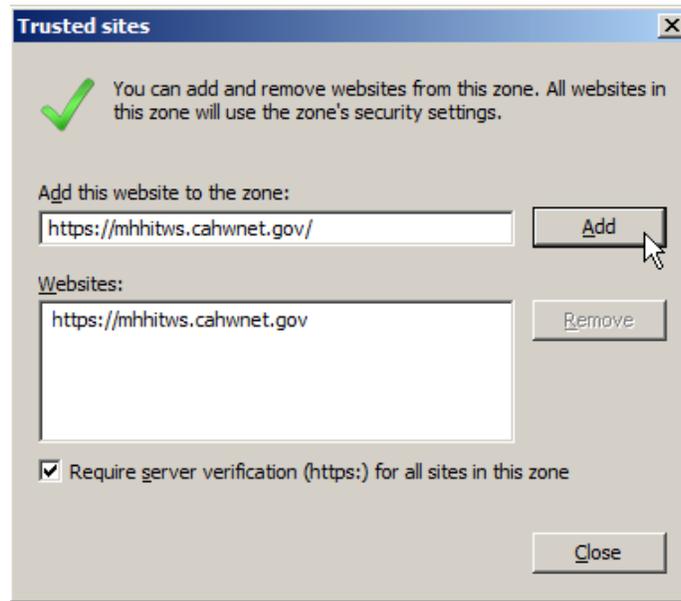
2. As seen in figure 3-1.2, click on the **Security** tab, select **Trusted sites** from the available security zones, and click on the **Sites** button.

**Figure 3-1.2**



3. As seen in **Figure 3-1.3**, enter the ITWS website, <https://mhitws.cahwnet.gov/>, into the **Add this website to the zone** textbox and click **Add**. This website should now appear under **Websites**.

**Figure 3-1.3**



### Configuring Pop-up Blocker

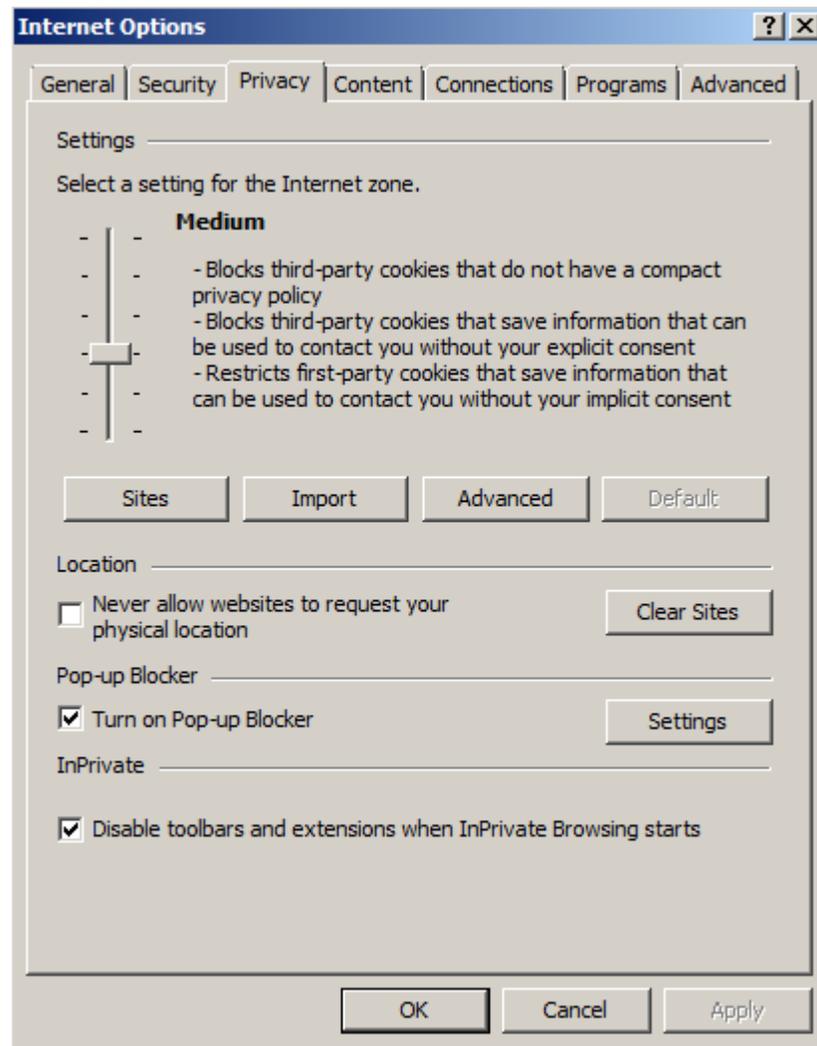
In order for the ITWS system to operate correctly, Pop-up Blocker must be disabled for the ITWS website.



**To modify Pop-up Blocker settings within Internet Explorer:**

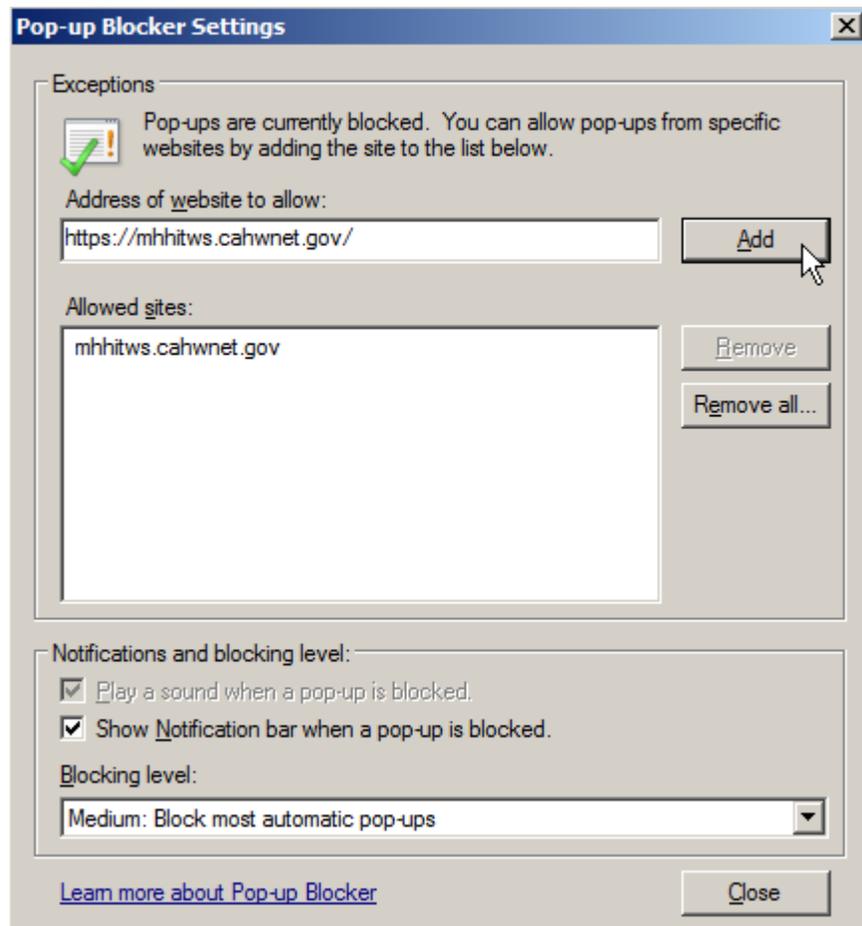
1. Click on the **Tools** menu or click on the Tools icon, and click **Internet options**.
2. As seen in Figure 3-2.1, on the **Privacy** tab, click on **Settings** under **Pop-up Blocker**.

Figure 3-2.1



3. As seen in Figure 3-2.2, on the **Pop-up Blocker Settings** page, enter the ITWS website, <https://mhhitws.cahwnet.gov/>, into the **Address of website to allow** field, and click **Add**. The website should then appear in the **Allowed Sites** listing.

Figure 3-2.2



### Enabling Cookies in Internet Explorer

The ITWS website uses cookies. These must be enabled in order for the site to operate properly. If cookies are not enabled, you will not be able to access the system and may receive one of the following messages after entering your username and password.

- **Error Messages When Cookies Are Disabled:**
  - Access to ITWS is denied
  - Cookies must be enabled
  - Please login before trying to enter ITWS



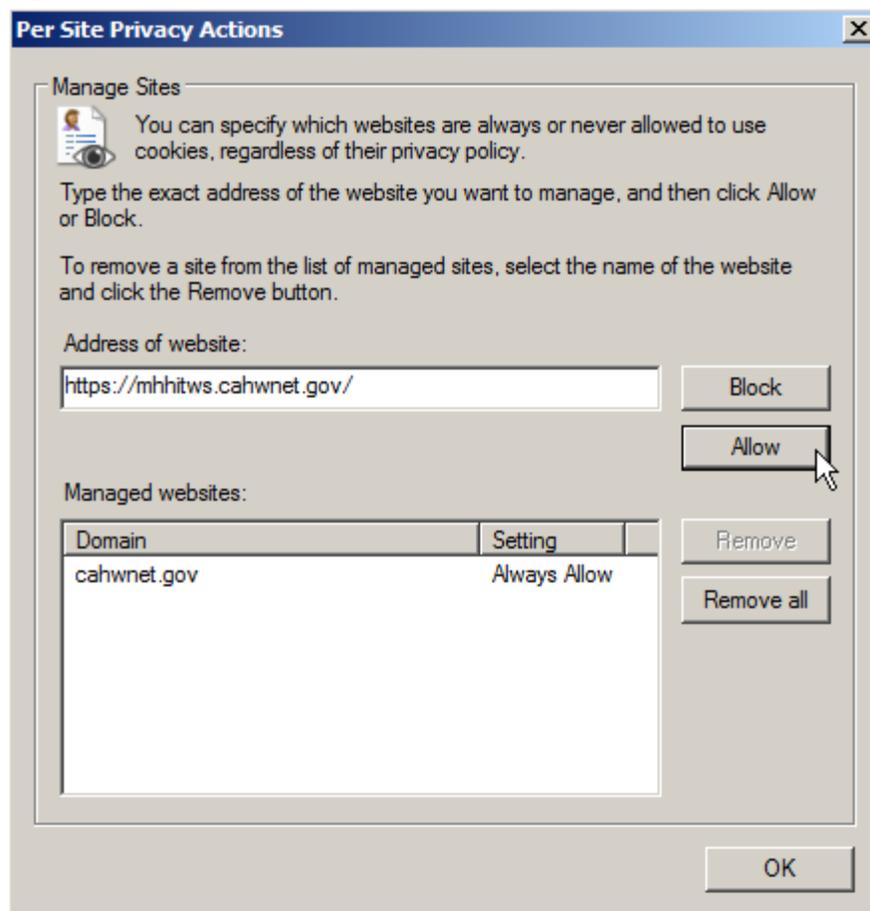
**To modify cookie settings within Internet Explorer:**

1. Click on the **Tools** icon and **Internet options** and go to the **Privacy** tab. By default, the slider bar will be set to **Medium** and cookies for the ITWS system will be allowed.

## Chapter 3: The Online System Interface

2. For higher security settings for cookies, it may be necessary to configure to allow cookies for the ITWS system. To do this, click on **Sites** button.
3. As seen in Figure 3-3.1, on the **Per Site Privacy Actions** screen, enter the ITWS web address (<https://mhitws.cahwnet.gov/>) in the **Address of website** and press **Allow**. The website should then appear in the Managed Websites as Always Allow.

**Figure 3-3.1**



- ❖ For additional issues with cookies, please refer to the browser's help.
- ❖ If cookies are not allowed for the ITWS website, refer to the [online help from Microsoft](#).

## Chapter 3: The Online System Interface

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### Navigating to the ITWS website

The ITWS website can be accessed from any workstation connected to the Internet via the DMH website by browsing to <http://www.dmh.ca.gov/>.



To access ITWS website:

1. Browse to <http://www.dmh.ca.gov/>.
2. As seen in Figure 3-4.1, once at the primary California DMH website, navigate to the **Partners and Providers** tab and click on the Information Technology Web Services (ITWS) link.

Figure 3-4.1



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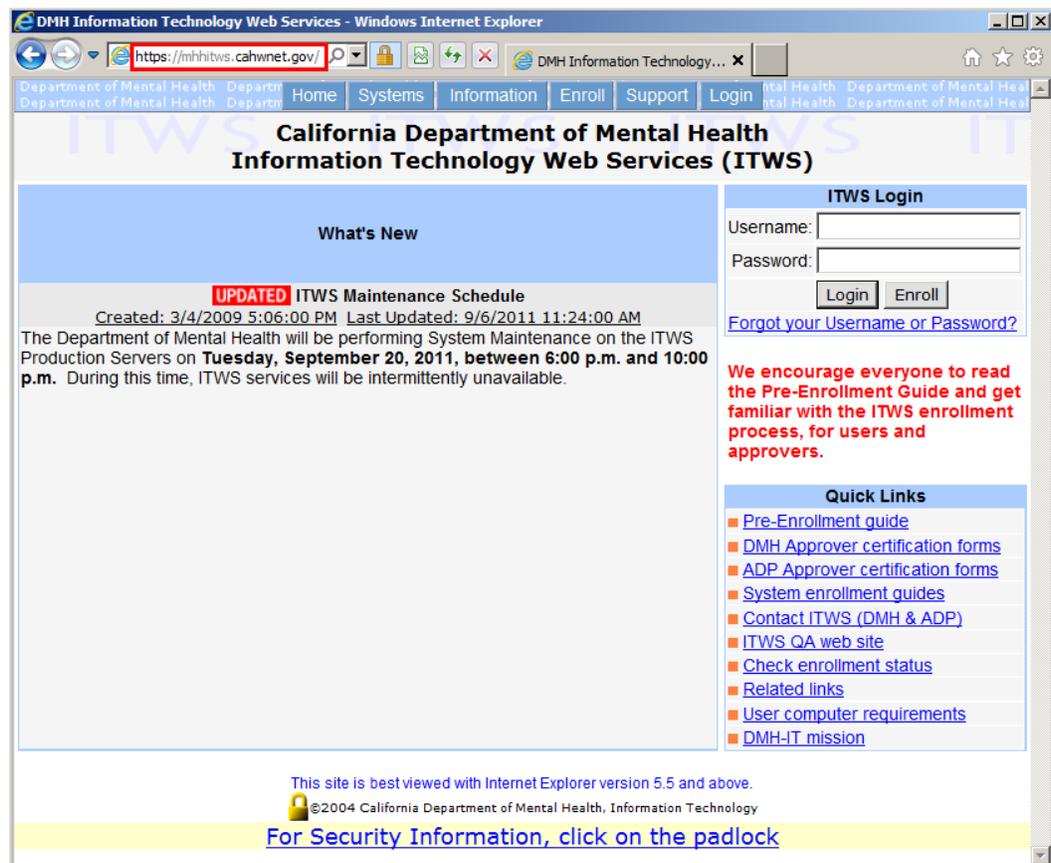
**Note:** As seen in Figure 3-4.2, you can also navigate directly to the DMH Information Technology Web Services (ITWS) page by browsing to the following website: <https://mhitws.cahwnet.gov/>

---

3. Once at the ITWS homepage, login information must be entered into the **ITWS Login**. Both usernames and passwords are case sensitive.

## Chapter 3: The Online System Interface

Figure 3-4.2



4. Once logged into the system, the user session will remain open until the browser session is closed, the session reaches the idle time limit and automatically expires or the user selects the ITWS menu option to **Logout**, as seen in Figure 3-4.3.

Figure 3-4.3



### ITWS What's New

Under the **What's New** section, important notifications and other information including system maintenance and downtime are posted.

## Chapter 3: The Online System Interface

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### ITWS Utilities Menu

The ITWS utilities menu allows users to change their user settings, and it is also the portal to the user management application for the Approver Designee. As seen in Figure 3-5.1, the **Utilities** menu has the following menu options.

➤ **ITWS Utilities Menu Options:**

1. **Change Password**
    - Allows users to change their own passwords.
  2. **User Preferences**
    - Allows users with appropriate permissions to set their preferences.
  3. **User Profile**
    - Allows users to view their current contact information and profile settings. The user can also view the **Memberships Process Log, Pending Memberships** or **Approved Memberships**.
  4. **Request Additional Membership**
    - Allows user to request additional membership permissions and authority as needed.
  5. **Approver Management**
    - Provides a portal to the Approver Management website for managing user membership requests, groups and roles.
- ❖ Refer to [Chapter 5 “Managing DCR Users”](#) at the section for [“Enrolling an Existing ITWS User for New Access to the FSP DCR”](#) for details about requesting additional memberships.
- ❖ Refer to [Chapter 5 “Managing DCR Users”](#) for additional information about using the Approver Management website.

Users are able to change their passwords by accessing the **Utilities** menu and selecting **Change Password**.

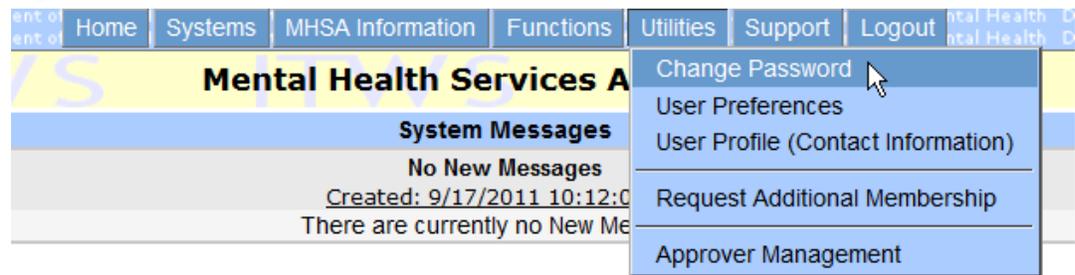


**To change a password:**

1. As seen in Figure 3-5.1, select the **Utilities** menu and select **Change Password**.

## Chapter 3: The Online System Interface

Figure 3-5.1



**Note:** The password policy requires that passwords be a minimum of 6 characters.

2. To change the password, enter the current password in the **Last Used Password** field and enter the new password in both the **New Password** and **Confirm Password** fields.

Figure 3-5.2

The screenshot shows the 'Change ITWS Password' form. The form has a title bar 'Change ITWS Password' and a 'User:' section. Below this, it states 'Your password will not expire. Password is case sensitive. Password must be:' followed by two bullet points: 'At least 6 characters.' and 'Re-entered exactly as typed here during login'. There are three input fields: 'Last used Password:', 'New Password:', and 'Confirm Password:'. A 'Change Password' button is located at the bottom of the form, with a mouse cursor pointing to it.

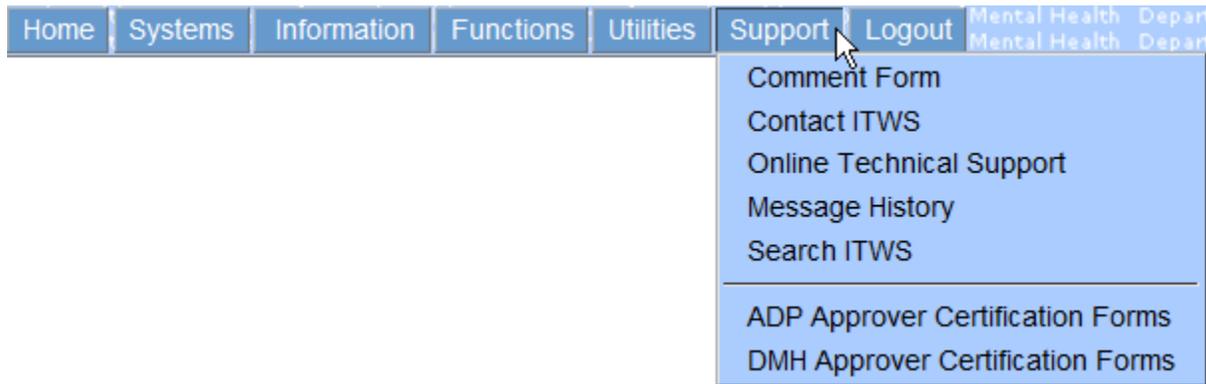
## Chapter 3: The Online System Interface

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### ITWS Support Menu

As seen in Figure 3-6.1, from the **ITWS Support** Menu, users can access the **Comment Form**, find information to **Contact ITWS**, access **Online Technical Support** information, and view **Message History**.

Figure 3-6.1



➤ **ITWS Support Menu Options:**

**1. Comment Form**

- The **Comment Form** allows any user to submit feedback directly to the ITWS team.

**2. Contact ITWS**

- The **Contact ITWS** page includes contact information for ITWS General Support, as well as other system help desks.
- For most support issues related to the ITWS system such as assistance with user ID's, passwords, connectivity, and encryption, the ITWS Help Desk can be reached by email at [itws@dmh.ca.gov](mailto:itws@dmh.ca.gov).

