Table of Contents

Follow Up Monthly Procedures

Finding Clients that need Follow Ups for a month

As of FY08 the Follow Up contact requirements in the Purchase of Service Standards changed (page 6 letter m) to include the words "(initial referrals)". To make sure all CCR&Rs are pulling clients that need follow up contacts the same, INCCRRA is using the below query for statewide consistency.

1. Log onto NACCRRAware.
2. Choose Custom Search > Client, check Date Start 12 Months then press "NEXT" button, enter query as: Date Start 12 Months Greater or Equal **"1st day of reporting month"** AND Date Start 12 Months Less or Equal **"Last day of reporting month"**
3. **QUERY:** Date Start 12 Mo Greater or Equal "7/1/2008" AND Date Start 12 Mo Less or Equal "7/30/2008"
4. Choose "CUSTOM REPORT" Button.
   Note: If this is the first time you are doing a "FOLLOW UP" custom search, you can save this search before you run the custom search, save it from the "Client Custom Search-Query Builder" page.

Create "search name" 

then select 

.

Later you can retrieve this saved search by going to the "Client Custom Search-Fields Select" page.

.

5. Check the following field boxes: (You may choose to use only some of the below fields, depending on how you are going to contact the Client. Include the ones with an asterisk every time.)
   - ☐ Client ID*
   - ☐ First Name*
   - ☐ Last Name*
   - ☐ Status Date*
   - ☐ Date Last Request*
   - ☐ Date Start 12 Mo.*
   - ☐ Area Code
   - ☐ Phone
   - ☐ Work Area Code
   - ☐ Work Phone
   - ☐ Email
   - ☐ Cell Phone Area Cd
   - ☐ Cell Phone
   - ☐ Child Name*
   - ☐ Special Needs*
   - ☐ Follow Up Date*
   - ☐ Counselor ID*

6. Select "NEXT" button.

7. Make sure the fields are in the following "column order" and then "sort" by Counselor ID

Sort Options		
Field Name	**Column Order**	**Sort Order**
Client Id	1	None
First Name	2	None
Last Name	3	None
Status Date	4	None
Date Last Request	5	None
Date Start 12 Mo	6	None
Area Code	7	None
Phone	8	None
Work Area Code	9	None
Work Phone	10	None
Email	11	None
Cell Phone Area Cd	12	None
Cell Phone	13	None
Child Name	14	None
Special Needs	15	None
Follow-Up Date	16	None
Counselor (by userid)	17	1

8. Select "RUN CUSTOM REPORT" button.

Reminders: You have to attempt to do a follow up on all the clients that have a child with special needs and actually complete a follow up on 50% of clients that have a child with special needs. You have to contact 20% of your total clients for follow-ups. Whoever did the referral call **<u>can not</u>** do the follow up call.

Follow Up Data Entry and Referrals

According to the Purchase of Service Standards, CCR&Rs should complete 20% follow up rate on clients within 4-6 weeks from the date of referral. For clients of children with special needs, CCR&Rs should attempt to update 100% within 4-6 weeks with at least 50% actual contact.

Beginning FY06, NACCRRAware users will only need to enter Follow Ups in the PRODUCTION database for Quarters 1, 2 and 3. For **Quarter 4**, Follow Ups need to be entered into the PRODUCTION DATABASE through June 30th. After the June 30th date, Follow Ups need to be entered into the **QA database only**. Once all data is cleaned in the QA database and INCCRRA says no more changes allowed in the QA database, no more Follow Ups will be entered and counted for that fiscal year. The quarters end on these dates: (Sept 30th – Quarter 1; Dec. 31st – Quarter 2; March 31st – Quarter 3; June 30th – Quarter 4).

PERFORMING A FOLLOW UP:

- CCR&Rs can perform a follow up with a client either by mail or by phone.
  Note: If following up by phone, please have someone, other than the counselor who completed the referral originally, follow up with the client.
- There is a standard form used statewide for follow ups. You can download the form from the INCCRRA web site at www.ilchildcare.org
- Every client record contains a screen for follow up data entry.
- NACCRRAware contains fields in the Client Action Log where you can indicate the follow up was successful or unsuccessful.

ENTERING A FOLLOW UP:

- Enter into the client's record.
- Click on the **Follow Up** Screen (left hand side of the screen).
- Enter the **date** of follow up in the upper right hand corner of the screen.
- Complete the fields on the screen the parent has answered. *(Note: It is always best to get as complete of information as possible, however, sometimes clients will refuse or skip questions on the form. If that is the case, only enter on the screen what they answered and keep a copy of the form for 1-2 years in case a question comes up regarding missing information.) Enter 'YES' in the Incomplete Survey box at the top of the screen if the follow up was incomplete.*
- Be sure to Click **<Save Follow Up>** at the bottom of the page
- On the **Action Log** page, log the action **Successful Follow Up.**

Note: If you have attempted to follow up the client and have been unsuccessful, you should also log this information in on the Action Log screen. You can put in comments that you had attempted follow up and the method used. This can be very beneficial to your site if you are unable to meet the required follow up percentages. It will show you had attempted to complete the follow up.