**3. Online Technical Support**

- The **Online Technical Support** page includes articles published by the ITWS helpdesk. This includes information about system bugs, how-to instruction, and general information.

**4. Message History**

- Message History allows users to view all system messages including User Messages, messages about the MHSA system as well as messages by status including Pending, Private and Public.

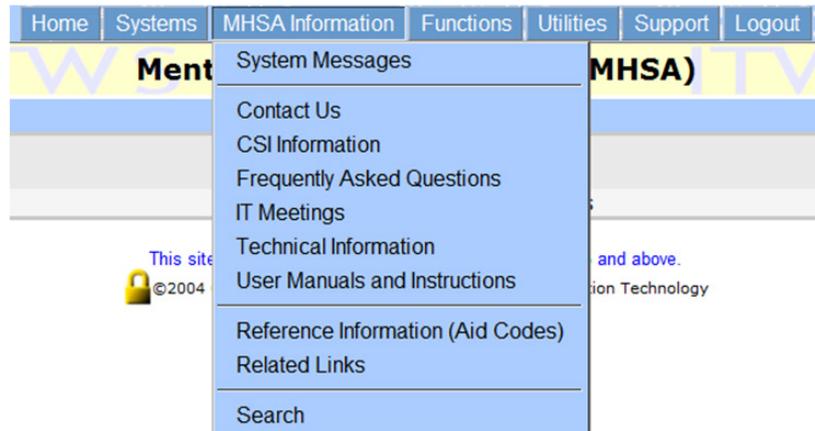
## Chapter 3: The Online System Interface

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### MHSA Information Menu

As seen in Figure 3-7.1, from the **ITWS Systems** Menu, users can access the **Mental Health Services Act (MHSA)** system. Once the system is selected, a new heading **MHSA Information** appears on the ITWS bar, as seen in Figure 3-8.1.

Figure 3-7.1



The **Technical Information** website contains useful historic and updated documents about the technical aspects of the FSP DCR, which are useful for XML batch submission.

- ❖ Refer to [Chapter 6 “Data Reporting Options”](#) for additional information on submitting data via XML batch submission.

### Accessing the FSP DCR Application

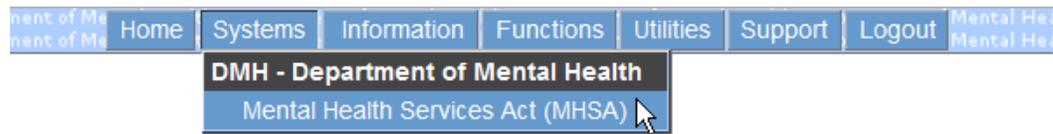
To access the FSP DCR application, the MHSA system must be selected.

 **To access the FSP DCR application:**

1. Navigate to the ITWS website.
- ❖ Refer to [Chapter 3 “The Online System Interface” at the section “Navigating to the ITWS website”](#) for additional information on locating the ITWS website.
2. As seen in Figure 3-8.1, from the menu at the top of the screen, click on the **Systems** menu and select the **Mental Health Services Act (MHSA)**.

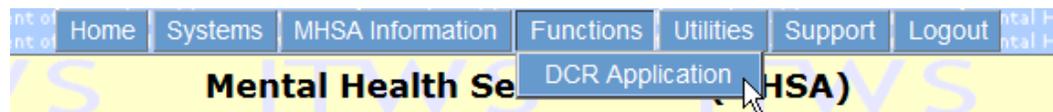
## Chapter 3: The Online System Interface

**Figure 3-8.1**



3. After selecting the MHSA system, the top menu will change and a new set of menu options will be available. As seen in Figure 3-8.2, click on **Functions** menu and select the **DCR Application**.

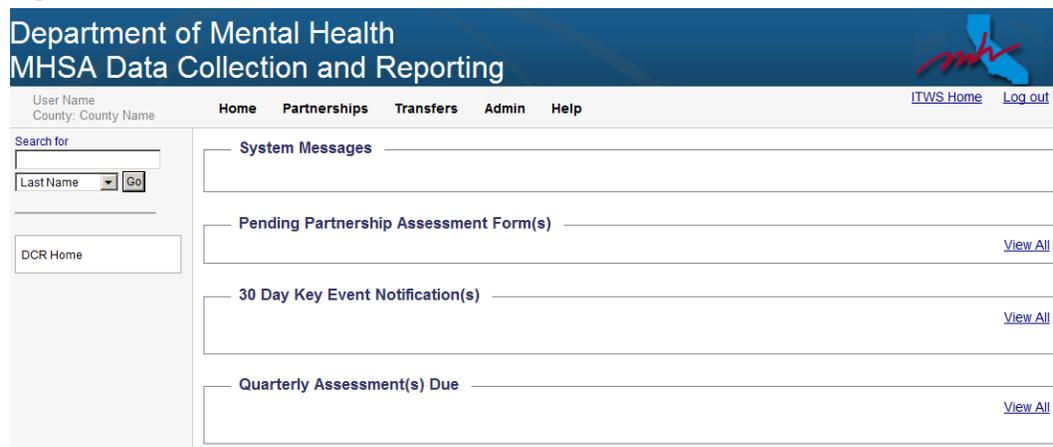
**Figure 3-8.2**



### Using the DCR Interface

Once logged into the DCR interface for the MHSA system, the DCR Home Page will be displayed as seen in Figure 3-9.1.

**Figure 3-9.1**



**Note:** The **ITWS Home** link allows the user to exit the FSP DCR system and return to the DMH ITWS homepage without logging out. The **Log out** link will end the user's session to both the FSP DCR and ITWS systems, returning the user to the primary ITWS Login page.

### DCR Menu Options

Depending on the user's role, the FSP DCR system has up to five primary menu options. All menu options are not visible to all users.

## Chapter 3: The Online System Interface

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- ❖ Refer to [Chapter 5 “Managing DCR Users”](#) to see a complete list of roles and associated available menu options.

➤ **FSP DCR System Main Menu Options:**

1. Home
2. Partnerships
3. Transfers
4. Admin
5. Help

As seen in Figure 3-10.1, the **Home** menu contains a link to the **DCR Home** page. From anywhere within the FSP DCR system, this link will allow the user to return to the primary home page shown previously in this chapter.

**Figure 3-10.1**



As seen in Figure 3-10.2, the **Partnerships** menu can be used to add new partners into the FSP DCR system by creating the initial PAF and can manage both active and inactive partners.

**Figure 3-10.2**



As seen in Figure 3-10.3, for authorized users, the **Transfers** menu allows users to access the portion of the website that allows for the download of FSP data files.

**Figure 3-10.3**



## Chapter 3: The Online System Interface

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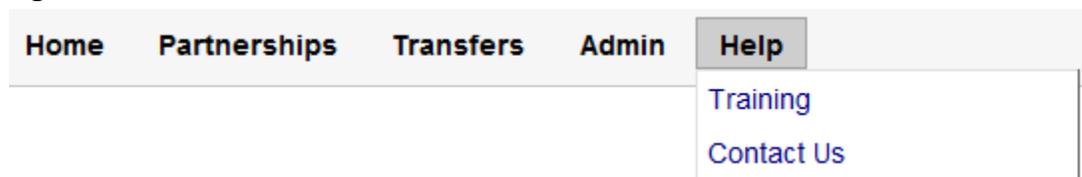
As seen in Figure 3-10.4, for authorized users, the **Admin** menu allows users to access forms (such as the PAF, KET, and 3M assessment forms) in a printer friendly format, view or share FSP groups, and access the System Messages interface where new system messages can be added and current messages can be viewed. For authorized user roles, users can also view or add Virtual PSCs.

**Figure 3-10.4**



As seen in Figure 3-10.5, the **Help** menu offers links to training materials published on the DMH website as well as contact information for DMH Performance Outcomes and Quality Improvement (POQI) group.

**Figure 3-10.5**



### Support

To provide feedback, comments and input regarding the FSP DCR, contact the POQI support group at [POQI.Support@dmh.ca.gov](mailto:POQI.Support@dmh.ca.gov).

## Chapter 6: Data Reporting Options

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### Certifying Counties for XML Data Submission

In addition to the criteria lists in Chapter 4 “Enrolling and Certifying a County”, the following criteria must also be met for XML counties.

➤ **Additional Criteria Required for Certifying XML Counties:**

1. All users who will submit XML batch files are enrolled in ITWS Production and have XML-Update role
2. All 12 forms have been successfully submitted in QA
3. No high-severity FATAL errors (e.g., errors that impact security)
4. Low failure rate (<5%) for low-security errors
5. Error messages that consistently occur should be fixed
6. Review Re-activation process
7. An understanding that **PreviousPartnerGUID** can only be used once
8. Counties have spot-checked their data using FSP DCR online system in QA to ensure that FSP DCR data match what is in their system and sent a confirmation email to IT/POQI

### Chapter 7: Establishing Partners

A partnership is established in the FSP DCR through the PAF. The PAF collects information on the partner's history and current status for administrative data and ten outcome domains.

- ❖ Refer to [Chapter 2 "Introduction to the FSP DCR"](#) for further information on the FSP DCR data hierarchy and outcome domains.

When a partnership is established at a provider site, there are three basic methods in which the initial PAF information can be collected from the partner.

➤ **Methods to Collect PAF Information from Partner at Intake:**

1. Print PAF forms and fill out answers with pen/pencil
2. Fill in PAF form fields through the online FSP DCR application
3. Enter data into another application to later be uploaded to the FSP DCR via XML batch submission

However, no matter which method is used, the partner should be established in the FSP DCR, no later than 90 days after the information is collected at partner intake.

A partnership can be established with partial PAF information. There are six fields that must be completed on the PAF for the PAF to be saved and the partnership to be established.

➤ **Six Required Fields to Establish a Partner:**

1. Partner's First Name
2. Partner's Last Name
3. Partnership Date
4. Partner's Date of Birth
5. Partner's FSP Program ID
6. Partner's PSC ID

Once the partnership is established with a PAF containing information in at least the six fields noted previously in this chapter, the partner becomes active in the FSP DCR such that KET and 3M data can also be submitted for this partner. Information on the PAF can later be updated at any time by submitting updated information for the partner's PAF while it remains in the "Pending" or "Complete" status. When the PAF becomes "Certified" complete, the information on the PAF can no longer be updated.

- ❖ Refer to [Chapter 10 "Managing Partners with the Online FSP DCR"](#) for further details on updating PAF information.

## Chapter 7: Establishing Partners

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### Completing the PAF through Printed Forms

For partners whose information is collected initially on printed forms, there are printer friendly versions of all forms available through the FSP DCR **Admin** menu. The forms should be filled in with complete and valid information such that the information can be used for data entry of a PAF with a “Complete” status in the FSP DCR.

- ❖ Refer to [Chapter 2 “Introduction to the FSP DCR” at section “Data Reporting and Validation Rules”](#) for an overview of the data reporting rules which must be met for valid data on the PAF.



#### To Access Printer Friendly Forms:

1. Log into ITWS and access the FSP DCR application.
- ❖ Refer to [Chapter 3 “The Online System Interface” at section “Accessing the FSP DCR Application”](#) for details on accessing the FSP DCR application.
2. As seen in Figure 7-1.1, select the **Admin** menu and the **Forms – Printer Friendly** submenu.

Figure 7-1.1



3. You will be directed to the following DMH website where all printer friendly FSP DCR forms can be accessed. Select the appropriate form to download and print.
- Website for printer friendly forms:  
[http://www.dmh.ca.gov/POQI/Full\\_Service\\_Forms.asp](http://www.dmh.ca.gov/POQI/Full_Service_Forms.asp)

---

**Note:** If you do not have access to the **Admin** menu in the FSP DCR, you can use the link above to browse directly to the website with printer friendly forms.

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## Chapter 7: Establishing Partners

### Completing the PAF through the Online FSP DCR

The following instructions apply to DCR counties who enter each partner's information through the online FSP DCR.



#### To Fill in PAF Form Fields through the Online FSP DCR Application:

1. Log into ITWS and access the FSP DCR application.
- ❖ Refer to [Chapter 3 “The Online System Interface”](#) at section [“Accessing the FSP DCR Application”](#) for details on accessing the FSP DCR application.
2. As seen in Figure 7-2.1, select the **Partnerships** menu and the **Add New Partner (PAF)** submenu.
3. As seen in Figure 7-2.1, enter the partner's date of birth and partnership date, and select the **Get Form** button.

**Figure 7-2.1**

4. As seen in Figure 7-2.2, the complete PAF form for the appropriate age group appears on the next page. Fill in the **Partnership Information**. The **CSI County Client Number (CCN)** is automatically checked against the CSI database of IDs, and a notification will appear when the CCN does not match any CSI records. All fields with a red asterisk are required fields. There are four required fields on this page that must be completed.

---

**Note:** Several demographic fields (gender, race, and ethnicity) are populated from the CSI database via the CCN. Although a valid CCN is not required to establish a partnership, the PAF will remain in the “Pending” status until a valid CCN is provided.

---

## Chapter 7: Establishing Partners

- As seen in Figure 7-2.2, select the **Administrative Information** link to expand the next section of form fields.

**Figure 7-2.2**

Department of Mental Health  
MHS Data Collection and Reporting

County: County 59    Home   Partnerships   Transfers   Admin   Help    [ITWS Home](#)   [Log out](#)

Search for  
Last Name    Go

Add New Partner (PAF)

**FULL SERVICE PARTNERSHIP**  
Transition Age Youth Partnership Assessment Form  
FOR AGES 16-25 YEARS

[Expand all Domains](#)

**PARTNERSHIP INFORMATION**    [Clear Domain](#)

|                                      |           |                                 |
|--------------------------------------|-----------|---------------------------------|
| County                               | County 59 | *                               |
| CSI County Client Number (CCN)       | 256689875 | CSI # did not match our records |
| County Partner ID (optional)         | 1555      | *                               |
| Partner's First Name                 | Junie     | *                               |
| Partner's Last Name                  | Jones     | *                               |
| Partnership Date (mm/dd/yyyy)        | 7/1/2009  | *                               |
| Partner's Date of Birth (mm/dd/yyyy) | 3/18/1992 | *                               |

Who referred the partner? (mark one)

|  |   |   |
|--|---|---|
| <input type="radio"/> Self   | <input type="radio"/> Emergency Room                              | <input type="radio"/> Homeless Shelter  |
| <input checked="" type="radio"/> Family Member (e.g., parent, guardian, sibling, aunt, uncle, grandparent) | <input type="radio"/> Mental Health Facility / Community Agency   | <input type="radio"/> Street Outreach   |
| <input type="radio"/> Significant Other (e.g., boyfriend / girlfriend, spouse)                             | <input type="radio"/> Social Services Agency                      | <input type="radio"/> Juvenile Hall / Camp / Ranch / Division of Juvenile Justice |
| <input type="radio"/> Friend / Neighbor (i.e., unrelated other)  | <input type="radio"/> Substance Abuse Treatment Facility / Agency | <input type="radio"/> Jail / Prison   |
| <input type="radio"/> School   | <input type="radio"/> Faith-based Organization                    | <input type="radio"/> Acute Psychiatric / State Hospital                          |
| <input type="radio"/> Primary Care / Medical Office  | <input type="radio"/> Other County / Community Agency             | <input type="radio"/> Other   |

5. → **ADMINISTRATIVE INFORMATION**

- As seen in Figure 7-2.3, fill in the fields for **Administrative Information**. The **Provider Number / NPI (optional)** is automatically checked against the list of providers, and a notification will appear when the NPI does not match any records. It is not required for the NPI to match. There are two required fields on this page that must be filled. The county's registered FSP programs will appear in the **Full Service Partnership Program ID** drop-down list. The county's enrolled PSC users and virtual PSCs will appear in the **Partnership Coordinator ID** drop-down list.

## Chapter 7: Establishing Partners

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7. At this point, all of the six fields required to establish the partnership should be completed. It is recommended that you save the partially complete PAF at this time to establish the partnership. As seen in Figure 7-2.3, select the **Save and Continue** link at the bottom of the **Administrative Information** section.

---

**Note:** The FSP DCR will allow 20 minutes to complete or save the PAF or it will “time out”. (A popup time will appear when you have 5 minutes or less remaining, and you will be able to renew your session.) However, when the FSP DCR logs you off after running out of time, you will lose all work you have done since you last saved the PAF. Once you save or submit the incomplete PAF, you will be able to return to the pending PAF for that partner at any time and continue entering PAF information. The time limit will still apply, so always save any information you have completed before stepping away from the FSP DCR application.

---

8. As seen in Figure 7-2.3, a message will appear that some error(s) were present with the submission, and the assessment will be saved with a pending status. Click **OK**. It may take a few seconds for the FSP DCR to save the PAF. A message will appear at the bottom of the form that the assessment was successfully saved.

## Chapter 7: Establishing Partners

Figure 7-2.3

The screenshot displays a web form titled "ADMINISTRATIVE INFORMATION" with a "Clear Domain" link in the top right. The form is divided into two main sections: "PARTNERSHIP STATUS" and "PROGRAM INFORMATION".

**PARTNERSHIP STATUS**

|                                     |  |                      |
|-------------------------------------|--|----------------------|
| Provider Number / NPI (Optional)    | <input type="text" value="A458"/>  | Provider # not found |
| Full Service Partnership Program ID | <input type="text" value="WRAP, Children and TAY Full Service/Wraparound Pr"/> | *                    |
| Partnership Service Coordinator ID  | <input type="text" value="Mendel, Gene"/>                                      | *                    |

**PROGRAM INFORMATION**

In which additional program(s) is the partner CURRENTLY involved? (mark all that apply)

|                                      |                          |
|--------------------------------------|--------------------------|
| AB2034                               | <input type="checkbox"/> |
| Governor's Homeless Initiative (GHI) | <input type="checkbox"/> |
| MHSA Housing Program                 | <input type="checkbox"/> |

At the bottom right of the form, there is a "Save and Continue" button. Below the form, there are several navigation links: "RESIDENTIAL INFORMATION - includes hospitalization and incarceration", "EDUCATION", "EMPLOYMENT", "SOURCES OF FINANCIAL SUPPORT", "LEGAL ISSUES / DESIGNATIONS", "EMERGENCY INTERVENTION", "HEALTH STATUS", "SUBSTANCE ABUSE", and "COUNTY USE QUESTIONS". At the bottom left, there are "Submit", "Cancel", and "Print" buttons. At the bottom right, there is an "Expand all Domains" link. A "Click here for Validation Report" link is also present.

An error message dialog box titled "Message from webpage" is overlaid on the bottom right. It contains a question mark icon and the text: "There were some error(s) present with the submission. Please click ok to store the assessment with pending status or click cancel to fix the error(s) and submit again." The "OK" button is highlighted with a red box.

Red arrows and numbers indicate specific actions: "6." points to the "Provider # not found" error message; "7." points to the "Expand all Domains" link; and "8." points to the "OK" button in the error message dialog.

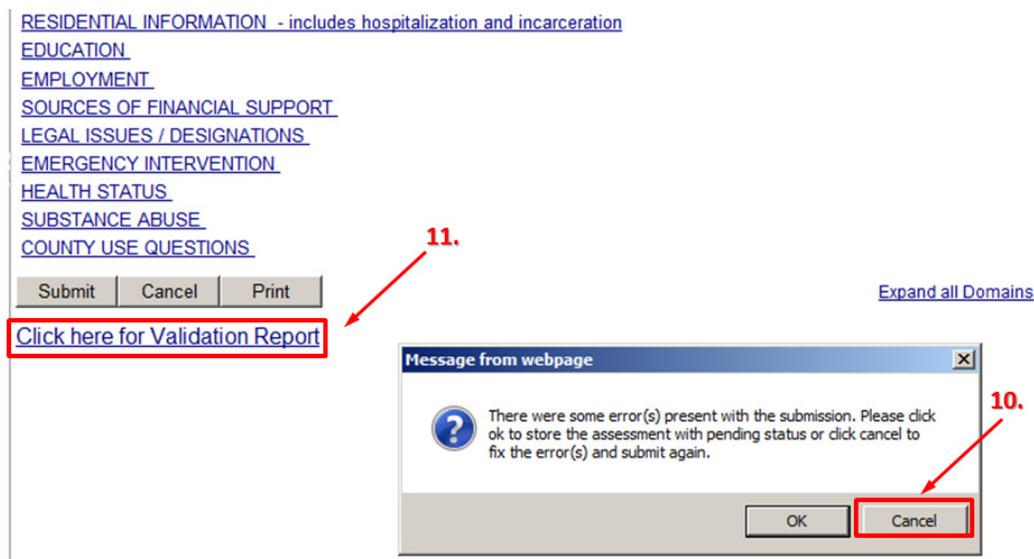
9. Continue entering information in the PAF by selecting the links to expand each domain of questions on the form. There are options to **Expand all Domains** at once or to **Clear Domain** if needed. Save your work as you go. Each time an error message will appear that you are about to overwrite and existing assessment. Select **OK** to continue on the first popup box. Select **OK** again to store the PAF as pending on the second dialogue box.
- ❖ Refer to [Chapter 2 "Introduction to the FSP DCR" at section "Data Reporting and Validation Rules"](#) for an overview of the data reporting rules which must be met to enter valid data for each domain.
10. (Optional) If you would like to see a Validation Report of the errors that exist on the PAF at its current status while entering data, click on the **Save and Continue** link. Select **OK** to continue on the first popup box. As seen in Figure 7-2.4, select **Cancel** and do not store the PAF as pending on the second dialogue.

## Chapter 7: Establishing Partners

11. (Optional) As seen in figure 7-2.4, a link will appear below the **Submit**, **Cancel** and **Print** buttons to **Click here for Validation Report**. Select the link to see a list printable of information which must be completed for the PAF to be stored with a “Complete” status.

**Note:** If you receive an error message that you have answered in two competing sections of a domain (e.g., you have answered in sections for both the TAY who are legally required to attend school and for those who are not legally required to attend school), you may be unable to manually clear the answers you selected in one section to clear the error. In that case, use the **Clear Domain** link to reset all of the option radio buttons for that domain to unselected and then re-enter only the information in the correct section.

**Figure 7-2.4**



12. When you have completed entering information to the PAF, click the **Submit** button to save and exit the PAF. If all fields have been entered correctly, the PAF will be stored with a status of “Complete”. If there are any validation errors, which can be viewed on the validation report, the PAF will be stored with a status of “Pending”.

❖ Refer to [Chapter 10 “Managing Partners with the Online FSP DCR” at section “Certifying and Decertifying a PAF as Complete”](#) for further information on manually setting a “Pending” PAF Status to certified “Complete”.

## Chapter 7: Establishing Partners

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13. As seen in Figure 7-2.5, you will then see a screen notification that the PAF was stored successfully. If desired, you can navigate to the active partner screen for the partner just established through clicking the top link; “Click here to return to (partner’s name) on the Active Full Service Partners screen” or you can return to the list of all active partners by selecting the bottom link; “Click here to return to the Active Full Service Partners screen”

**Figure 7-2.5**



- ❖ Refer to [Appendix A “Data Reporting and Validation Rules”](#) for an overview of the data reporting rules which must be met to enter valid data for each domain.
-

### Chapter 8: Working with KETs

After a partnership is established, information on the status of the partner for certain domain areas can be tracked through time in the FSP DCR using the KET form.

- ❖ Refer to [Chapter 2 “Introduction to the FSP DCR”](#) at Table 2-2 for details of which domain areas are tracked by the KET or 3M.

When a partner’s status changes for one of the KET tracked domain areas, a KET is submitted to the FSP DCR with the new status date (if applicable) and status information. One KET form can submit one change for every question tracked through key events. If a partner has several changes in status for the same question (e.g., the partner changes residential status several nights in a row), then a separate KET will need to be entered for each change.

Like the PAF, there are three basic methods in which the KET information can be collected from the partner.

- **Methods to Collect KET Information from a Partner:**
  1. Print KET forms and fill out answers with pen/pencil
  2. Fill in KET form fields through the online FSP DCR application
  3. Enter data into another application to later be uploaded to the FSP DCR via XML batch submission

However, no matter which method is used, the information for the partner should be updated in the FSP DCR no later than 90 days after the date of the event.

#### Completing the KET through Printed Forms

The following instructions apply to DCR counties who collect each partner’s information through the FSP forms.

##### To Fill in KET Form Fields through Printed Forms:

1. Follow the instructions for “To Access Printer Friendly Forms” in Chapter 7 “Establishing Partners” at the [“Completing PAF through Printed Forms”](#).

## Chapter 8: Working with KETs

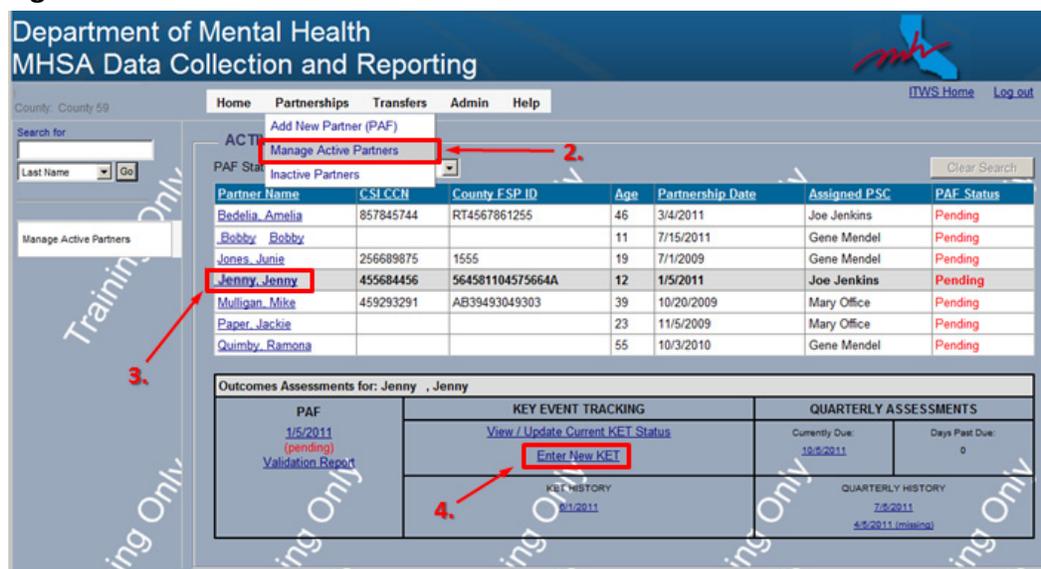
### Completing the KET through the Online FSP DCR

The following instructions apply to DCR counties who enter each partner's information through the online FSP DCR.

#### To Fill in KET Form Fields through the Online FSP DCR Application:

1. Log into ITWS and access the FSP DCR application.
- ❖ Refer to [Chapter 3 “The Online System Interface”](#) at section [“Accessing the FSP DCR Application”](#) for details on accessing the FSP DCR application.
2. As seen in Figure 8-1.1, select the **Partnerships** menu and the **Manage Active Partners** submenu.
3. As seen in Figure 8-1.1, select the partner from the displayed list or search for the partner of interest via the **Search for** box.
- ❖ Refer to [Chapter 10 “Managing Partners with the Online FSP DCR”](#) for further details on locating a partner in the FSP DCR.
4. As seen in Figure 8-1.1, select the **Enter New KET** link under the **KEY EVENT TRACKING** section of the table which appears.

Figure 8-1.1



Department of Mental Health  
MHA Data Collection and Reporting

County: County 59

Home Partnerships Transfers Admin Help

ITWS Home Log out

Search for  
Last Name Go

Manage Active Partners

ACTIVE Partnerships  
Add New Partner (PAF)  
Manage Active Partners  
Inactive Partners

| Partner Name    | C/S/CCN   | County FSP ID    | Age | Partnership Date | Assigned PSC | PAF Status |
|-----------------|-----------|------------------|-----|------------------|--------------|------------|
| Bedelia, Amelia | 857845744 | RT4567861255     | 46  | 3/4/2011         | Joe Jenkins  | Pending    |
| Bobby, Bobby    |           |                  | 11  | 7/15/2011        | Gene Mendel  | Pending    |
| Jones, Junia    | 256689875 | 1555             | 19  | 7/1/2009         | Gene Mendel  | Pending    |
| Jenny, Jenny    | 455684456 | 564581104575664A | 12  | 1/5/2011         | Joe Jenkins  | Pending    |
| Mulligan, Mike  | 459293291 | AB39493049303    | 39  | 10/20/2009       | Mary Office  | Pending    |
| Paper, Jackie   |           |                  | 23  | 11/5/2009        | Mary Office  | Pending    |
| Quimby, Ramona  |           |                  | 55  | 10/3/2010        | Gene Mendel  | Pending    |

Outcomes Assessments for: Jenny, Jenny

| PAF  | KEY EVENT TRACKING                                | QUARTERLY ASSESSMENTS                              |                     |
|--|---|--|---------------------|
| 1/5/2011<br>(pending)<br>Validation Report | View / Update Current KET Status<br>Enter New KET | Currently Due:<br>10/5/2011                        | Days Past Due:<br>0 |
|  | KET HISTORY<br>8/1/2011                           | QUARTERLY HISTORY<br>7/6/2011<br>4/5/2011 (missed) |                     |

## Chapter 8: Working with KETs

---

5. As seen in Figure 8-1.2, enter the date the KET form was completed. If the KET information was collected on a printed form, then enter the date the printed form was completed. Select **Get Form**.

**Figure 8-1.2**



6. As seen in Figure 8-1.3, select each domain and record all of the current key event information with the date of each event (as applicable). A different date can be entered for each event. Click the **Submit** button.

---

**Note:** *The following note is very important.* If the KET will include a change in partnership status (discontinuation), then other information about the partnership should not be entered on the same KET. A KET which contains a partnership status change cannot be edited or deleted at any point. If a partner is about to be discontinued, all other events and information about the partner should be entered on separate KET prior to submitting the KET for the discontinuation. Once the partner is discontinued, the partner becomes inactive and no new KETs can be made for the partner while the partner is inactive.

*The only way to resolve incorrect data on a KET which also contains a partnership status change is to delete the partner and all associated assessments and create a new partner by resubmitting all of the partner's assessments. When performing this function, make sure to avoid the same problem in the future by ensuring that all KETs with a partnership status change do not contain any other partnership information.*

---

## Chapter 8: Working with KETs

Figure 8-1.3

The screenshot shows the 'FULL SERVICE PARTNERSHIP' form for a 'Child / Youth Key Event Tracking Form FOR AGES 0-15 YEARS'. The form is titled 'PARTNERSHIP INFORMATION' and contains the following fields:

|                                      |                  |
|--------------------------------------|------------------|
| County                               | County 59        |
| CSI County Client Number (CCN)       | 455684456        |
| County Partner ID (optional)         | 564581104575664A |
| Partner's First Name                 | Jenny            |
| Partner's Last Name                  | Jenny            |
| Date Completed (mm/dd/yyyy)          | 7/1/2011         |
| Partner's Date of Birth (mm/dd/yyyy) | 05/05/1999       |

Below the form, there are several sections with links to skip sections if there are no changes:

- [CHANGE IN ADMINISTRATIVE INFORMATION](#) (Skip this section if there are no changes)
- [RESIDENTIAL INFORMATION](#) - includes hospitalization and incarceration (Skip this section if there are no changes)
- [EDUCATION](#) (Skip this section if there are no changes)
- [EMPLOYMENT](#) (Skip this section if there are no changes)
- [LEGAL ISSUES / DESIGNATIONS](#) (Skip this section if there are no changes)
- [EMERGENCY INTERVENTION](#) (Skip this section if there are no changes)
- [COUNTY USE QUESTIONS](#) (Skip this section if there are no changes)

At the bottom of the form, there are 'Submit', 'Cancel', and 'Print' buttons. The page also includes a search bar on the left and navigation links at the top.

7. As seen in Figure 8-1.4, you will then see a screen notification that the KET was stored successfully. If desired, you can navigate to the active partner screen for the partner just established through clicking the top link; or you can return to the list of all active Partner partners by selecting the bottom link.

Figure 8-1.4

The screenshot shows a 'Success' notification message on the same system. The message reads: 'Key Event assessment for Jenny, Jenny has been successfully stored. Thank you for submitting your data.' Below the message, there are two links: 'Click here to return to Jenny, Jenny on the Active Full Service Partners screen' and 'Click here to return to the Active Full Service Partners screen'.

## Chapter 8: Working with KETs

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- ❖ Refer to [Appendix A: “Data Reporting and Validation Rules”](#) for an overview of the data reporting rules which must be met to enter valid data for each domain.
-

### Chapter 9: Working with 3Ms

Every 3 months after a partnership is established, information on the status of the partner for certain domain areas is updated through the FSP DCR using the 3M form. The 3M assessment must be collected up to 15 days before or 30 days after it is due.

- ❖ Refer to [Chapter 2 “Introduction to the FSP DCR”](#) at Table 2-2 for details on which domain areas are tracked by the KET or 3M.

On the 3Ms, the current status of partnership information for the relevant domains must be entered, even if it is the same status as was entered on the PAF.

Like the PAF & KET, there are three basic methods in which the 3M information can be collected from the partner.

➤ **Methods to Collect 3M Information from Partner:**

1. Print 3M forms and fill out answers with pen/pencil
2. Fill in 3M form fields through the online FSP DCR application
3. Enter data into another application to later be uploaded to the FSP DCR via XML batch submission

However, no matter which method is used, the information for the partner should be updated in the FSP DCR no later than 90 days after the date of the event.

#### Completing the 3M through Printed Forms

The following instructions apply to DCR counties who collect each partner’s information through the printed FSP forms.



**To Fill in 3M Form Fields through Printed Forms:**

1. Follow the instructions for “To Access Printer Friendly Forms” in Chapter 7 “Establishing Partners” at the [“Completing PAF through Printed Forms”](#).

#### Completing the 3M through the Online FSP DCR

The following instructions apply to DCR counties who enter each partner’s information through the online FSP DCR.

## Chapter 9: Working with 3Ms

---



### To Fill in 3M Form Fields through the Online FSP DCR Application:

1. Log into ITWS and access the FSP DCR application.
- ❖ Refer to [Chapter 3 “The Online System Interface” at section “Accessing the FSP DCR Application”](#) for details on accessing the FSP DCR application.
2. As seen in Figure 9-1.1, select the **Partnerships** menu and the **Manage Active Partners** submenu.
3. As seen in Figure 9-1.1, select the partner from the displayed list or search for the partner of interest via the **Search for** box.
- ❖ Refer to [Chapter 10 “Managing Partners with the Online FSP DCR”](#) for further details on locating a partner in the FSP DCR.
4. As seen in Figure 9-1.1, select the date of the 3M to be completed under the **Quarterly Assessments** box.

---

**Note:** The 3Ms become due every three months on the same day of the month as the partnership was established. A link will appear in the FSP DCR **Currently Due** box for an upcoming 3M assessment 15 days before it becomes due. The link indicates the date the 3M is due. The FSP DCR allows a 3M assessment to be collected from a partner up to 15 days before or 30 days after it is due. Thirty days after the 3M was due, the link for the 3M moves down to the **Quarterly History** box, where it displays a **(missing)** notification if no information has ever been entered in the assessment form.

---

## Chapter 9: Working with 3Ms

Figure 9-1.1

Department of Mental Health  
MSHA Data Collection and Reporting

County: County 59

Home Partnerships Transfers Admin Help

Search for  
Last Name Go

Manage Active Partners

ACTIVE  
Add New Partner (PAF)  
Manage Active Partners  
Inactive Partners

| Partner Name    | CSLCCN    | County ESP ID    | Age | Partnership Date | Assigned PSC | PAF Status |
|-----------------|-----------|------------------|-----|------------------|--------------|------------|
| Bedelia, Amelia | 857845744 | RT4567861255     | 46  | 3/4/2011         | Joe Jenkins  | Pending    |
| Bobby, Bobby    |           |                  | 11  | 7/15/2011        | Gene Mendel  | Pending    |
| Jones, Junie    | 256689875 | 1555             | 19  | 7/1/2009         | Gene Mendel  | Pending    |
| Jenny, Jenny    | 455684456 | 564581104575664A | 12  | 1/5/2011         | Joe Jenkins  | Pending    |
| Mulligan, Mike  | 459293291 | AB39493049303    | 39  | 10/20/2009       | Mary Office  | Pending    |
| Paper, Jackie   |           |                  | 23  | 11/5/2009        | Mary Office  | Pending    |
| Quimby, Ramona  |           |                  | 55  | 10/3/2010        | Gene Mendel  | Pending    |

Outcomes Assessments for: Jenny, Jenny

| PAF  | KEY EVENT TRACKING                                | QUARTERLY ASSESSMENTS         |                     |
|--|---|-------------------------------|---------------------|
| 1/5/2011<br>(pending)<br>Validation Report | View / Update Current KET Status<br>Enter New KET | Currently Due:<br>10/5/2011   | Days Past Due:<br>0 |
|  | KET HISTORY<br>2/1/2011                           | QUARTERLY HISTORY<br>7/5/2011 | 4/5/2011 (initial)  |

- As seen in Figure 9-1.2, enter the date the 3M form was completed. If the 3M information was collected on a printed form, then enter the date the printed form was completed. Select **Get Form**.

Figure 9-1.2

Department of Mental Health  
MSHA Data Collection and Reporting

County: County 59

Home Partnerships Transfers Admin Help

Search for  
Last Name Go

Add New Quarterly

Enter New Quarterly assessment

Select the Partner you want to enter the assessment for: Jenny, Jenny (455684456)

Date Completed (mm/dd/yyyy): 9/22/2011

Get Form

- As seen in Figure 9-1.3, all of the relevant domains for quarterly assessment are displayed. Carefully enter the appropriate information for all questions on the entire form.

**Note:** There are few validation notifications available for data on the 3M assessments. If a 3M assessment is submitted incomplete, there will be no indicator or status to later alert the user of the missing information. Therefore, it is recommended that the 3M assessment be completed in full at the time they are started.

## Chapter 9: Working with 3Ms

Figure 9-1.3

Department of Mental Health  
MHS Data Collection and Reporting

County: County 59

Home Partnerships Transfers Admin Help

Search for  
Last Name Go

Add New Quarterly

**FULL SERVICE PARTNERSHIP**  
Child / Youth Quarterly Assessment Form  
FOR AGES 0-15 YEARS

PARTNERSHIP INFORMATION

|                                      |                  |
|--------------------------------------|------------------|
| County                               | County 59        |
| CSI County Client Number (CCN)       | 455684456        |
| County Partner ID (optional)         | 564581104575664A |
| Partner's First Name                 | Jenny            |
| Partner's Last Name                  | Jenny            |
| Date Completed (mm/dd/yyyy)          | 9/22/2011        |
| Partner's Date of Birth (mm/dd/yyyy) | 05/05/1999       |

EDUCATION  
SOURCES OF FINANCIAL SUPPORT  
LEGAL ISSUES / DESIGNATIONS  
HEALTH STATUS  
SUBSTANCE ABUSE  
COUNTY USE QUESTIONS

Submit Cancel Print

- As seen in Figure 9-1.4, you will then see a screen notification that the 3M was stored successfully. If desired, you can navigate to the active partner screen for the partner just established through clicking the top link; or you can return to the list of all active partners by selecting the bottom link.

Figure 9-1.4

Department of Mental Health  
MHS Data Collection and Reporting

County: County 59

Home Partnerships Transfers Admin Help

Search for  
Last Name Go

**Success**

Quarterly assessment for Jenny , Jenny has been successfully stored. Thank you for submitting your data.

[Click here to return to Jenny , Jenny on the Active Full Service Partners screen](#)

[Click here to return to the Active Full Service Partners screen](#)

## Chapter 9: Working with 3Ms

---

- ❖ Refer to [Appendix A: “Data Reporting and Validation Rules”](#) for an overview of the data reporting rules which must be met to enter valid data for each domain.
-

### Chapter 10: Managing Partners with the Online FSP DCR

The FSP DCR has several menus and tables with links to a partner's information. It is important to understand how the location of the link to the partner's information controls which information is displayed for the partner when the link is selected. When you select on a link of a partner's information from one webpage or table you will see a different form or page of information than when you select the same link from a different location in the FSP DCR.

➤ **Areas of the FSP DCR with Links to a Partner's Information:**

1. **Home** menu and **DCR Home** submenu webpage
  - Pending Partnership Assessment Form(s) Table
  - 30 Day Key Event Notification(s) Table
  - Quarterly Assessment(s) Due Table
2. **Search for** box results webpage
  - for Active Partners
  - for Inactive Partners
3. **Partnerships** menu and **Manage Active Partners** submenu webpage
  - Active Full Service Partners with Pending & Complete Status Table
  - Active Full Service Partners with Deleted Status Table
  - Active Full Service Partners with All Status Table
4. **Partnerships** menu and **Inactive Partners** submenu webpage
5. **Report** menu and **Assessment Counts** submenu report (for SSA role only)

---

**Note:** A FSP DCR user will only see information for partners to which the user has access. Access to partner's information is controlled through a user's group.

---

- ❖ Refer to [Chapter 5 "Managing DCR Users" at section "Managing Groups"](#) for further information about restricted access of partner's information via FSP DCR groups.
- ❖ Refer to ["Accessing Partner Information"](#) later in this chapter for further information on sharing partner information between users.

#### Using DCR Home Notification Tables to Assist Partner Management

The FSP DCR provides three tables on the **DCR Home** webpage designed to assist with managing partners in the FSP DCR. Whether an FSP DCR user submits information on each partner via printed forms, the online FSP DCR or via XML batch method, there are useful

## Chapter 10: Managing Partners with the Online FSP DCR

---

notifications and reports within the FSP DCR to assist a user in identifying incomplete, missing or current information.