TO FIND FOLLOW UP ACTIONS COMPLETED

(This is to find out how many follow up actions were saved through a time period - not actual records. This can be used to track work completed by a user or a group of users. Report will show records more than once if there is more than one action saved in the time period.)

In NACCRRAware, click on **Reports > Standard** from the main menu.

Click **Client**

Go to the **Action Log** report.

Enter the appropriate information:

Begin Date: This is the beginning date of the period.
(This will change with each fiscal year.)

Begin Date 7/1/2005

End Date: This is the end date. You can enter a date or leave this blank to include up to today (in Production) or up to end of the quarter (in QA or Development).

End Date

User ID: Can enter a User ID to find follow ups done by Report Format: a particular person or you can leave blank for all.

User ID

Report Format: Choose Detail to see the detail.

Detail

Detail Format Options:

Action Name: Successful Follow Up Contact Choose Successful Follow Up Contact

Sort By: Client ID Sort By: Can choose different options for sorting.

For those sites who do **not** have any Enhanced Referral Cases, you can just Click **<RUN>**

For those sites who do have Enhanced Referral Cases, you will need to exclude these from the report.

To exclude these:

Click <RUN with Query>

Choose the following fields: **Case Type**

At the bottom of the page, click <NEXT>

In the Query Builder, use the query builder to build the following search criteria: Case Type Equal "Referral"

Click <ADD QUERY and CONTINUE>

NOTE: This works well if all users have logged the follow up as Successful Follow Up on the Action Log screen. Also, if there was more than one follow up completed for a client in the time period, it will show these on this report.

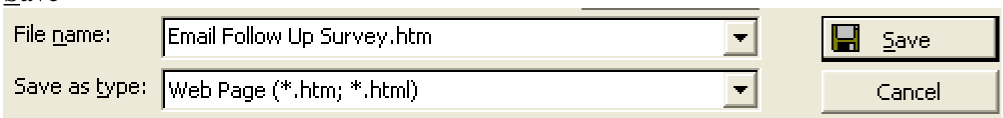
TO SEARCH AND FIND THE COUNT OF RECORDS WITH FOLLOW UPS COMPLETED AND PERCENTAGE

(This shows the actual number of records with a follow up completed during the time period. This is the number you want to use to find out your percentage.)
In NACCRRAware, click on **Custom Search** from the main menu.
Click **Client**
Choose the following fields: **Case Type, Follow Up Date, Action List, and Action Date (also Status Date if you are wanting to specify a date).**
At the bottom of the page, click **<Next>**
In the Query Builder, use the query builder to build the following search criteria:
The queries below you can use in any database (Production, QA or Development).
If you want to know **as of today** use this query: **(Case Type Equal To "Referral" AND Follow-Up Date Greater or Equal "7/1/2005") OR (Case Type Equal To "Referral" AND Action List Equal To "Successful Follow Up Contact" AND Action Date Greater or Equal "7/1/2005")**
If you want to know **as of a certain date** use this query instead: *This example is looking for follow ups on referrals completed 7/1/05-2/28/06. **(Case Type Equal To "Referral" AND Status Date Less Than "03/01/2006" AND Follow-Up Date Greater or Equal "7/1/2005") OR (Case Type Equal To "Referral" AND Status Date Less Than "03/01/2006" AND Action List Equal To "Successful Follow Up Contact" AND Action Date Greater or Equal "7/1/2005")**
Click **<Run Query>**
NOTE 1: Change the Follow Up Date in the above queries, every fiscal year.
NOTE 2: Enhanced referrals are not counted in the statewide required follow up percentage.
NOTE 3: This works well if all users have logged the follow up as Successful Follow Up on the Action Log screen.
Once you get the number completed you can divide by the total number of referrals in that time period to get the percentage.