➤ **FSP DCR Tables to Assist with Partner Management:**

1. Pending Partnership Assessment Form(s) Table
2. 30 Day Key Event Notification(s) Table
3. Quarterly Assessment(s) Due Table

The **Pending Partnership Assessment Form(s)** Table displays all partners who have incomplete information on the PAF, as identified by the “Pending” status. Clicking on a partner’s name in this table will open the incomplete PAF form for that partner, where the information can be completed or a validation report can be run to identify the missing information for the partner.



**To Manage Partners with the Pending Partnership Assessment Form(s) Table:**

1. Log into ITWS and access the FSP DCR application.
- ❖ Refer to [Chapter 3 “The Online System Interface” at section “Accessing the FSP DCR Application”](#) for details on accessing the FSP DCR application.
2. As seen in Figure 10-1.1, select the **Home** menu and the **DCR Home** submenu. (This is also the default webpage you will see at login.)
3. As seen in Figure 10-1.1, review the list of partners in the **Pending Partnerships Assessment Form(s)** table. Notice that there may be several pages of partners listed. You can navigate to the next page of the table by selecting the page number or the **Next** link or you can select the **View All** link in the upper right corner of the table to view a list of all pending partner PAFs.

The table can also be sorted by any heading by simply clicking on the heading one time for ascending and twice for descending.

4. As seen in Figure 10-1.1, select a partner’s name link to access the incomplete PAF form.

## Chapter 10: Managing Partners with the Online FSP DCR

Figure 10-1.1

Department of Mental Health  
MSHA Data Collection and Reporting

Home Partnerships Transfers Admin Help

County: County 59

Search for: DCR Home

Last Name: [ ] Go

DCR Home

**Pending Partnership Assessment Form(s)**

| Partner Name                   | CSLCCN    | County FSP ID | Age | Partnership Date | Assigned PSC |
|--------------------------------|-----------|---------------|-----|------------------|--------------|
| <a href="#">Avonlea, Anne</a>  |           |               | 80  | 5/30/2011        | Gene Mendel  |
| <a href="#">Bedela, Amelia</a> | 857845744 | RT4567861255  | 46  | 3/4/2011         | Joe Jenkins  |
| <a href="#">Dinoski, Laura</a> |           |               | 69  | 6/2/2011         | Gene Mendel  |
| <a href="#">Joas, Jillian</a>  |           |               | 7   | 5/25/2011        | Mary Office  |
| <a href="#">Jones, Justin</a>  | 256689875 | 1555          | 19  | 7/1/2009         | Gene Mendel  |

1 2 Next Page 1 of 2

30 Day Key Event Notification(s)

| Partner Name                 | CSLCCN    | County FSP ID    | Age | Key Event Date | Reason                     | Total Days | Assigned PSC |
|------------------------------|-----------|------------------|-----|----------------|----------------------------|------------|--------------|
| <a href="#">Jenny, Jenny</a> | 455684456 | 564581104575664A | 12  | 6/30/2011      | State Psychiatric Hospital | 85         | Gene Mendel  |

Quarterly Assessment(s) Due

| Partner Name                   | CSLCCN    | County FSP ID | Age | Due Date  | Days Past Due | Assigned PSC |
|--------------------------------|-----------|---------------|-----|-----------|---------------|--------------|
| <a href="#">Avonlea, Anne</a>  |           |               | 80  | 8/30/2011 | 24            | Gene Mendel  |
| <a href="#">Bedela, Amelia</a> | 857845744 | RT4567861255  | 46  | 9/4/2011  | 19            | Joe Jenkins  |
| <a href="#">Dinoski, Laura</a> |           |               | 69  | 9/2/2011  | 21            | Gene Mendel  |
| <a href="#">Joas, Jillian</a>  |           |               | 7   | 8/25/2011 | 29            | Mary Office  |
| <a href="#">Jones, Justin</a>  | 256689875 | 1555          | 19  | 10/1/2011 | 0             | Gene Mendel  |

1 2 Next Page 1 of 2

5. As seen in Figure 10-1.2, the partner's PAF will be displayed. Select to expand a domain and complete the information in the PAF.
6. (Optional) If you would like to see a Validation Report of the missing information for the PAF, expand one of the domains and click on the **Save and Continue** link. Select **OK** to continue on the first popup box, as seen in Figure 10-1.2.

## Chapter 10: Managing Partners with the Online FSP DCR

Figure 10-1.2

The screenshot displays a web form for entering partner information. The top section contains fields for: CSI County Client Number (CCN) [256689875], County Partner ID (optional) [1555], Partner's First Name [Junie], Partner's Last Name [Jones], Partnership Date (mm/dd/yyyy) [07/01/2009], and Partner's Date of Birth (mm/dd/yyyy) [03/18/1992]. Below these are radio button options for 'Who referred the partner? (mark one)', including Self, Family Member, Significant Other, Friend/Neighbor, School, Primary Care/Medical Office, Emergency Room, Mental Health Facility/Community Agency, Social Services Agency, Substance Abuse Treatment Facility/Agency, Faith-based Organization, Other County/Community Agency, Homeless Shelter, Street Outreach, Juvenile Hall/Camp/Ranch/Division of Juvenile Justice, Jail/Prison, and Acute Psychiatric/State Hospital. A red box highlights the 'ADMINISTRATIVE INFORMATION' section header, with a red arrow labeled '5.' pointing to it. The form continues with 'PARTNERSHIP STATUS' (Provider Number/NPI [A458], Full Service Partnership Program ID [WRAP, Children and TAY Full Service/Wraparound F], Partnership Service Coordinator ID [Mendel, Gene]), 'PROGRAM INFORMATION' (checkboxes for AB2034, Governor's Homeless Initiative (GHI), and MHSA Housing Program), and a list of links for other information sections. A 'Save and Continue' button is highlighted with a red box. A 'Message from webpage' dialog box is open, asking 'You are about to overwrite an existing assessment. Do you want to continue?' with 'OK' and 'Cancel' buttons. The 'OK' button is highlighted with a red box, and a red arrow labeled '6.' points to it. At the bottom, there are 'Submit', 'Cancel', 'Print', and 'Delete' buttons, and an 'Expand all Domains' link.

- (Optional) As seen in Figure 10-1.3, select **Cancel** and do not store the PAF as pending on the second dialogue.
- (Optional) As seen in figure 10-1.3, a link will appear below the **Submit**, **Cancel** and **Print** buttons to **Click here for Validation Report**. Select the link to see a printable list of information which must be completed for the PAF to be stored with a "Complete" status.

Figure 10-1.3

County Partner ID (optional) 1555  
Partner's First Name Junie  
Partner's Last Name Jones  
Partnership Date (mm/dd/yyyy) 07/01/2009  
Partner's Date of Birth (mm/dd/yyyy) 03/18/1992

Who referred the partner? (mark one)

|   |   |   |
|---|---|---|
| <input type="radio"/> Self  | <input type="radio"/> Emergency Room                              | <input type="radio"/> Homeless Shelter  |
| <input type="radio"/> Family Member (e.g., parent, guardian, sibling, aunt, uncle, grandparent) | <input type="radio"/> Mental Health Facility / Community Agency   | <input type="radio"/> Street Outreach   |
| <input type="radio"/> Significant Other (e.g., boyfriend / girlfriend, spouse)                  | <input type="radio"/> Social Services Agency                      | <input type="radio"/> Juvenile Hall / Camp / Ranch / Division of Juvenile Justice |
| <input checked="" type="radio"/> Friend / Neighbor (i.e., unrelated other)                      | <input type="radio"/> Substance Abuse Treatment Facility / Agency | <input type="radio"/> Jail / Prison   |
| <input type="radio"/> School  | <input type="radio"/> Faith-based Organization                    | <input type="radio"/> Acute Psychiatric / State Hospital                          |
| <input type="radio"/> Primary Care / Medical Office   | <input type="radio"/> Other County / Community Agency             | <input type="radio"/> Other   |

ADMINISTRATIVE INFORMATION

PARTNERSHIP STATUS

Provider Number / NPI (Optional) A458

Full Service Partnership Program ID WRAP, Children and TAY Full Service/Wraparound F

Partnership Service Coordinator ID Mendel, Gene

PROGRAM INFORMATION

In which additional program(s) is the partner CURRENTLY involved? (mark all that apply)

|                                      |                          |
|--------------------------------------|--------------------------|
| AB2034                               | <input type="checkbox"/> |
| Governor's Homeless Initiative (GHI) | <input type="checkbox"/> |
| MHSA Housing Program                 | <input type="checkbox"/> |

RESIDENTIAL INFORMATION - includes hospitalization and incarceration

EDUCATION

EMPLOYMENT

SOURCES OF FINANCIAL SUPPORT

LEGAL ISSUES / DESIGNATIONS

EMERGENCY INTERVENTION

HEALTH STATUS

SUBSTANCE ABUSE

COUNTY USE QUESTIONS

Submit Cancel Print Delete

Click here for Validation Report

Message from webpage

There were some error(s) present with the submission. Please click ok to store the assessment with pending status or click cancel to fix the error(s) and submit again.

OK Cancel

Expand all Domains

9. (Optional) Select the **Print** button if you would like to print a copy of the partner's PAF form.
  10. (Optional) You can also choose to delete the partner's PAF by selecting the **Delete** button.
- ❖ Refer to ["Deleting a Partner"](#) later in this chapter for further information on deleting partners in the FSP DCR.
  - 11. When you are satisfied with the information added to the PAF, select the **Submit** button and confirm the submission. If all of the information in the PAF is complete and valid, the PAF Status will change to "Complete".
  - ❖ Refer to ["Certifying a PAF is Complete"](#) later in this chapter for further information on using a certification process to manually change a PAF status to complete.

## Chapter 10: Managing Partners with the Online FSP DCR

---

The **30 Day Key Event Notification(s) Table** displays all partners who have been residing in a temporary setting for 30 days or more. The FSP DCR defines the following settings as temporary.

➤ **FSP DCR Temporary Residential Settings:**

1. Emergency Shelter
2. Homeless
3. Medical Hospital
4. Psychiatric Hospital
5. State Psychiatric
6. Juvenile Hall / Camp
7. Department of Juvenile Justice (DJJ)



**To Manage Partners with the 30 Day Key Event Notification(s) Table:**

1. Log into ITWS and access the FSP DCR application.
- ❖ Refer to [Chapter 3 “The Online System Interface” at section “Accessing the FSP DCR Application”](#) for details on accessing the FSP DCR application.
2. As seen in Figure 10-2.1, select the **Home** menu and the **DCR Home** submenu. (This is also the default webpage you will see at login.)
3. As seen in Figure 10-2.1, review the list of partners in the **30 Day Key Event Notification(s) Table**. Notice that there may be several pages of partners listed. You can navigate to the next page of the table by selecting the page number or the **Next** link or you can select the **View All** link in the upper right corner of the table to view a list of all partners with 30 day key event notifications.  
  
The table can also be sorted by any heading by simply clicking on the heading one time for ascending and twice for descending.
4. As seen in Figure 10-2.1, select a partner’s name link to access the KET on which the last residential change was made. (KETs submitted with other information subsequent to the KET with the residential change will not be displayed from this table.)

## Chapter 10: Managing Partners with the Online FSP DCR

Figure 10-2.1

The screenshot displays the MHS Data Collection and Reporting interface. At the top, there is a navigation bar with 'Home', 'Partnerships', 'Transfers', 'Admin', and 'Help' tabs. Below this, a search bar is visible with 'DCR Home' entered. The main content area is divided into three sections:

- Pending Partnership Assessment Form(s)**: A table with columns: Partner Name, C.S.I.CCN, County FSP ID, Age, Partnership Date, and Assigned PSC. The table lists five partners: Avonlea, Anne; Redela, Amelia; Hoels, Laura; Joas, Jillan; and Jones, June.
- 30 Day Key Event Notification(s)**: A table with columns: Partner Name, C.S.I.CCN, County FSP ID, Age, Key Event Date, Reason, Total Days, and Assigned PSC. The table lists one partner: Jenny, Jenny.
- Quarterly Assessment(s) Due**: A table with columns: Partner Name, C.S.I.CCN, County FSP ID, Age, Due Date, Days Past Due, and Assigned PSC. The table lists five partners: Avonlea, Anne; Redela, Amelia; Hoels, Laura; Joas, Jillan; and Jones, June.

Red boxes and arrows highlight specific elements: 'DCR Home' in the search bar (2), '30 Day Key Event Notification(s)' (3), and 'Jenny, Jenny' in the Key Event Notification table (4). A 'View All' link is also highlighted in the Key Event Notification table (5).

5. As seen in Figure 10-2.2, a popup box will notify you that the information in the KET displayed is read only from this area of the FSP DCR. You can review all of the information on the KET that was submitted in which it placed the partner in the current residential setting. If the information in the KET requires correction, note the **Date Completed (mm/dd/yyyy)** field date, and navigate to the Manage Active Partners screen to correct the KET for that partner on that completion date.
- ❖ Refer to [Chapter 11 "Data Correction"](#) for details on correcting KET data in the FSP DCR application.

Figure 10-2.2

Department of Mental Health  
MHS Data Collection and Reporting

County: County 59    Home   Partnerships   Transfers   Admin   Help

Search for: Last Name [Go]

Update Existing KET

**FULL SERVICE PARTNERSHIP**  
Child / Youth Key Event Tracking Form  
FOR AGES 0-15 YEARS

**PARTNERSHIP INFORMATION**

|                                      |                  |
|--------------------------------------|------------------|
| County                               | County 59        |
| CSI County Client Number (CCN)       | 455684456        |
| County Partner ID (optional)         | 564581104575664A |
| Partner's First Name                 | Jenny            |
| Partner's Last Name                  | Jenny            |
| Date Completed (mm/dd/yyyy)          | 07/01/2011       |
| Partner's Date of Birth (mm/dd/yyyy) | 05/05/1999       |

**CHANGE IN ADMINISTRATIVE INFORMATION** (Skip this section if there are no changes)

**PARTNERSHIP STATUS**

Date of Provider Number / NPI Change (mm/dd/yyyy):

NEW Provider Number / NPI:

Date of Full Service Partnership Program ID Change (mm/dd/yyyy):

NEW Full Service Partnership Program ID:

Date of Partnership Service Coordinator Change (mm/dd/yyyy): 07/01/2011

NEW Partnership Service Coordinator ID: Mendel, Gene

Message from webpage: This form is read-only. KET assessments can only be entered / corrected from the Manage Active Partners screen.

6. You can select the **Print** button to print a copy of the KET form. When you are finished reviewing the information on the KET, select the **Cancel** button to return to the **DCR Home** webpage.

The **Quarterly Assessment(s) Due Table** displays all partners who currently have a 3M due. The table will display all partners who have an upcoming 3M due in 15 days or less while noting that the 3M is 0 days overdue. The table will also display all 3Ms which are overdue by less than 30 days. This table does not display partners with 3Ms who are overdue by more than 30 days.

### To Manage Partners with the Quarterly Assessment(s) Due Table:

1. Log into ITWS and access the FSP DCR application.
- ❖ Refer to [Chapter 3 “The Online System Interface”](#) at section [“Accessing the FSP DCR Application”](#) for details on accessing the FSP DCR application.
2. As seen in Figure 10-3.1, select the **Home** menu and the **DCR Home** submenu. (This is also the default webpage you will see at login.)
3. As seen in Figure 10-3.1, review the list of partners in the **Quarterly Assessment(s) Due Table**. Notice that there may be several pages of partners listed. You can navigate to the next page of the table by selecting the page

## Chapter 10: Managing Partners with the Online FSP DCR

number or the **Next** link or you can select the **View All** link in the upper right corner of the table to view a list of all partners with 3Ms currently due.

The table can also be sorted by any heading by simply clicking on the heading one time for ascending and twice for descending.

4. As seen in Figure 10-3.1, select a partner's name link to enter the 3M information for the 3M which is currently due. You cannot enter information for a 3M which is overdue by more than 30 days from this table.
- ❖ Refer to [Chapter 9 “Working with 3Ms”](#) at section [“Completing the 3M through the Online FSP DCR”](#) for instructions on completing a 3M which may be overdue by more than 30 days.

**Figure 10-3.1**

Department of Mental Health  
MHS Data Collection and Reporting

Home Partnerships Transfers Admin Help

Search for  
Last Name [Go]

DCR Home

Pending Partnership Assessment Form(s)

| Partner Name                    | C.S.I.CCN | County FSP ID | Age | Partnership Date | Assigned PSC |
|---------------------------------|-----------|---------------|-----|------------------|--------------|
| <a href="#">Avonlea, Anne</a>   |           |               | 80  | 5/30/2011        | Gene Mendel  |
| <a href="#">Bedella, Amelia</a> | 857845744 | RT4567861255  | 46  | 3/4/2011         | Joe Jenkins  |
| <a href="#">Inoalls, Laura</a>  |           |               | 69  | 6/2/2011         | Gene Mendel  |
| <a href="#">Joos, Jillian</a>   |           |               | 7   | 5/25/2011        | Mary Office  |
| <a href="#">Jones, June</a>     | 256689875 | 1555          | 19  | 7/1/2009         | Gene Mendel  |

1 2 Next Page 1 of 2

30 Day Key Event Notification(s)

| Partner Name                 | C.S.I.CCN | County FSP ID    | Age | Key Event Date | Reason                     | Total Days | Assigned PSC |
|------------------------------|-----------|------------------|-----|----------------|----------------------------|------------|--------------|
| <a href="#">Jenny, Jenny</a> | 455684456 | 564581104575664A | 12  | 6/30/2011      | State Psychiatric Hospital | 85         | Gene Mendel  |

Quarterly Assessment(s) Due

| Partner Name                    | C.S.I.CCN | County FSP ID | Age | Due Date  | Days Past Due | Assigned PSC |
|---------------------------------|-----------|---------------|-----|-----------|---------------|--------------|
| <a href="#">Avonlea, Anne</a>   |           |               | 80  | 8/30/2011 | 24            | Gene Mendel  |
| <a href="#">Bedella, Amelia</a> | 857845744 | RT4567861255  | 46  | 9/4/2011  | 19            | Joe Jenkins  |
| <a href="#">Inoalls, Laura</a>  |           |               | 69  | 9/2/2011  | 21            | Gene Mendel  |
| <a href="#">Joos, Jillian</a>   |           |               | 7   | 8/25/2011 | 29            | Mary Office  |
| <a href="#">Jones, June</a>     | 256689875 | 1555          | 19  | 10/1/2011 | 0             | Gene Mendel  |

1 2 Next Page 1 of 2

5. The next screen will display the 3M entry form. Complete the information for the 3M currently due.

- ❖ Refer to [Chapter 9 “Working with 3Ms”](#) at section [“Completing the 3M through the Online FSP DCR”](#) at instructions of “To Fill in 3M Form Fields through the Online FSP DCR Application” and continue from step 5 to complete the 3M form.

## Chapter 10: Managing Partners with the Online FSP DCR

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### Searching for Partners

One way to locate a partner is to use the searching function. On most webpages of the FSP DCR, a **Search for** box will appear on the left band of the screen. This **Search for** box is used to search for active partners on every webpage except for on two webpages.

- **FSP DCR Search for box searches active partners on every webpage except:**
  - On the **Partnerships** menu with the **Inactive Partners** submenu, the **Search for** box will search inactive partners only
  - On the **Admin** menu with the **Virtual PSCs** submenu, the **Search for** box will search for PSCs only

#### To Search for an Active Partner:

1. Log into ITWS and access the FSP DCR application.
- ❖ Refer to [Chapter 3 “The Online System Interface” at section “Accessing the FSP DCR Application”](#) for details on accessing the FSP DCR application.
2. As seen in Figure 10-4.1, most webpages will display a **Search for** box. Make sure you are on a webpage which displays the search box, but that you are not on the **Partnerships** menu with the **Inactive Partners** submenu or the **Admin** menu with the **Virtual PSCs** submenu webpage, as these will not search active partners.
3. As seen in Figure 10-4.1, select a searching option of either **Last Name** or **CCN / FSP** from the drop-down box, and enter the appropriate partner information for the active partner you wish to locate. Select the **Go** button.

**Figure 10-4.1**



## Chapter 10: Managing Partners with the Online FSP DCR

- The results of the search will provide a list of matching partners in the **Active Full Service Partners** webpage. Review the list for the partner of interest. As seen in Figure 10-4.2, selecting a partner's name will display the **Outcome Assessment for:** table for the selected partner. Select the **Clear Search** button to return to the full list of active partners.
- ❖ Refer to the [“Managing Active Partners Webpage”](#) section later in this chapter for further information on using this webpage to manage partner information.

**Figure 10-4.2**

The screenshot displays the 'Department of Mental Health MHS Data Collection and Reporting' interface. The main content area is titled 'ACTIVE Full Service Partners'. A search bar on the left contains 'RT4567861255' and a dropdown menu is set to 'CCN / FSP'. Below the search bar is a 'Manage Active Partners' button. The table below shows one partner: 'Bedelia, Amelia' with a 'Pending' status. Below the table, the 'Outcome Assessments for: Bedelia, Amelia' section is visible, containing links for 'View / Update Current KET Status', 'Enter New KET', and 'Validation Report'. The 'KEY EVENT TRACKING' and 'QUARTERLY ASSESSMENTS' sections are also present.

| Partner Name    | CSI CCN   | County FSP ID | Age | Partnership Date | Assigned PSC | PAF Status |
|-----------------|-----------|---------------|-----|------------------|--------------|------------|
| Bedelia, Amelia | 857845744 | RT4567861255  | 46  | 3/4/2011         | Joe Jenkins  | Pending    |

Outcomes Assessments for: Bedelia, Amelia

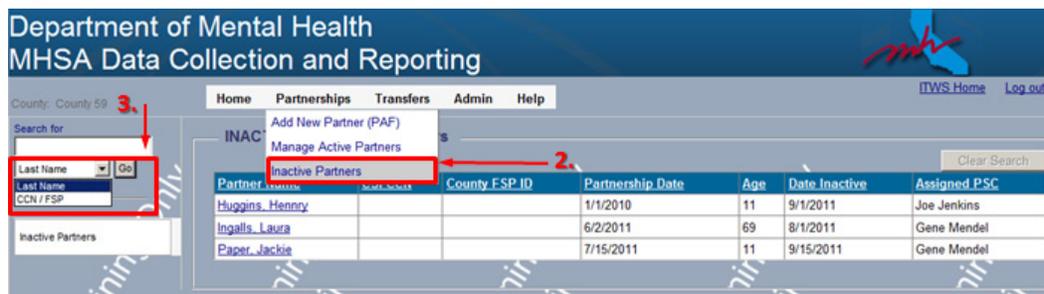
| PAF  | KEY EVENT TRACKING  | QUARTERLY ASSESSMENTS                   |                     |
|--|---|---|---------------------|
| 3/4/2011<br>(pending)<br>Validation Report | <a href="#">View / Update Current KET Status</a><br><a href="#">Enter New KET</a> | Currently Due:<br>8/4/2011              | Due Past Due:<br>19 |
|  | KET HISTORY<br>N/A  | QUARTERLY HISTORY<br>8/4/2011 (missing) |                     |

### To Search for an Inactive Partner:

- Log into ITWS and access the FSP DCR application.
- ❖ Refer to [Chapter 3 “The Online System Interface”](#) at section [“Accessing the FSP DCR Application”](#) for details on accessing the FSP DCR application.
- As seen in Figure 10-5.1, navigate to the **Partnerships** menu and **Inactive Partners** submenu to display the **Search for** box on that page.
  - As seen in Figure 10-5.1, select a searching option of either **Last Name** or **CCN / FSP** from the drop-down box, and enter the appropriate partner information for the inactive partner you wish to locate. Select the **Go** button.

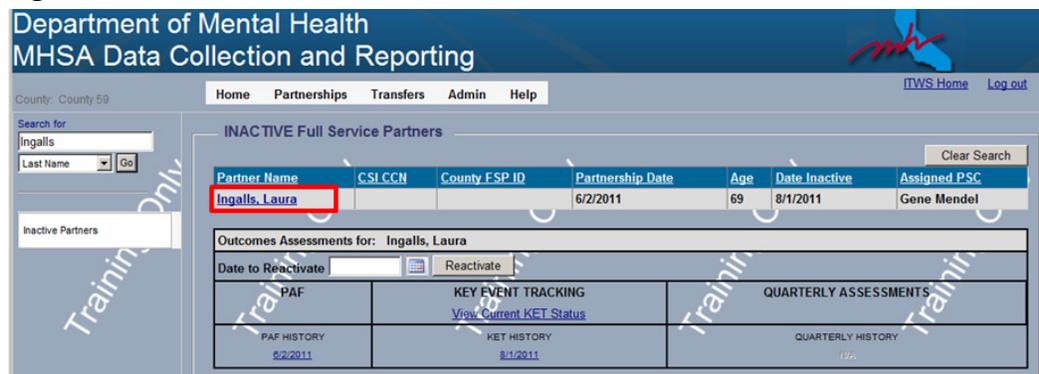
## Chapter 10: Managing Partners with the Online FSP DCR

Figure 10-5.1



- The results of the search will provide a list of matching partners in the **Inactive Full Service Partners** webpage. Review the list for the partner of interest. As seen in Figure 10-5.2, selecting a partner's name will display the **Outcome Assessment for:** table for the selected partner. Select the **Clear Search** button to return to the full list of inactive partners.
- ❖ Refer to the [“Managing Inactive Partners Webpage”](#) section later in this chapter for further information on using this webpage to manage inactive partner information.

Figure 10-5.2



### Managing Active Partners

After a partnership is established, the **ACTIVE Full Service Partners** webpage summarizes all of the PAF, KET and 3M assessments that have been created for a partner. There is also a link to view all of a partner's most current KET status information. It is also the place where changes can be made to the PAFs, KETs or 3Ms, and it is the place to create new KETs or 3Ms.



### To Manage Active Partners with the ACTIVE Full Service Partners Webpage:

1. Log into ITWS and access the FSP DCR application.
- ❖ Refer to [Chapter 3 “The Online System Interface” at section “Accessing the FSP DCR Application”](#) for details on accessing the FSP DCR application.
2. As seen in Figure 10-6.1, navigate to the **Partnerships** menu and **Manage Active Partners** submenu to display the list of active partners.
3. Locate the partner of interest in the list. You can search for an active partner with the **Search for** box. You can sort the list by any column heading by selecting it once for an ascending sort or twice for a descending sort. Through the **PAF Status** drop-down box, the webpage can display a list of active partners, deleted partners or all (deleted and undeleted active) partners. (The list of all partners will not include inactive partners.)
- ❖ Refer to [“Searching for Partners”](#) earlier in this chapter for details on searching for active partners.
4. As seen in Figure 10-6.1, selecting a partner’s name will display the **Outcome Assessment for:** table where all of the partner’s assessments are organized. By selecting on the date link in the appropriate sections of the table you can perform the following actions.
  - **Actions Performed from the ACTIVE Full Service Partners Webpage:**
    1. Print PAF Validation Report
    2. Certify a PAF is Complete
    3. Review / Correct / Update PAF Information
    4. Review / Correct / Update KET Information
    5. Review / Correct / Update 3M Information
    6. Add a New KET
    7. Complete the 3M Currently Due
    8. Complete a Missing 3M
    9. Discontinue a Partner
    10. Delete a Partner

## Chapter 10: Managing Partners with the Online FSP DCR

- ❖ Refer to [Chapter 11 “Data Correction”](#) for further information on correcting and updating PAF, KET and 3M data for active and inactive partners.
- ❖ Refer to [Chapter 8 “Working with KETs”](#) for further information on adding a new KET for a partner.
- ❖ Refer to [Chapter 9 “Working with 3Ms”](#) for further information on completing a 3M for a partner.
- ❖ Refer to [“Deleting, Discontinuing and Reactivating Partnerships”](#) later in this information for further information deleting and discontinuing active partners.

**Figure 10-6.1**

Department of Mental Health  
MHSA Data Collection and Reporting

Home Partnerships Transfers Admin Help

Search for: [Last Name] [Go]

ACT: Add New Partner (PAF) Manage Active Partners

| Partner Name    | CSLCCN    | County FSP ID    | Age | Partnership Date | Assigned PSC | PAF Status |
|-----------------|-----------|------------------|-----|------------------|--------------|------------|
| Bedelia, Amelia | 857845744 | RT4567861255     | 46  | 3/4/2011         | Joe Jenkins  | Pending    |
| Bobby, Bobby    |           |                  | 11  | 7/15/2011        | Gene Mendel  | Pending    |
| Jones, Junie    | 256689875 | 1555             | 19  | 7/1/2009         | Gene Mendel  | Pending    |
| Jenny, Jenny    | 455684456 | 564581104575664A | 12  | 1/5/2011         | Joe Jenkins  | Pending    |
| Mulligan, Mike  | 459293291 | AB39493049303    | 39  | 10/20/2009       | Mary Office  | Pending    |
| Paper, Jackie   |           |                  | 23  | 11/5/2009        | Mary Office  | Pending    |
| Quimby, Ramona  |           |                  | 55  | 10/3/2010        | Gene Mendel  | Pending    |

Outcomes Assessments for: Jenny, Jenny

| PAF  | KEY EVENT TRACKING  | QUARTERLY ASSESSMENTS                               |                     |
|--|---|---|---------------------|
| 1/5/2011<br>(pending)<br>Validation Report | <a href="#">View / Update Current KET Status</a><br><a href="#">Enter New KET</a> | Currently Due:<br>10/2/2011                         | Days Past Due:<br>0 |
|  | KET HISTORY<br>2/1/2011   | QUARTERLY HISTORY<br>7/5/2011<br>4/5/2011 (missing) |                     |

**Note:** Only the first five KET history dates will appear; in order to see more or all KETs, click “View All” at the end of the dates listed under KET History.

### To View an Active Partner’s Current KET Status:

1. Locate a partner at the **Manage Active Partners** site and click on the partner to display the **Outcome Assessments** table. Click the **View/Update Current KET Status** link under the **Key Event Tracking**.
- ❖ Refer to section [“Searching for Partners”](#) earlier in this chapter for instructions on locating an active partner.

## Chapter 10: Managing Partners with the Online FSP DCR

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**Note:** The user will not be able to make changes in the **View/Update Current KET Status** form; it is only a snapshot of the most recently updated KET information.

---

2. From here, the options are to **Enter KET**, **Print** or **Cancel**. Selecting **Print** will print the form from the window that opens in a printer friendly version. Selecting **Cancel** will take you back to the **Active Full Service Partners** screen. (A window will appear asking you if you are sure you want to cancel.) Lastly, selecting **Enter KET** will open the “Enter New Key Event Tracking” form.
3. You can see all of the partner’s information by clicking **Expand all Domains** while **Collapse all Domains** will hide the domain information.

**Note:** Under “Legal Issues / Designations” and then “Arrest Information” and then “Date Partner Arrested” only a single arrest will be displayed; so if the partner has been arrested multiple times, only the most recent arrest will appear, not the most recently submitted.

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### Certifying and Decertifying a PAF as Complete

When a PAF is completed in full, the FSP DCR automatically changes the PAF Status from “Pending” to “Complete”. In some cases, there is information for a partner which cannot be obtained, and this will prevent the FSP DCR from ever recognizing the PAF as complete. One example of this is when an FSP DCR partnership is established before the partner is registered with DMH as a CSI client. In this case, the FSP DCR will not recognize the CSI CCN number as valid, and the PAF will remain in “Pending” status even if the CSI CCN and all other information is complete. Once the client is registered in the CSI system, the information will be automatically updated in the FSP DCR. However, in cases where information will remain missing for the partner, the PAF status can be manually changed from “Pending” to “Certified” complete by a user with the CA-RW role. When a PAF status is set to “Certified” complete in the FSP DCR it appears as “Complete\*”. Any PAFs which have been certified as complete can also be decertified to return to “Pending” status by a user with the CA-RW role.



#### To Certify a PAF as Complete:

1. Log into ITWS and access the FSP DCR application.
- ❖ Refer to [Chapter 3 “The Online System Interface”](#) at section [“Accessing the FSP DCR Application”](#) for details on accessing the FSP DCR application.

## Chapter 10: Managing Partners with the Online FSP DCR

2. As seen in Figure 10-7.1, navigate to the **Partnerships** menu and **Manage Active Partners** submenu to display the list of active partners.
  3. Locate the partner of interest through the list or through a search.
- ❖ Refer to [“Managing Active Partners”](#) earlier in this chapter for details sorting the **ACTIVE Full Service Partners** table to locate a partner.
  - ❖ Refer to [“Searching for Partners”](#) earlier in this chapter for details on searching for active partners.
4. As seen in Figure 10-7.1, the **Pending** status will be a link if the user has the CA-RW role. Click on the **Pending** status link for the partner.
  5. As seen in Figure 10-7.1, enter a reason why the incomplete PAF is being certified as complete, and click the **Certify Complete** button.

**Figure 10-7.1**

The screenshot shows the Department of Mental Health MHS Data Collection and Reporting interface. The page title is "Department of Mental Health MHS Data Collection and Reporting". The navigation menu includes Home, Partnerships, Transfers, Reports, Admin, and Help. The current page is "ACTIVE Full Service Partners". The "PAF Status Filter" is set to "Pending & Complete". The table below shows the list of active partners:

| Partner Name                     | CSI CCN | County FSP ID | Age | Partnership Date | Assigned PSC | PAF Status              |
|----------------------------------|---------|---------------|-----|------------------|--------------|-------------------------|
| <a href="#">Duck, Daisy</a>      |         |               | 42  | 12/10/2007       | Lisa Simpson | <a href="#">Pending</a> |
| <a href="#">Flintstone, Fred</a> |         |               | 18  | 3/3/2008         | Lisa Simpson | <a href="#">Pending</a> |
| <a href="#">Mouse, Minnie</a>    |         |               | 46  | 2/21/2008        | Sac County   | <a href="#">Pending</a> |
| <a href="#">Simpson, Maggie</a>  |         |               | 83  | 12/10/2007       | Lisa Simpson | <a href="#">Pending</a> |

Below the table, there is a "Certify Complete Reason:" text area with a text input field and a "Certify Complete" button. A red box highlights the text area and the button. A red arrow points to the "Certify Complete" button. A red arrow also points to the "Pending" status link in the table.

6. The status of the partner in the **ACTIVE Full Service Partners** table will now be displayed as "Complete\*".

### To Decertify a PAF:

1. Log into ITWS and access the FSP DCR application.
- ❖ Refer to [Chapter 3 “The Online System Interface” at section “Accessing the FSP DCR Application”](#) for details on accessing the FSP DCR application.

## Chapter 10: Managing Partners with the Online FSP DCR

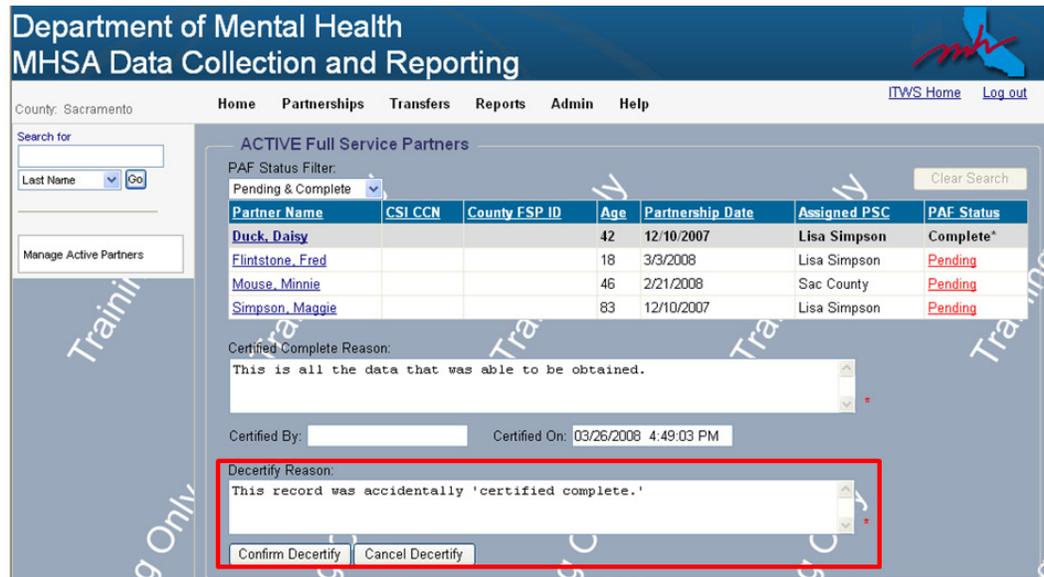
2. Navigate to the **Partnerships** menu and **Manage Active Partners** submenu to display the list of active partners.
  3. Locate the partner of interest through the list or through a search.
- ❖ Refer to [“Managing Active Partners”](#) earlier in this chapter for details sorting the **ACTIVE Full Service Partners** table to locate a partner.
  - ❖ Refer to [“Searching for Partners”](#) earlier in this chapter for details on searching for active partners.
4. As seen in Figure 10-8.1, select the name of the partner of interest in order to display the **Outcomes Assessments for:** table.
  5. As seen in Figure 10-8.1, click the **Decertify** button.

**Figure 10-8.1**

The screenshot displays the 'ACTIVE Full Service Partners' interface. On the left, there is a search box with 'Last Name' and a 'Go' button, and a 'Manage Active Partners' button. The main area shows a table of partners with columns: Partner Name, CSI CCN, County FSP ID, Age, Partnership Date, Assigned PSC, and PAF Status. The first row, 'Duck, Daisy', is highlighted with a red box. Below the table, the 'Outcomes Assessments for: Daisy Duck' section is visible, containing links for 'View / Update Current KET Status', 'Enter New KET', and 'Validation Report'. At the bottom, there is a 'Certified Complete Reason' field with the text 'This is all the data that was able to be obtained.', a 'Certified By' field, a 'Certified On' date of '03/26/2008 4:49:03 PM', and three buttons: 'Update Reason', 'Cancel Update', and 'Decertify'. The 'Decertify' button is highlighted with a red box and a red arrow labeled '5.'

6. As seen in Figure 10-8.2, enter the decertify reason, and click the **Confirm Decertify** button.

Figure 10-8.2



Department of Mental Health  
MHS Data Collection and Reporting

County: Sacramento Home Partnerships Transfers Reports Admin Help ITWS Home Log out

Search for  
Last Name Go

Manage Active Partners

ACTIVE Full Service Partners

PAF Status Filter:  
Pending & Complete Clear Search

| Partner Name                     | CSI CCN | County FSP ID | Age | Partnership Date | Assigned PSC | PAF Status |
|----------------------------------|---------|---------------|-----|------------------|--------------|------------|
| <a href="#">Duck, Daisy</a>      |         |               | 42  | 12/10/2007       | Lisa Simpson | Complete*  |
| <a href="#">Flintstone, Fred</a> |         |               | 18  | 3/3/2008         | Lisa Simpson | Pending    |
| <a href="#">Mouse, Minnie</a>    |         |               | 46  | 2/21/2008        | Sac County   | Pending    |
| <a href="#">Simpson, Maggie</a>  |         |               | 83  | 12/10/2007       | Lisa Simpson | Pending    |

Certified Complete Reason:  
This is all the data that was able to be obtained.

Certified By: Certified On: 03/26/2008 4:49:03 PM

Decertify Reason:  
This record was accidentally 'certified complete.'

Confirm Decertify Cancel Decertify

7. The status of the partner in the **ACTIVE Full Service Partners** table will now be displayed as “Pending”.

### Managing Inactive Partners

After a partnership is inactivated, the **INACTIVE Full Service Partners** webpage summarizes all of the PAF, KET and 3M assessments which were created for a partner during the last active partnership. This is also the place to reactivate a partner. No new KET assessments can be made while the partner is inactive, but missing 3Ms can be submitted and information in most existing KETs can be modified if required.

- ❖ Refer to [Chapter 11 “Data Correction”](#) for further information on correcting and updating PAF, KET and 3M data for inactive partners.



#### To Manage Inactive Partners with the **INACTIVE Full Service Partners** Webpage:

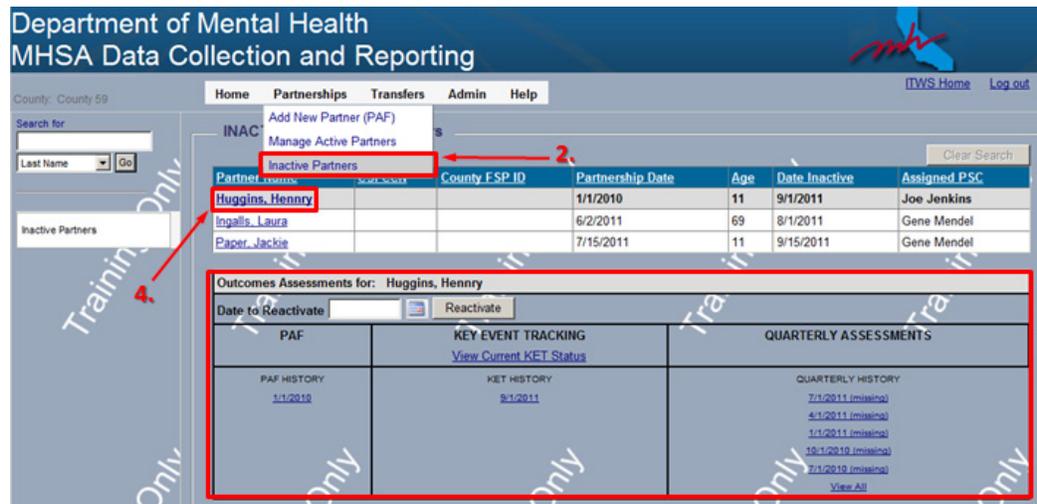
1. Log into ITWS and access the FSP DCR application.
- ❖ Refer to [Chapter 3 “The Online System Interface”](#) at section [“Accessing the FSP DCR Application”](#) for details on accessing the FSP DCR application.
2. As seen in Figure 10-9.1, navigate to the **Partnerships** menu and **Inactive Partners** submenu to display the list of inactive partners.