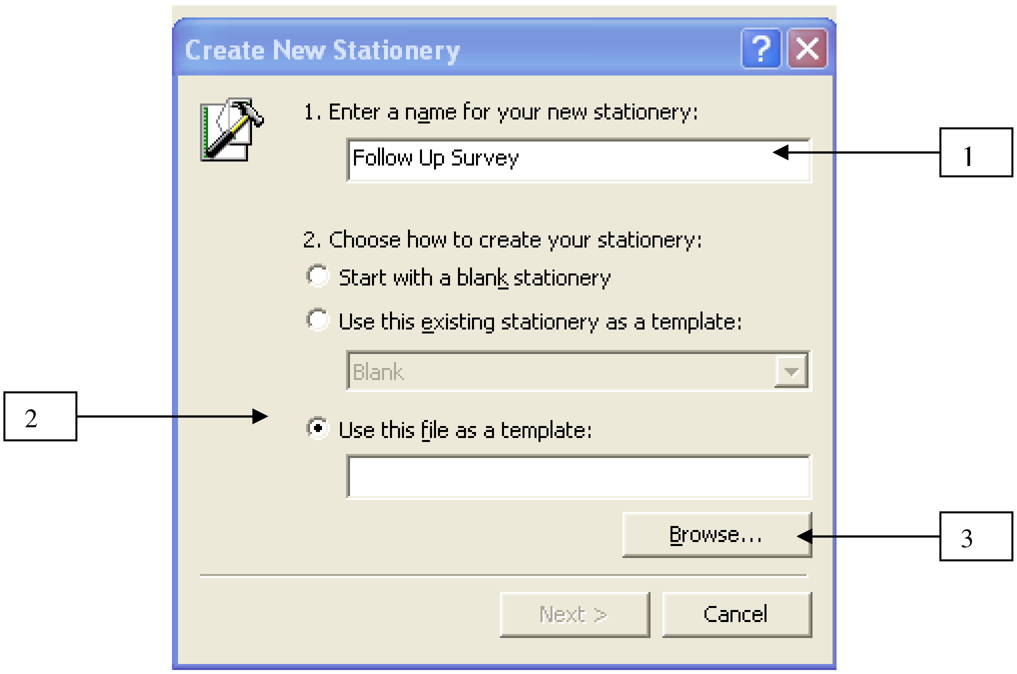
To get the total number of referrals in that time period:
In NACCRRAware, click on **Reports > Standard** from the main menu.
Click **Client**
Select **Active Client Listing** report.
For those sites who do **not** have any Enhanced Referral Cases, you can just
Click **<RUN>**
For those sites who do have Enhanced Referral Cases, you will need to exclude these from the report.
To exclude these:
Click <RUN with Query>
Choose the following fields: **Case Type (also Status Date if you are running it for a specific time period).**
At the bottom of the page, click **<Next>**
In the Query Builder, use the query builder to build the following search criteria: **Case Type Equal "Referral"**
If you are running it **as of a certain date** then use this query instead:
Case Type Equal To "Referral" AND Status Date Less Than "03/01/2006"
Click ADD QUERY and CONTINUE button.
Total Records is the total number of referrals in your database.
Take the follow ups completed and divide by the number of Total Records to get the percentage.
Example: 200 follow ups completed out of 600 referrals = .33 or 33%

Emailing Follow Up Survey

Save the Word document “Email Follow Up Survey” as HTML
(You should have received this document from INCCRRA)
Go to File > save as > change ‘Save as type’ to Web Page (*.htm; *.html) like below screen shot > Save

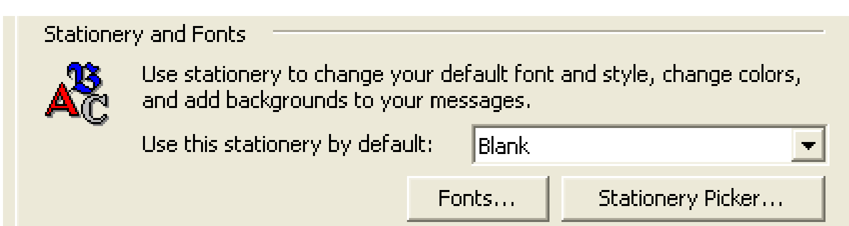


In Outlook:
Adding Follow Up Survey to your Stationery Picker
Go to Tools > Options > Mail format tab > select Stationery Picker button
Select New



4 Find the saved HTML document called “Follow Up Survey”

Select Next
Select OK, **two times**
Go back into Stationery Picker, Select Blank then OK.
It should show up like below screen shot.



Select OK again.

To include the Follow Up Survey in your email:

1. **Make sure you are in your Inbox**
2. Go to Actions
3. Select “New Mail Message Using”
4. Select “Follow Up Survey”

Notes: You must follow the above 4 steps, you can’t just select New Mail Message.

In Outlook Express:

These are general directions. If more specific are needed, please contact INCCRRA.