## Chapter 10: Managing Partners with the Online FSP DCR

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3. Locate the partner of interest in the list. You can search for an inactive partner with the **Search for** box. You can sort the list by any column heading by selecting it once for an ascending sort or twice for a descending sort.
- ❖ Refer to [“Searching for Partners”](#) earlier in this chapter for details on searching for inactive partners.
4. As seen in Figure 10-9.1, selecting a partner’s name will display the **Outcome Assessment for:** table where all of the partner’s assessments are organized. By entering a date in the **Date to Reactive** box and pressing the **Reactivate** button, you can reactivate the partner. By selecting on the date link in the appropriate sections of the table you can perform the following actions.
    - **Actions Performed from the INACTIVE Full Service Partners Webpage:**
      1. Print PAF Validation Report
      2. Review / Correct / Update PAF Information
      3. Review all KET Information / Correct some KET information
      4. Review / Correct / Update 3M Information
      5. Complete a Missing 3M
      6. Reactivate a Partner
- ❖ Refer to [Chapter 11 “Data Correction”](#) for further information on correcting and updating PAFs, 3Ms or KETs data for inactive partners.
  - ❖ Refer to [Chapter 9 “Working with 3Ms”](#) for further information on completing a 3M for a partner.
  - ❖ Refer to [“Deleting, Discontinuing and Reactivating Partnerships”](#) later in this chapter for further information on reactivating inactive partners.

Figure 10-9.1



### To View an Inactive Partner's Current KET Status:

1. Log into ITWS and access the FSP DCR application.
- ❖ Refer to [Chapter 3 "The Online System Interface"](#) at section ["Accessing the FSP DCR Application"](#) for details on accessing the FSP DCR application.
2. Navigate to the **Partnerships** menu and **Inactive Partners** submenu to display the list of inactive partners.
3. Locate a partner at the **Inactive Partners** webpage and click on a partner to display the **Outcome Assessments** table. Click **View Current KET Status** link under the **Key Event Tracking**.
- ❖ Refer to section ["Searching for Partners"](#) earlier in this chapter for instructions on locating a specific inactive partner.

**Note:** You will not be able to make changes in the **View/Update Current KET Status** frame; it is only a snapshot of the most recently updated KET information.

4. The options from here are to either **Cancel** or **Print**. Clicking **Cancel** will take you back to the **Active Full Service Partners** screen, and clicking **Print** will open a printer friendly version of the form to be printed.

## Chapter 10: Managing Partners with the Online FSP DCR

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5. You can see all of the partner's information by clicking the **Expand all Domains** link while **Collapse all Domains** will hide the domain information.

### Deleting, Discontinuing and Reactivating Partnerships

Partnerships can be deleted, discontinued and reactivated. After a partnership is established, a partnership which was added to the FSP DCR by mistake, in duplicate, or for a partner who never commenced the FSP program, etc., can be deleted from the FSP DCR. A partnership in which the partner participated in the FSP program for some time, but is no longer participating can be discontinued. After a partnership is discontinued, the partner is considered inactive and the partner will appear in the section of the FSP DCR for inactive partners. An inactive partner can be reactivated. If the partner has been inactive for less than a year, then the partner can be reactivated in connection with the original PAF submitted. If the partner has been inactive for more than a year, then the FSP DCR will prompt the user to submit a new PAF form in order to reactivate the partner.



#### To Delete a Partnership:

1. Log into ITWS and access the FSP DCR application.
- ❖ Refer to [Chapter 3 “The Online System Interface” at section “Accessing the FSP DCR Application”](#) for details on accessing the FSP DCR application.
2. Navigate to the **Partnerships** menu and **Manage Active Partners** submenu to display the list of active partners.
3. From the **ACTIVE Full Service Partners** table, select the partner of interest.
- ❖ Refer to [“Managing Active Partners”](#) earlier in this chapter for information on locating partners through the Active Full Service Partners Webpage.
4. As seen in Figure 10-10.1, select the date link under the **PAF** heading in the **Outcomes Assessment for:** table.

## Chapter 10: Managing Partners with the Online FSP DCR

Figure 10-10.1

Department of Mental Health  
MHS Data Collection and Reporting

County: County 59    Home   Partnerships   Transfers   Admin   Help    ITWS Home   Log out

Search for: [Last Name] [Go]    ACTIVE Full Service Partners    PAF Status Filter: Pending & Complete    Clear Search

| Partner Name                    | C.S.I.C.C.N. | County FSP ID    | Age | Partnership Date | Assigned PSC | PAF Status |
|---------------------------------|--------------|------------------|-----|------------------|--------------|------------|
| <a href="#">Avonlea, Anne</a>   |              |                  | 80  | 5/30/2011        | Gene Mendel  | Pending    |
| <a href="#">Redelia, Amelia</a> | 857845744    | RT4567861255     | 46  | 3/4/2011         | Joe Jenkins  | Pending    |
| <a href="#">Jiggs, Jillian</a>  |              |                  | 7   | 5/25/2011        | Mary Office  | Pending    |
| <a href="#">Jones, Junie</a>    | 256689875    | 1555             | 19  | 7/1/2009         | Gene Mendel  | Pending    |
| <a href="#">Jenny, Jenny</a>    | 455684456    | 564581104575664A | 12  | 1/5/2011         | Gene Mendel  | Pending    |
| <a href="#">Mulligan, Mike</a>  | 459293291    | AB39493049303    | 39  | 10/20/2009       | Mary Office  | Pending    |
| <a href="#">Quimby, Ramona</a>  |              |                  | 55  | 10/3/2010        | Gene Mendel  | Pending    |

Outcomes Assessments for: Avonlea, Anne

| PAF  | KEY EVENT TRACKING  | QUARTERLY ASSESSMENTS   |
|--|---|---|
| <a href="#">5/30/2011</a><br><small>(pending)</small><br><a href="#">Validation Report</a> | <a href="#">View / Update Current KET Status</a><br><a href="#">Enter New KET</a> | Currently Due: <a href="#">8/30/2011</a><br>Days Past Due: 24 |
|  | KET HISTORY   | QUARTERLY HISTORY   |

5. As seen in Figure 10-10.2, the PAF form will be displayed. Scroll to the bottom of the form, and select the **Delete** button.
6. As seen in Figure 10-10.2, enter a reason for deleting the partnership in the **Delete Reason** box. The delete reason is a required field to delete a partnership.
7. As seen in Figure 10-10.2, select the **Confirm Delete** button.
8. As seen in Figure 10-10.2, in the popup box that appears, select the **OK** button to confirm you want to delete the partnership.

**Note:** After the partnership is deleted, the partner's information will be available for viewing in the **ACTIVE Full Service Partners** webpage when the **PAF Status Filter** drop-down box is set to **Deleted**. The partnership information cannot be changed, and the partnership cannot be reactivated at any time.

Figure 10-10.2

Partner's Last Name: Avonlea  
Partnership Date (mm/dd/yyyy): 05/30/2011  
Partner's Date of Birth (mm/dd/yyyy): 06/05/1931

Who referred the partner? (mark one)

Self  
 Family Member (e.g., parent, guardian, sibling, aunt, uncle, child)  
 Significant Other (e.g., boyfriend / girlfriend, spouse)  
 Friend / Neighbor (i.e., unrelated other)  
 School  
 Primary Care / Medical Office

Emergency Room  
 Mental Health Facility / Community Agency  
 Social Services Agency  
 Substance Abuse Treatment Facility / Agency  
 Faith-based Organization  
 Other County / Community Agency

Homeless Shelter  
 Street Outreach  
 Jail / Prison  
 Acute Psychiatric / State Hospital  
 Other

ADMINISTRATIVE INFORMATION  
RESIDENTIAL INFORMATION - includes hospitalization and incarceration  
EDUCATION  
EMPLOYMENT  
SOURCES OF FINANCIAL SUPPORT  
LEGAL ISSUES / DESIGNATIONS  
EMERGENCY INTERVENTION  
HEALTH STATUS  
SUBSTANCE ABUSE  
INDEX OF INDEPENDENT ACTIVITIES OF DAILY LIVING (ADL)  
INSTRUMENTAL ACTIVITIES OF DAILY LIVING (IADL)  
COUNTY USE QUESTIONS

Submit Cancel Print **Delete**

Delete Reason:  
Partner added in duplicate.

**Confirm Delete** Cancel Delete

Message from webpage  
You are about to delete this PAF and all related partnership KETs and 3Ps.  
Are you sure you want to delete this partner?  
**OK** Cancel

Expand all Domain

Partners who no longer participate in the FSP, for a variety of reasons, can be discontinued from the partnership. However, their information will remain in the system as an inactive partner. If the partner returns to the program, the partner can be reactivated at any point in the future. A KET is used to discontinue a partner. However, no other information about the partner should be entered on the same KET which is used for the partnership status change (i.e., discontinuation or reactivation). A KET which contains a partnership status change cannot be edited or deleted at any point. Therefore, other information about the partnership should be submitted in a separate KET from the partnership status change in order to reserve the ability to update or correct the information at a future point.

### To Inactivate a Partnership (i.e., Discontinue Partnership):

1. Log into ITWS and access the FSP DCR application.
- ❖ Refer to [Chapter 3 “The Online System Interface”](#) at section [“Accessing the FSP DCR Application”](#) for details on accessing the FSP DCR application.
2. Navigate to the **Partnerships** menu and **Manage Active Partners** submenu to display the list of active partners.
3. In the **ACTIVE Full Service Partners** table, select the partner of interest.

## Chapter 10: Managing Partners with the Online FSP DCR

- ❖ Refer to [“Managing Active Partners”](#) earlier in this chapter for information on locating partners through the **ACTIVE Full Service Partners** Webpage.
4. As seen in Figure 10-11.1, select **Enter New KET** under the **KEY EVENT TRACKING** heading in the **Outcomes Assessment for:** table.

Figure 10-11.1

Department of Mental Health  
MHS Data Collection and Reporting

County: County 59

Home Partnerships Transfers Admin Help

ACTIVE Full Service Partners

PAF Status Filter: Pending & Complete

| Partner Name    | CSLCCN    | County FSP ID    | Age | Partnership Date | Assigned PSC | PAF Status |
|-----------------|-----------|------------------|-----|------------------|--------------|------------|
| Avonlea, Anne   |           |                  | 80  | 5/30/2011        | Gene Mendel  | Pending    |
| Redelia, Amelia | 857845744 | RT4567861255     | 46  | 3/4/2011         | Joe Jenkins  | Pending    |
| Jiggs, Jillian  |           |                  | 7   | 5/25/2011        | Mary Office  | Pending    |
| Jones, Junie    | 256689875 | 1555             | 19  | 7/1/2009         | Gene Mendel  | Pending    |
| Jenny, Jenny    | 455684456 | 564581104575664A | 12  | 1/5/2011         | Gene Mendel  | Pending    |
| Mulligan, Mike  | 459293291 | AB39493049303    | 39  | 10/20/2009       | Mary Office  | Pending    |
| Quimby, Ramona  |           |                  | 55  | 10/3/2010        | Gene Mendel  | Pending    |

Outcomes Assessments for: Avonlea, Anne

| PAF   | KEY EVENT TRACKING  | QUARTERLY ASSESSMENTS       |                      |
|---|---|-----------------------------|----------------------|
| 5/30/2011<br>(pending)<br>Validation Report | <a href="#">View / Update Current KET Status</a><br><a href="#">Enter New KET</a> | Currently Due:<br>8/30/2011 | Days Past Due:<br>24 |
|   | KET HISTORY   | QUARTERLY HISTORY           |                      |

5. As seen in Figure 10-11.2, a KET form will be displayed. Enter the date the partnership ended in the **Date of Partnership Status Change (mm/dd/yyyy)**: box.
6. As seen in Figure 10-11.2, select the **Discontinuation / Interruption of Full Service Partnership and / or community services / program (indicate reason below)** radio option.
7. As seen in Figure 10-11.2, select the discontinuation reason.
8. As seen in Figure 10-11.2, select the Submit button. There is no final confirmation popup box; so be sure that you would like to discontinue the partner before submitting the KET.

## Chapter 10: Managing Partners with the Online FSP DCR

**Note:** *The following note is very important.* Other relevant key event dates and information should not be entered on the same KET as the discontinuation. All other events and information about the partner, who is about to be discontinued, should be entered on separate KET prior to submitting the KET for the discontinuation. Once the partner is discontinued, the partner becomes inactive and no new KETs can be made for the partner while the partner is inactive.

**Figure 10-11.2**

The screenshot shows a web form for discontinuing a partnership. The form includes the following elements:

- Date of Partnership Status Change (mm/dd/yyyy):** A text box containing "7/31/2011", highlighted with a red box and labeled "3." with an arrow.
- Indicate NEW partnership status:** A section with two radio button options:
  - Discontinuation / Interruption of Full Service Partnership and / or community services / program (indicate reason below) - highlighted with a red box and labeled "4." with an arrow.
  - Reestablishment of Full Service Partnership and / or community services / program
- If there is a DISCONTINUATION / INTERRUPTION of Full Service Partnership and / or community services / program, indicate the reason (mark one):** A list of radio button options:
  - Target population criteria are not met.
  - Partner decided to discontinue Full Service Partnership participation after partnership established.
  - Partner moved to another county / service area.
  - After repeated attempts to contact partner, s/he cannot be located.
  - Community services / program interrupted – Partner’s circumstances reflect a need for residential / institutional mental health services at this time (such as State Hospital).
  - Community services / program interrupted – Partner will be placed in JUVENILE HALL / CAMP / RANCH.
  - Community services / program interrupted – Partner will be placed in DIVISION of JUVENILE JUSTICE.
  - Partner has successfully met his / her goals such that discontinuation of Full Service Partnership is appropriate.
  - Partner is deceased.
- RESIDENTIAL INFORMATION - includes hospitalization and incarceration (Skip this section if there are no changes)**
- EDUCATION (Skip this section if there are no changes)**
- EMPLOYMENT (Skip this section if there are no changes)**
- LEGAL ISSUES / DESIGNATIONS (Skip this section if there are no changes)**
- EMERGENCY INTERVENTION (Skip this section if there are no changes)**
- COUNTY USE QUESTIONS (Skip this section if there are no changes)**
- Buttons:** "Submit", "Cancel", and "Print". The "Submit" button is highlighted with a red box and labeled "6." with an arrow.
- Expand all Domain:** A link located at the bottom right of the form, labeled "5." with an arrow.

### To Reactivate a Partnership:

1. Log into ITWS and access the FSP DCR application.
- ❖ Refer to [Chapter 3 “The Online System Interface”](#) at section [“Accessing the FSP DCR Application”](#) for details on accessing the FSP DCR application.
2. Navigate to the **Partnerships** menu and **Inactive Partners** submenu to display the list of inactive partners.
3. From the **INACTIVE Full Service Partners** table, select the partner of interest.

## Chapter 10: Managing Partners with the Online FSP DCR

- ❖ Refer to [“Managing Inactive Partners”](#) earlier in this chapter for information on locating partners through the **INACTIVE Full Service Partners** table.
4. As seen in Figure 10-12.1, enter the date the partner was reactivated in the **Date to Reactivate** box and select the **Reactivate** button.

**Figure 10-12.1**

The screenshot shows the Department of Mental Health MHSR Data Collection and Reporting interface. The main content area displays the 'INACTIVE Full Service Partners' table. Below the table, there is a section for 'Outcomes Assessments for: Jiggs, Jillian'. A red box highlights the 'Date to Reactivate' field, which contains the date 9/20/2011, and the 'Reactivate' button next to it.

| Partner Name                   | CSI/CCN | County FSP ID | Partnership Date | Age | Date Inactive | Assigned PSC |
|--------------------------------|---------|---------------|------------------|-----|---------------|--------------|
| <a href="#">Huggins, Henry</a> |         |               | 1/1/2010         | 11  | 9/1/2011      | Joe Jenkins  |
| <a href="#">Ingalls, Laura</a> |         |               | 6/2/2011         | 69  | 8/1/2011      | Gene Mendel  |
| <a href="#">Jiggs, Jillian</a> |         |               | 5/25/2011        | 7   | 7/31/2011     | Mary Office  |
| <a href="#">Paper, Jackie</a>  |         |               | 7/15/2011        | 11  | 9/15/2011     | Gene Mendel  |

Outcomes Assessments for: Jiggs, Jillian

Date to Reactivate: 9/20/2011

| PAF                      | KEY EVENT TRACKING                                  | QUARTERLY ASSESSMENTS    |
|--------------------------|---|--------------------------|
| PAF HISTORY<br>5/25/2011 | View Current KET Status<br>KET HISTORY<br>7/31/2011 | QUARTERLY HISTORY<br>0/0 |

5. As seen in Figure 10-12.2, if the reactivation date was within a year after the discontinuation date, a screen is displayed to confirm the partnership was reactivated. It is required that all key event changes which occurred while the partnership was inactive be entered into the FSP DCR via the KETs.
- ❖ Refer to [Chapter 8 “Working with KETs”](#) for further information on adding a new KET for a partner.

If the gap in partnership was greater than a year, then the FSP DCR will open a new PAF form with the partnership information entered for the partner. All other parts of the new PAF need to be completed with updated information for the partner. The PAF must be submitted for the partner to be reactivated.

- ❖ Refer to [Chapter 7 “Establishing Partners”](#) for further information on establishing a new partnership.

**Figure 10-12.2**



### Sharing Partner Information

It may be necessary to temporarily “share” the access to the partner’s information in the event that the FSP DCR user who normally manages the partner’s data will be unavailable (e.g., on leave, vacation or another assignment, etc.). In order for a FSP DCR user to have the ability to share a partner’s data with another group of FSP DCR users, the user must be assigned the SFG role.

- ❖ Refer to [Chapter 5 “Managing DCR Users” at section “Assigning and Removing Roles for FSP DCR Users”](#) for details on assigning a SFG role to an enrolled FSP DCR user.

When a user has been assigned the SFG role, the user can share a partner’s information with another group of FSP DCR users. Sharing is performed on an individual partner basis, and the action of sharing must be repeated for all partners who will need to be shared.

- ❖ Refer to [Chapter 5 “Managing DCR Users” at section “Data Security and Data Sharing between Users”](#) for further information on sharing a partner’s information with another group.

### Chapter 11: Data Correction

Missing data can be added or aberrant data can be corrected in the FSP DCR. Users can overwrite existing information on a partner's PAF, KETs or 3Ms through the online FSP DCR or via XML batch upload. KETs and 3Ms cannot be deleted, but all incorrect information for the assessments can be cleared such that no aberrant data remains in the database.

---

**Note:** While the FSP DCR will allow correcting or clearing aberrant data, DMH advises against clearing all fields in an assessment as this results in inefficient use of the system. In this case, DMH recommends that the entire partnership be deleted and recreated such that all assessments are reentered with correct data in the FSP DCR. Regardless of the method a county chooses to correct its data, the highest priority is for correct and complete data in the FSP DCR.

---

Some fields cannot be updated on the online forms, and there are no visual indications in the online FSP DCR for which fields can or cannot be updated. To test if a field can be updated from the form you are on in the online FSP DCR, use your keyboard's **Delete** button. Do not use the **Backspace** button.

---

**Note:** Clicking on a field which cannot be updated on a form and attempting to use the backspace button will cause a webpage error of "Webpage has expired" and all unsaved changes will be lost. If this happens, using your browser's "back" button will return you to the FSP DCR application.

---

#### Correcting, Updating and Deleting a PAF with the Online FSP DCR

False information on the PAF can be corrected, and missing information on a PAF can be updated for active or inactive partners. However, a partner can only have one PAF at a time for a partnership, and deleting the PAF will delete the entire partnership.

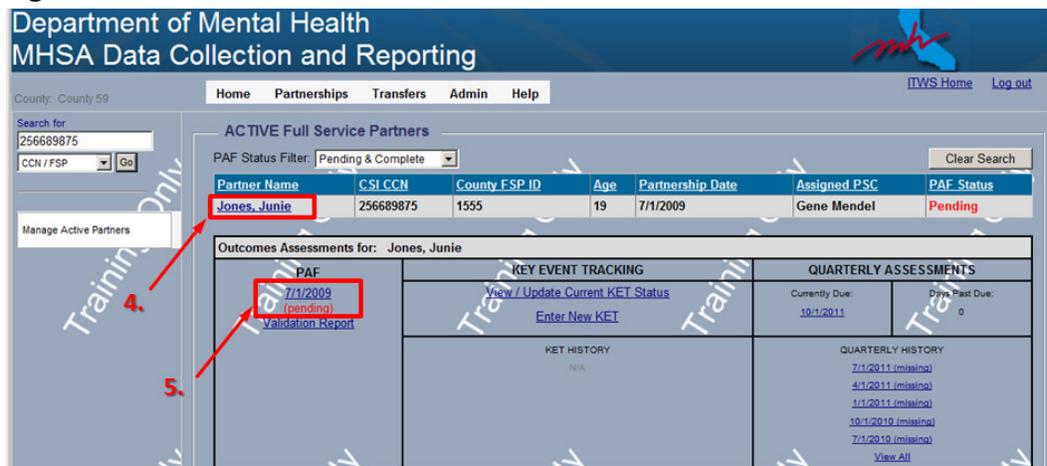
- ❖ Refer to [Chapter 10 "Managing Partners with the Online FSP DCR" at the section "Deleting, Discontinuing and Reactivating Partnerships"](#) for further information on deleting a PAF.

## Chapter 11: Data Correction

### To Correct or Update a PAF for an Active Partner:

1. Log into ITWS and access the FSP DCR application.
- ❖ Refer to [Chapter 3 “The Online System Interface”](#) at section [“Accessing the FSP DCR Application”](#) for details on accessing the FSP DCR application.
2. Navigate to the **Partnerships** menu and **Manage Active Partners** submenu to display the list of active partners.
3. Locate the partner of interest through the list or through a search.
- ❖ Refer to [Chapter 10 “Managing Partners with the Online FSP DCR”](#) at the section of [“Managing Active Partners”](#) for details sorting the **ACTIVE Full Service Partners** table to locate a partner.
- ❖ Refer to [Chapter 10 “Managing Partners with the Online FSP DCR”](#) at the section of [“Searching for Partners”](#) for details on searching for active partners.
4. As seen in Figure 11-1.1, select the partner’s name to display the **Outcomes Assessments for:** table.
5. As seen in Figure 11-1.1, select the PAF date link under the **PAF** heading, and you will be returned to the PAF.

**Figure 11-1.1**



Department of Mental Health  
MHS Data Collection and Reporting

County: County 59    Home    Partnerships    Transfers    Admin    Help    ITWS Home    Log out

Search for: 256689875  
CCN / FSP    Go

Manage Active Partners

**ACTIVE Full Service Partners**  
PAF Status Filter: Pending & Complete    Clear Search

| Partner Name | CSLCCN    | County FSP ID | Age | Partnership Date | Assigned PSC | PAF Status |
|--------------|-----------|---------------|-----|------------------|--------------|------------|
| Jones, Junie | 256689875 | 1555          | 19  | 7/1/2009         | Gene Mendel  | Pending    |

Outcomes Assessments for: Jones, Junie

| PAF                                  | KEY EVENT TRACKING   | QUARTERLY ASSESSMENTS  |
|--------------------------------------|--|--|
| 7/1/2009 (pending) Validation Report | <a href="#">New / Update Current KET Status</a><br><a href="#">Enter New KET</a> | Currently Due: 10/1/2011<br>Days Past Due: 0   |
|                                      | KET HISTORY<br>N/A   | QUARTERLY HISTORY<br>7/1/2011 (missing)<br>4/1/2011 (missing)<br>1/1/2011 (missing)<br>10/1/2010 (missing)<br>7/1/2010 (missing)<br><a href="#">View All</a> |

6. Find the fields in the PAF with incorrect data and correct the data by selecting the field and deleting the current information and replacing it with new

## Chapter 11: Data Correction

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information or by selecting a different radio button. Find the fields missing data and update the fields with new data.

---

**Note:** The partnership date cannot be updated on the PAF. However, other partnership information & administrative data fields can be corrected or updated in the PAF. The corrections and updates on some administrative fields will immediately be present throughout all KETs and 3M assessments as well.

---

❖ Refer to [Chapter 2 “Introduction to the FSP DCR” at section “FSP DCR Data Hierarchy”](#) for a complete list of all partnership information & administrative data fields which will be automatically update through all KETs and 3Ms when corrected on the PAF.

---

**Note:** When correcting a partner’s birth date on the PAF, the age group for the partner at the time the partnership was established could change. If a correction to the birth date results in a change of age group at the time of the partnership, the PAF form will not update to the appropriate PAF type to accommodate the change. Therefore, in this case, the partnership should be deleted and recreated in the FSP DCR. If the change to the birth date does not change the age group for the partner for any assessments already entered into the FSP DCR, then proceed with changing the birth date. A menu will appear when changing the birth date “You are about to change the Date of Birth for this partner. Are you sure you want to proceed?” Click “Ok” to continue or “Cancel” to keep the date as it was.

---

7. Once all fields have been updated, click the **Submit** button. A menu will appear, “You are about to overwrite an existing assessment. Do you want to continue?” Click **Ok**. The updated information will be stored.

False information on the PAF can be corrected, and missing information on a PAF can be updated for inactive partners as well.



### To Correct or Update a PAF for an Inactive Partner:

1. Log into ITWS and access the FSP DCR application.
- ❖ Refer to [Chapter 3 “The Online System Interface” at section “Accessing the FSP DCR Application”](#) for details on accessing the FSP DCR application.

## Chapter 11: Data Correction

2. Navigate to the **Partnerships** menu and **Inactive Partners** submenu to display the list of inactive partners.
  3. Locate the partner of interest through the list or through a search.
- ❖ Refer to [Chapter 10 “Managing Partners with the Online FSP DCR” at the section of “Managing Inactive Partners”](#) for details on the **INACTIVE Full Service Partners** table.
  - ❖ Refer to [Chapter 10 “Managing Partners with the Online FSP DCR” at the section of “Searching for Partners”](#) for details on searching for inactive partners.
4. As seen in Figure 11-2.1, select the partner’s name to display the **Outcomes Assessments for:** table.
  5. As seen in Figure 11-2.1, select the PAF date link under the **PAF History** heading, and you will be returned to the PAF.

**Figure 11-2.1**

Department of Mental Health  
MHS Data Collection and Reporting

County: County 59

Home Partnerships Transfers Admin Help

Search for: [Last Name] Go

INAC Add New Partner (PAF)  
Manage Active Partners  
Inactive Partners

| Partner        | County FSP ID | Partnership Date | Age | Date Inactive | Assigned PSC |
|----------------|---------------|------------------|-----|---------------|--------------|
| Huggins, Henry |               | 1/1/2010         | 11  | 9/1/2011      | Joe Jenkins  |
| Ingalls, Laura |               | 6/2/2011         | 69  | 8/1/2011      | Gene Mendel  |
| Paper, Jackie  |               | 7/15/2011        | 11  | 9/15/2011     | Gene Mendel  |

Outcomes Assessments for: Huggins, Henry

Date to Reactivate: [ ] Reactivate

| PAF                     | KEY EVENT TRACKING                                 | QUARTERLY ASSESSMENTS  |
|-------------------------|--|--|
| PAF HISTORY<br>11/29/10 | View Current KET Status<br>KET HISTORY<br>8/1/2011 | QUARTERLY HISTORY<br>7/1/2011 (missing)<br>4/1/2011 (missing)<br>1/1/2011 (missing)<br>10/1/2010 (missing)<br>7/1/2010 (missing)<br>View All |

6. Continue by following the instructions at step 6 – 7 “To Correct or Update a PAF for an Active Partner” listed previously in this chapter.

### Correcting, Updating and Deleting a KET with the Online FSP DCR

False information on KETs\*\* can be corrected and missing information on KETs\*\* can be updated for active and inactive partners. KETs cannot be deleted at this time with the FSP DCR, but all incorrect information in a KET\*\* can be cleared.

## Chapter 11: Data Correction

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**KET\*\*** This only applies to KETs which do not contain a partnership status change (i.e., discontinuation or reestablishment). KETs which contain a discontinuation or reestablishment cannot be updated, changed or deleted at any time.

---



### To Correct or Update a KET\*\* for an Active Partner:

1. Log into ITWS and access the FSP DCR application.
- ❖ Refer to [Chapter 3 “The Online System Interface” at section “Accessing the FSP DCR Application”](#) for details on accessing the FSP DCR application.
2. Navigate to the **Partnerships** menu and **Manage Active Partners** submenu to display the list of active partners.
3. Locate the partner of interest through the list or through a search.
- ❖ Refer to [Chapter 10 “Managing Partners with the Online FSP DCR” at the section of “Managing Active Partners”](#) for details on the **ACTIVE Full Service Partners** table.
- ❖ Refer to [Chapter 10 “Managing Partners with the Online FSP DCR” at the section of “Searching for Partners”](#) for details on searching for active partners.
4. As seen in Figure 11-3.1, select the partner’s name to display the **Outcomes Assessments for:** table.
5. As seen in Figure 11-3.1, select a KET\*\* date link under the **KET History** heading, and you will be returned to the KET\*\*.

## Chapter 11: Data Correction

Figure 11-3.1

Department of Mental Health  
MHS Data Collection and Reporting

County: County 59

Home Partnerships Transfers Admin Help

Search for: [Last Name] [Go]

ACT: Add New Partner (PAF) Manage Active Partners

PAF Status: Inactive Partners

| Partner Name    | CSI/CCN   | County ESP ID    | Age | Partnership Date | Assigned PSC | PAF Status |
|-----------------|-----------|------------------|-----|------------------|--------------|------------|
| Bedelia, Amelia | 857845744 | RT4567861255     | 46  | 3/4/2011         | Joe Jenkins  | Pending    |
| Bobby, Bobby    |           |                  | 11  | 7/15/2011        | Gene Mendel  | Pending    |
| Jones, Junie    | 256689875 | 1555             | 19  | 7/1/2009         | Gene Mendel  | Pending    |
| Jenny, Jenny    | 455684456 | 564581104575664A | 12  | 1/5/2011         | Joe Jenkins  | Pending    |
| Mulligan, Mike  | 459293291 | AB39493049303    | 39  | 10/20/2009       | Mary Office  | Pending    |
| Paper, Jackie   |           |                  | 23  | 11/5/2009        | Mary Office  | Pending    |
| Quimby, Ramona  |           |                  | 55  | 10/3/2010        | Gene Mendel  | Pending    |

Outcomes Assessments for: Jenny, Jenny

| PAF                                     | KEY EVENT TRACKING  | QUARTERLY ASSESSMENTS                             |                  |
|---|---|---|------------------|
| 1/5/2011 (pending)<br>Validation Report | <a href="#">View / Update Current KET Status</a><br><a href="#">Enter New KET</a> | Currently Due: 10/5/2011                          | Days Past Due: 0 |
|   | KET HISTORY: 8/1/2011   | QUARTERLY HISTORY: 7/5/2011<br>4/5/2011 (missing) |                  |

6. Find the fields in the KET\*\* with incorrect data and correct the data by selecting the field and deleting the current information and replacing it with new information or by selecting a different radio button. Find the fields missing data and update the field with new data.

**Note:** The partner information, such as partner name and birth date, cannot be updated on the KET. However, partner information can be corrected or updated in the PAF, and changes in the PAF will then be displayed throughout all current or new KETs and 3Ms.

- ❖ Refer to [Chapter 2 “Introduction to the FSP DCR”](#) at section [“FSP DCR Data Hierarchy”](#) for a complete list of all partner information & administrative data fields which will be automatically updated through all KETs and 3Ms when corrected on the PAF.

**Note:** The **Partnership Status** cannot be updated or corrected in an existing KET. In order to discontinue or reestablish a partner you must begin a new KET.

- ❖ Refer to [Chapter 10 “Managing Partners with the Online FSP DCR”](#) at section [“Deleting, Discontinuing and Reactivating Partnerships”](#) for further information on discontinuing and reestablishing partnerships.

## Chapter 11: Data Correction

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7. Once all fields have been updated, click the **Submit** button. A menu will appear, “You are about to overwrite an existing assessment. Do you want to continue?” Click **Ok**. The updated information will be stored.

There are occasions where it might be necessary to clear all incorrect information from a KET\*\*. (For example, it is noticed that a KET\*\* was entered and applied to the wrong partner; or one arrest for the same date was submitted on two different KETs for the same partner.) KET assessments cannot be deleted in entirety in the FSP DCR at this time. However, all of the incorrect information in the KET\*\* can be cleared.



### To Clear all Incorrect Information in a KET\*\* for an Active Partner:

1. Follow steps 1 – 5 for “To Correct or Update a KET for an Active Partner” instructions listed previously in this chapter.
2. As seen in figure 11.4.1, with the KET\*\* form open with incorrect data to be cleared, click the **Expand All Domains** link to display the form in its entirety.
3. As seen in figure 11.4.1, scroll through the form, and at the beginning of each domain, select the **Clear Domain** link, as necessary. The fields for the domain will be set to blank and all radio selection buttons will become unselected.

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**Note:** Remember, no information on a KET with a partnership status change (discontinuation or reestablishment) can be changed in any way at any time.

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4. As seen in figure 11.4.1, a message will appear asking if you are sure you want to clear all of the values. Select **OK**.

## Chapter 11: Data Correction

Figure 11-4.1

The screenshot shows a web form titled "Update Existing KET". The form is divided into several sections:

- PARTNERSHIP INFORMATION:** Contains fields for County (59), CSI County Client Number (CCN) (000009999), County Partner ID (optional) (9999), Partner's First Name (Harry), Partner's Last Name (Potter), Date Completed (mm/dd/yyyy) (10/31/2011), and Partner's Date of Birth (mm/dd/yyyy) (10/03/1995).
- CHANGE IN ADMINISTRATIVE INFORMATION:** (Skip this section if there are no changes). This section is partially obscured by a dialog box.
- PARTNERSHIP STATUS:** Contains fields for Date of Provider Number / NPI Change (mm/dd/yyyy), NEW Provider Number / NPI, Date of Full Service Partnership Program ID Change (mm/dd/yyyy), NEW Full Service Partnership Program ID, Date of Partnership Service Coordinator ID Change (mm/dd/yyyy), and NEW Partnership Service Coordinator ID (Please Select One).

A "Message from webpage" dialog box is open, asking: "Are you sure you want to clear all the values in CHANGE IN ADMINISTRATIVE INFORMATION?". The dialog box has "OK" and "Cancel" buttons. Red arrows and boxes highlight the "Expand all Domains" button (2), the "Clear Domain" button (3), and the "OK" button in the message box (4).

5. Repeat steps 3 and 4 until all of the incorrect data in KET\*\* form is cleared, except for the **Partnership Information** (which can only be changed on the PAF).
6. Click the **Submit** button to resubmit the KET\*\* with cleared information to overwrite the existing KET form.
7. A message box will appear asking if you are sure you would like to overwrite the existing assessment. Click **OK**.

Information on KETs\*\* can be updated for inactive partners as well. Like active partners, the information for the partnership status cannot be updated on existing KETs.



### To Correct or Update a KET\*\* for an Inactive Partner:

1. Log into ITWS and access the FSP DCR application.
- ❖ Refer to [Chapter 3 "The Online System Interface" at section "Accessing the FSP DCR Application"](#) for details on accessing the FSP DCR application.
2. Navigate to the **Partnerships** menu and **Inactive Partners** submenu to display the list of inactive partners.
3. Locate the partner of interest through the list or through a search.

## Chapter 11: Data Correction

- ❖ Refer to [Chapter 10 “Managing Partners with the Online FSP DCR”](#) at the section of [“Managing Inactive Partners”](#) for details on the **INACTIVE Full Service Partners** table.
  - ❖ Refer to [Chapter 10 “Managing Partners with the Online FSP DCR”](#) at the section of [“Searching for Partners”](#) for details on searching for inactive partners.
4. As seen in Figure 11-5.1, select the partner’s name to display the **Outcomes Assessments for:** table.
  5. As seen in Figure 11-5.1, select the KET\*\* date link under the **KET History** heading, and you will be returned to the KET\*\*.

**Figure 11-5.1**

Department of Mental Health  
MHS Data Collection and Reporting

County: County 59

Home Partnerships Transfers Admin Help

Search for: [Last Name] [Go]

INAC

Add New Partner (PAF)  
Manage Active Partners  
Inactive Partners

| Partner        | County ESP ID | Partnership Date | Age | Date Inactive | Assigned PSC |
|----------------|---------------|------------------|-----|---------------|--------------|
| Huggins, Henry |               | 1/1/2010         | 11  | 9/1/2011      | Joe Jenkins  |
| Ingalls, Laura |               | 6/2/2011         | 69  | 8/1/2011      | Gene Mendel  |
| Paper, Jackie  |               | 7/15/2011        | 11  | 9/15/2011     | Gene Mendel  |

Outcomes Assessments for: Huggins, Henry

Date to Reactivate: [ ] Reactivate

| PAF                     | KEY EVENT TRACKING                                 | QUARTERLY ASSESSMENTS  |
|-------------------------|--|--|
| PAF HISTORY<br>1/1/2010 | View Current KET Status<br>KET HISTORY<br>8/1/2011 | QUARTERLY HISTORY<br>7/1/2011 (missing)<br>4/1/2011 (missing)<br>1/1/2011 (missing)<br>10/1/2010 (missing)<br>7/1/2010 (missing)<br>View All |

6. Continue by following the instructions at step 6 - 7 for “To Correct or Update a KET\*\* for an Active Partner” listed previously in this chapter.

### To Clear all Incorrect Information in a KET\*\* for an Inactive Partner:

1. Follow steps 1 – 5 from the “To Correct or Update a KET\*\* for an Inactive Partner” instructions listed previously in this chapter.
2. Continue by following steps 2 – 7 from the “To Clear all Incorrect Information in a KET\*\* for an Active Partner” instructions listed previously in this chapter.

## Chapter 11: Data Correction

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### Correcting, Updating and Deleting a 3M with the Online FSP DCR

False information on the 3M can be corrected, and missing information on a 3M can be updated for active or inactive partners. 3Ms cannot be deleted at this time with the FSP DCR, but all incorrect information in a 3M can be cleared. However, clearing all information from a 3M will not restore its original (**missing**) status as is seen for new empty 3Ms which are also awaiting completion.



#### To Correct or Update a 3M for an Active Partner:

1. Log into ITWS and access the FSP DCR application.
- ❖ Refer to [Chapter 3 “The Online System Interface” at section “Accessing the FSP DCR Application”](#) for details on accessing the FSP DCR application.
2. Navigate to the **Partnerships** menu and **Manage Active Partners** submenu to display the list of active partners.
3. Locate the partner of interest through the list or through a search.
- ❖ Refer to [Chapter 10 “Managing Partners with the Online FSP DCR” at the section of “Managing Active Partners”](#) for details on the **ACTIVE Full Service Partners** table.
- ❖ Refer to [Chapter 10 “Managing Partners with the Online FSP DCR” at the section of “Searching for Partners”](#) for details on searching for active partners.
4. As seen in Figure 11-6.1, select the partner’s name to display the **Outcomes Assessments for:** table.
5. As seen in Figure 11-6.1, select a 3M date link under the **Quarterly History** heading, and you will be returned to the 3M.

## Chapter 11: Data Correction

Figure 11-6.1

Department of Mental Health  
MHS Data Collection and Reporting

County: County 59

Home Partnerships Transfers Admin Help

Search for: [Last Name] [Go]

ACTI  
Add New Partner (PAF)  
Manage Active Partners  
Inactive Partners

| Partner Name    | CSI CCN   | County ESP ID    | Age | Partnership Date | Assigned PSC | PAF Status |
|-----------------|-----------|------------------|-----|------------------|--------------|------------|
| Bedelia, Amelia | 857845744 | RT4567861255     | 46  | 3/4/2011         | Joe Jenkins  | Pending    |
| Bobby, Bobby    |           |                  | 11  | 7/15/2011        | Gene Mendel  | Pending    |
| Jones, Junie    | 256689875 | 1555             | 19  | 7/1/2009         | Gene Mendel  | Pending    |
| Jenny, Jenny    | 455684456 | 564581104575664A | 12  | 1/5/2011         | Joe Jenkins  | Pending    |
| Mulligan, Mike  | 459293291 | AB39493049303    | 39  | 10/20/2009       | Mary Office  | Pending    |
| Paper, Jackie   |           |                  | 23  | 11/5/2009        | Mary Office  | Pending    |
| Quimby, Ramona  |           |                  | 55  | 10/3/2010        | Gene Mendel  | Pending    |

Outcomes Assessments for: Jenny, Jenny

| PAF  | KEY EVENT TRACKING  | QUARTERLY ASSESSMENTS                               |                     |
|--|---|---|---------------------|
| 1/5/2011<br>(pending)<br>Validation Report | <a href="#">View / Update Current KET Status</a><br><a href="#">Enter New KET</a> | Currently Due:<br>10/5/2011                         | Days Past Due:<br>0 |
|  | KET HISTORY<br>9/1/2011   | QUARTERLY HISTORY<br>7/5/2011<br>4/5/2011 (missing) |                     |

- Find the fields in the 3M with incorrect data and correct the data by selecting the field and deleting the current information and replacing it with new information or by selecting a different radio button. Find the fields missing data and update the field with new data.

**Note:** The partner information, such as partner name and birth date, cannot be updated on the 3M. However, partner information can be corrected or updated in the PAF, and changes in the PAF will then be displayed throughout all current or new KETs and 3Ms.

- Refer to [Chapter 2 “Introduction to the FSP DCR”](#) at section “[FSP DCR Data Hierarchy](#)” for a complete list of all partner information & administrative data fields which will be automatically update through all KETs and 3Ms when corrected on the PAF.

- Once all fields have been updated, click the **Submit** button. A menu will appear, “You are about to overwrite an existing assessment. Do you want to continue?” Click **Ok**. The updated information will be stored.

## Chapter 11: Data Correction



### To Clear all Incorrect Information in a 3M for an Active Partner:

1. Follow steps 1 – 5 for “To Correct or Update a 3M for an Active Partner” instructions listed previously in this chapter.
2. As seen in figure 11.7.1, with the 3M form open with incorrect data to be cleared, click the **Expand All Domains** link to display the form in its entirety.
3. As seen in figure 11.7.1, scroll through the form, and at the beginning of each domain, select the **Clear Domain** link, as necessary. The fields for the domain will be set to blank and all radio buttons will be set to unselected.
4. As seen in figure 11.7.1, a message will appear asking if you are sure you want to clear all of the values. Select **OK**.

Figure 11-7.1

Department of Mental Health  
MHS Data Collection and Reporting

Home Partnerships Transfers Admin Help

County: County 59

Search for: Last Name [Go]

Update Existing Quarterly

Training Only

FULL SERVICE PARTNERSHIP  
Child / Youth Quarterly Assessment Form  
FOR AGES 0-15 YEARS

Expand all Domains

2.

3.

Clear Domain

4.

Message from webpage: Are you sure you want to clear all the values in EDUCATION ?

OK Cancel

PARTNERSHIP INFORMATION

County: County 59

CSI County Client Number (CCN):

County Partner ID (optional):

Partner's First Name: Moaring

Partner's Last Name: Myrtle

Date Completed (mm/dd/yyyy): 07/01/2011

Partner's Date of Birth (mm/dd/yyyy): 01/01/2001

EDUCATION

Is the partner CURRENTLY receiving special education due to serious emotional disturbance?  Yes  No

Is the partner CURRENTLY receiving special education due to another reason?  Yes  No

Estimate the partner's attendance level (excluding scheduled breaks and excused absences) CURRENTLY:

Always attends school

Attends school most of

Sometimes attends school

5. Repeat steps 3 and 4 until all of the incorrect data is cleared from the 3M form, except for the Partnership Information (which can only be changed on the PAF).
6. Click the **Submit** button to resubmit the new blank 3M form to overwrite the existing 3M form.

## Chapter 11: Data Correction

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**Note:** Although a 3M can be stored without any data, from the Manage Active Partners webpage, the link for that 3M will not display the **(missing)** indicator. Therefore, although all of the 3M information is missing, the 3M will appear as if it has been completed. You can later access the cleared form and complete the 3M with the correct information.

---

7. A message box will appear asking if you are sure you would like to overwrite the existing assessment. Click **OK**.

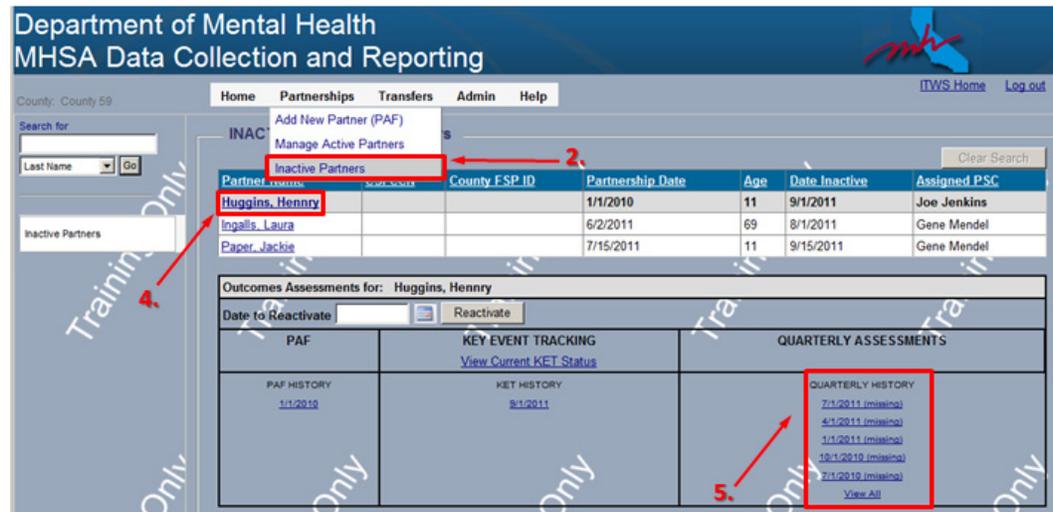


### To Correct or Update a 3M for an Inactive Partner:

1. Log into ITWS and access the FSP DCR application.
- ❖ Refer to [Chapter 3 “The Online System Interface” at section “Accessing the FSP DCR Application”](#) for details on accessing the FSP DCR application.
2. Navigate to the **Partnerships** menu and **Inactive Partners** submenu to display the list of inactive partners.
  3. Locate the partner of interest through the list or through a search.
- ❖ Refer to [Chapter 10 “Managing Partners with the Online FSP DCR” at the section of “Managing Inactive Partners”](#) for details on the **INACTIVE Full Service Partners** table.
  - ❖ Refer to [Chapter 10 “Managing Partners with the Online FSP DCR” at the section of “Searching for Partners”](#) for details on searching for inactive partners.
4. As seen in Figure 11-8.1, select the partner’s name to display the **Outcomes Assessments for:** table.
  5. As seen in Figure 11-8.1, select the 3M date link under the **3M History** heading.

# Chapter 11: Data Correction

Figure 11-8.1



6. Continue by following the instructions at step 6 - 7 for “To Correct or Update a 3M for an Active Partner” listed previously in this chapter.



## To Clear all Incorrect Information in a 3M for an Inactive Partner:

1. Follow steps 1 – 5 from the “To Correct or Update a 3M for an Inactive Partner” instructions listed previously in this chapter.
2. Continue by following steps 2 – 7 from the “To Clear all Incorrect Information in a 3M for an Active Partner” instructions listed previously in this chapter.

## Correcting Data through XML Batch Upload

Data can be corrected and updated through XML batch updates. Updated PAF, KET and 3M records can overwrite existing information in the FSP DCR with similar constraints as apply for the online FSP DCR.

A brief overview of the business rules for data correction is noted in the next section.

- ❖ Refer to [all previous sections in this chapter](#) for further information on the capability to correct data via the online FSP DCR as a reference for capabilities to correct or update data via XML batch upload.
- ❖ Refer to [Chapter 6 “Data Reporting Options” at section “XML Batch Corrections”](#) for further information on submitting FSP DCR data via this method.

# Chapter 11: Data Correction

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## Overview of Business Rules for Data Correction

### ➤ PAF Data Correction Rules:

- False information on the PAF can be corrected, and missing information on a PAF can be updated for active or inactive partners. PAFs can be deleted; however, a partner can only have one PAF at a time for a partnership, and deleting the PAF will delete the entire partnership.
  - The partnership date cannot be updated on the PAF. However, other partnership information & administrative data fields can be corrected or updated in the PAF. The corrections and updates on some administrative fields will immediately be viewable throughout all KET and 3M assessments in data extracts and in the online FSP DCR system.
  - When correcting a partner's birth date on the PAF, the age group for the partner at the time the partnership was established could change. If a correction to the birth date results in a change of age group at the time of the partnership, the PAF form will not update to the appropriate PAF type to accommodate the change. Therefore, in this case, the partnership should be deleted and recreated in the FSP DCR. If the change to the birth date does not change the age group for the partner for any assessments already entered into the DCR, then proceed with changing the birth date.
- False information on the PAF can be corrected, and missing information on a PAF can be updated for inactive partners as well.

### ➤ KET Data Correction Rules:

- False information on KETs\*\* can be corrected and missing information on existing KETs\*\* can be updated for active partners. KETs cannot be deleted at this time within the FSP DCR, but all incorrect information in a KET\*\* can be overwritten with null/blank values.
  - The **Partnership Status** cannot be updated or corrected in an existing KET. In order to discontinue or reestablish a partner you must begin a new KET.
  - All information on a KET with a partnership status change (discontinuation or reestablishment) cannot be changed in any way at any time.
- Information on existing KETs\*\* can be updated for inactive partners as well. Like active partners, the information for the partnership status cannot be updated on existing KETs. Unlike active partners, no new KETs can be submitted for inactive partners.

## Chapter 11: Data Correction

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**KET\*\*** This only applies to KETs which do not contain a partnership status change (i.e., discontinuation or reestablishment). KETs which contain a discontinuation or reestablishment cannot be updated, changed or deleted at any time.

---

➤ **3M Data Correction Rules:**

- False information on the 3M can be corrected, and missing information on a 3M can be updated for active or inactive partners. 3Ms cannot be deleted at this time with the FSP DCR, but all incorrect data in a 3M can be overwritten with null/blank information. However, clearing all information from a 3M will not restore its original **(missing)** status as is seen for new empty 3Ms which are also awaiting completion.
- ❖ Refer to the [Full Service Partnership \(FSP\) Data Collection and Reporting \(DCR\) Data Dictionary](#) document at the Complete Variable Index (CVI) section for a list of all variables associated with the PAF, KET and 3M.

## Appendix A: Data Reporting and Validation Rules

### Appendix A: Data Reporting and Validation Rules

| No. | Form    | Domain               | Age Group | Description   |
|-----|---------|----------------------|-----------|---|
| 1.  | n/a     | N/A                  | All       | Data should be reported within 90 days of event occurrences   |
| 2.  | 3M      | N/A                  | All       | 3Ms must be conducted within 15 days before or 30 days after their due date   |
| 3.  | All     | N/A                  | All       | For the online FSP DCR, when selecting a toggle button (e.g., yes or no) user cannot un-click all selections, so as to opt out of answering a question; if users need to opt out after a selection is made, they must select the <b>Clear Domain</b> link to unselect all toggle buttons for the domain and re-enter the information for the domain |
| 4.  | KET, 3M | N/A                  | All       | When the partner exceeds the age group range (ex: turning from 15 to 16) all KETs and 3Ms collected after the partner ages up must reflect the new age group for the partner  |
| 5.  | KET     | Partner Info & Admin | All       | If a PSC ID is changed on the same date on two or more different KETs, the partner is now moved to the latest group based on the record creation time   |
| 6.  | PAF     | Partner Info & Admin | All       | A valid CSI CCN must be submitted for the CSI-linked fields to be populated, without which the PAF Status will remain "Pending"   |
| 7.  | PAF     | Partner Info & Admin | All       | Two partners cannot have the same CSI CCN   |
| 8.  | PAF     | Partner Info & Admin | All       | The partnership date cannot be changed once a PAF is initiated  |
| 9.  | PAF     | Partner Info & Admin | All       | If the partner's birth date is changed on the PAF resulting in a change of the partner's age group at the time of the partnership date, then PAF will not reflect the change in age group; the partnership should be deleted and reinitiated with the corrected birth date entered for the partner  |
| 10. | PAF     | Residential          | All       | There must be a number of past 12 occurrences submitted for every value of past 12 days submitted, and vice versa   |
| 11. | PAF     | Residential          | All       | There must be at least one residential setting for Prior to the last 12 months  |
| 12. | PAF     | Residential          | All       | There must be at least one residential setting for the last 12 months   |
| 13. | PAF     | Residential          | All       | For residential setting during the last 12 months, there must be a value for the number of occurrences for at least one residential setting   |

## Appendix A: Data Reporting and Validation Rules

| No. | Form | Domain      | Age Group               | Description   |
|-----|------|-------------|-------------------------|---|
| 14. | PAF  | Residential | All                     | For residential setting during the last 12 months, there must be a value for the number of occurrences for every value for days   |
| 15. | PAF  | Residential | All                     | There must be one residential setting selected for where the partner resided “yesterday”  |
| 16. | PAF  | Residential | All                     | There must be one residential setting selected for where the partner resided “tonight”  |
| 17. | KET  | Residential | All                     | One KET can only contain one residential change at a time   |
| 18. | PAF  | Education   | Child                   | Since some children under the age of eight are not required to attend school, the Education Domain questions on the Child PAF are not mandatory   |
| 19. | PAF  | Education   | TAY, Adult, Older Adult | The highest level of education must be submitted  |
| 20. | PAF  | Education   | TAY, Adult, Older Adult | The partner’s educational setting during the past 12 months must be submitted   |
| 21. | PAF  | Education   | TAY, Adult, Older Adult | The partner’s current educational setting must be submitted   |
| 22. | PAF  | Education   | TAY                     | Whether or not the partner is currently receiving special education due to serious emotional disturbance must be submitted  |
| 23. | PAF  | Education   | TAY                     | Whether or not the partner is currently receiving special education due to another reason must be submitted   |
| 24. | PAF  | Education   | TAY                     | All questions must be completed in either the “Required by law to attend school” or the “Not Required by law to attend school” sections   |
| 25. | PAF  | Education   | TAY                     | A TAY PAF cannot be submitted if the two sections in the Education Domain called, “For Youth Who Are Required By Law to Attend School” and, “For Youth Who Are Not Required By Law to Attend School” are both filled out, since they are mutually exclusive |
| 26. | PAF  | Education   | Child, TAY              | There is nothing to indicate that it is inappropriate to enter a student as having good attendance while also having been suspended/expelled; since these are required fields for TAY, a PAF must be “certified” complete when leaving these fields blank   |
| 27. | PAF  | Education   | Child, TAY              | There is nothing to indicate that it is inappropriate to enter a student’s grades while also having been suspended/expelled; since these are required fields for TAY, a PAF must be “certified” complete when leaving these fields blank                    |

## Appendix A: Data Reporting and Validation Rules

| No. | Form       | Domain            | Age Group | Description   |
|-----|------------|-------------------|-----------|---|
| 28. | PAF        | Employment        | All       | There must be at least one employment status for the past 12 months   |
| 29. | PAF        | Employment        | All       | There must be at least one employment status for current employment   |
| 30. | PAF        | Employment        | All       | There must be a submission for whether or not the partner's current recovery goals include any kind of employment   |
| 31. | PAF        | Employment        | All       | For employment during the last 12 months, there must be a value for Average Hours per Week for every value of # of Weeks and/or Average Hourly Wage, and vice versa   |
| 32. | PAF        | Employment        | All       | For current employment, there must be a value for Average Hourly wage for every value of Average Hours per Week, and vice versa   |
| 33. | PAF, KET   | Employment        | All       | No other employment settings can contain information if the "partner is not employed at this time"  |
| 34. | PAF        | Financial         | All       | There must be at least one source of financial support during the past 12 months  |
| 35. | PAF        | Financial         | All       | There must be at least one source of financial support "currently"  |
| 36. | PAF        | Financial Support | All       | For sources of financial support in the last 12 months, the "No Financial Support" option can only be submitted if no other sources of financial support are submitted, indicating that the partner had no source of financial support for the entire 12 month period |
| 37. | PAF        | Legal             | All       | There must be a value submitted for the number of times the partner was arrested during the past 12 months  |
| 38. | PAF        | Legal             | All       | Whether or not the partner was arrested any time prior to the last 12 months must be submitted  |
| 39. | PAF        | Legal             | All       | Whether or not the partner is currently on probation must be submitted  |
| 40. | PAF        | Legal             | All       | Whether or not the partner was on probation during the past 12 months must be submitted   |
| 41. | PAF        | Legal             | All       | Whether or not the partner was on probation prior to the last 12 months must be submitted   |
| 42. | PAF, Child | Legal             | Child     | Whether or not the partner is currently on parole from the Division of Juvenile Justice must be submitted   |
| 43. | PAF        | Legal             | All       | Whether or not the partner was on any kind of parole during the past 12 months must be submitted  |
| 44. | PAF        | Legal             | All       | Whether or not the partner was on any kind of parole prior to the last 12 months must be submitted  |

## Appendix A: Data Reporting and Validation Rules

| No. | Form | Domain                 | Age Group  | Description  |
|-----|------|------------------------|------------|--|
| 45. | PAF  | Legal                  | All        | Whether or not the partner is currently on conservatorship must be submitted   |
| 46. | PAF  | Legal                  | All        | Whether or not the partner was on conservatorship during the past 12 months must be submitted  |
| 47. | PAF  | Legal                  | All        | Whether or not the partner was on conservatorship prior to the last 12 months must be submitted  |
| 48. | PAF  | Legal                  | All        | Whether or not the partner currently has a payee must be submitted   |
| 49. | PAF  | Legal                  | All        | Whether or not the partner has a payee during the past 12 months must be submitted   |
| 50. | PAF  | Legal                  | All        | Whether not the partner had a payee prior to the last 12 months must be submitted  |
| 51. | PAF  | Legal                  | Child, TAY | Whether or not the partner is currently a dependent of the court must be submitted   |
| 52. | PAF  | Legal                  | Child, TAY | Whether or not the partner was a dependent of the court during the past 12 months must be submitted  |
| 53. | PAF  | Legal                  | Child, TAY | Whether or not the partner was a dependent of the court prior to the last 12 months must be submitted  |
| 54. | PAF  | Legal                  | All        | There must be a numeric amount submitted for the total number of children the partner has who are currently on W & I Code 300 status as a dependent of the court     |
| 55. | PAF  | Legal                  | All        | There must be a numeric amount submitted for the total number of children the partner has who are currently in foster care placement                                 |
| 56. | PAF  | Legal                  | All        | There must be a numeric amount submitted for the total number of children the partner has who are currently legally reunified with the partner                       |
| 57. | PAF  | Legal                  | All        | There must be a numeric amount submitted for the total number of children the partner has who are currently adopted out  |
| 58. | PAF  | Emergency Intervention | All        | There must be a numeric amount submitted for the total number of emergency interventions in the past 12 months that were related to the partner's physical health    |
| 59. | PAF  | Emergency Intervention | All        | There must be a numeric amount submitted for the total number of emergency interventions in the past 12 months that were related to mental health or substance abuse |
| 60. | PAF  | Health Status          | All        | Whether or not the partner currently has a primary care physician currently must be submitted  |
| 61. | PAF  | Health Status          | All        | Whether or not the partner has had a primary care physician during the past 12 months must be submitted  |

## Appendix A: Data Reporting and Validation Rules

| No. | Form | Domain          | Age Group   | Description   |
|-----|------|-----------------|-------------|---|
| 62. | PAF  | Substance Abuse | All         | There must be an answer submitted for the opinion of the partnership service coordinator on whether or not the partner has ever had a co-occurring mental illness and substance abuse problem |
| 63. | PAF  | Substance Abuse | All         | Whether or not the partner is currently receiving substance abuse services must be submitted  |
| 64. | PAF  | ADL             | Older Adult | The level of functioning for Bathing must be submitted  |
| 65. | PAF  | ADL             | Older Adult | The level of functioning for Dressing must be submitted   |
| 66. | PAF  | ADL             | Older Adult | The level of functioning for Toileting must be submitted  |
| 67. | PAF  | ADL             | Older Adult | The level of functioning for Transfer must be submitted   |
| 68. | PAF  | ADL             | Older Adult | The level of functioning for Continence must be submitted   |
| 69. | PAF  | ADL             | Older Adult | The level of functioning for Feeding must be submitted  |
| 70. | PAF  | ADL             | Older Adult | The level of functioning for Walking must be submitted  |
| 71. | PAF  | ADL             | Older Adult | The level of functioning for House-Confinement must be submitted  |
| 72. | PAF  | IADL            | Older Adult | The level of functioning for Telephone must be submitted  |
| 73. | PAF  | IADL            | Older Adult | The level of functioning for Walking Distance must be submitted   |
| 74. | PAF  | IADL            | Older Adult | The level of functioning for Groceries must be submitted  |
| 75. | PAF  | IADL            | Older Adult | The level of functioning for Meals must be submitted  |
| 76. | PAF  | IADL            | Older Adult | The level of functioning for Housework must be submitted  |
| 77. | PAF  | IADL            | Older Adult | The level of functioning for Handyman Work must be submitted  |
| 78. | PAF  | IADL            | Older Adult | The level of functioning for Laundry must be submitted  |
| 79. | PAF  | IADL            | Older Adult | The level of functioning for Medication must be submitted   |
| 80. | PAF  | IADL            | Older Adult | The level of functioning for Money must be submitted  |