Place that file in the directory where the factory stationery is. The only glitch I've seen is that if you try to insert it the stationery after you've created a new message from the path on the toolbar it won't appear on the page. You have to

Foster Family Referrals

Steps in entering these referrals

There are set procedures for entering families with foster children into NACCRRAware. For example: families with foster children should never be charged a fee. The NACCRRAware database needs the data on foster children and families entered where we can report the number of foster children served and be able to use the data for other important statistics. Foster families referrals are entered similar to regular client referrals but there are specific fields in the NACCRRAware database to be used just for foster families and their children. This tip sheet is designed to assist database users in entering the information into the database correctly.

<u>On the General Screen of the Client:</u>

- In the **Client Type** field choose **"No Fee/Foster"**
- Enter **0.00** in the **Fee Amount** field
- Choose **"Yes"** for the **Financial Assistance** field

<u>On the Child Screen of the Client:</u>
If the family consists of both foster children and children who are not foster children, enter the children who are not foster children as you would children on a regular referral. Also enter the foster children as you would children on a regular referral but include the following information:

- Under the **Subsidy Sought** field enter **"DCFS Voucher"**
- Under the **Subsidy Status** field enter **"Has DCFS Voucher"** **<u>AND</u>** **"Foster Child"**

<u>On the Statistics Screen of the Client:</u>

- In the **Relation to Child** field enter the relation of the client calling. (Please refer to the NACCRRAware manual for a more complete definition of Relation to Child).
- In the **Income Category** field enter **"No Data"** **<u>OR</u>** the Income of the family if they choose to supply it. (Regardless of their income, a foster family is never charged a fee.)
- In the **Family Size** field include all persons living in the household. (Please refer to the NACCRRAware manual for a more complete definition of Family and Family Size).
- For the **Subsidy Eligibility** field, please mark both "**State Subsidy Eligible"** **<u>AND</u>** **"KidCare Eligible"**
- In the **Eligibility Status** field please mark "**Foster Family"** **<u>AND</u>** "**Has State Subsidy"**

You can also reference page 2 of the Client Definitions in the NACCRRAware Manual for information on entering Foster families.

Reactivating Clients

As you know, clients can call and receive referrals in more than one fiscal year. Our fiscal year is from July 1st through June 30th. In NACCRRAware, we reactivate the inactive client record if they phone back in the new fiscal year. When we reactivate, we need to determine at the time of reactivation if the client is still within their 12 months of service.

If they are within their 12 months of service:
Ask the parent if anything regarding their child care request is different from their previous request. Change those items the parent has indicated is different: (Example: Contact information, number of children, etc. Update what they have indicated is different.)
NOTE: Since the parent has already been assessed as a fee or no fee when their 12 months of service began, they cannot be assessed as fee/no fee again until their 12 months of service expires.

Status:	Change to "**Active**". *The "As of" date will default to the date of reactivation.*
Date Start 12 Mo:	leave this date as it is
Client Status:	Field will need to be changed to "**Previous Client – New Case**" (*this is a previous client within 12 months of service but a new case in this fiscal year*) **(OPTIONAL field beginning FY07 – 7/1/2006)**
Client Type:	Check to see if they are Fee Paying and if they paid in the previous fiscal year. If they paid in the previous fiscal year – Change to "**Paid Previous FY**" otherwise leave the Client Type field as you found it. Leave the Fee Amount, Payment Method and Payment Received Date as you found it. Uncheck Initial Billing if this is marked "Paid Previous FY"
Number FY Repeats:	Needs changed to "**00**" (*this is a new fiscal year*)
Date Last Request:	Change this to the date of this referral.
Child Records:	Enter only the children indicated needing care in **this fiscal year's** referral call. If there are child(ren) in the record from the **previous fiscal year's** call and the parent does not need care for them in this referral call – Delete the child from record. (*Rationale: We want the fiscal year to reflect only those children who needed care and whom the referral search was performed. The archive from the previous quarters will count these children and their referral information in that time period.*) Update the information on the children needing care to the current referral request.
Follow Up Screen:	At the beginning of each fiscal year, INCCRRA will globally replace the follow up fields to where there is no data in the Production database follow up fields. (*Rationale: We want the fiscal year to reflect only the follow up information collected in **this** fiscal year. The archive from the previous quarters will count those children and their referral information in that time period.*)
Action Log:	Indicate "**2nd Search"** or "**3 or More Searches"** in the Action Log depending upon how many times the Client has already contacted the CCR&R within their 12 months of service.

If they are past their 12 months of service:

Treat this client as a NEW client and update all the information in their record.

Pay special attention to the following fields:

Status: Change field to "**Active**". *The "As of" date will default to the date of reactivation.*

Date Start 12 Mo: Change date to referral date because they are being re-evaluated.

Client Status: Field needs to be changed to "**New Client**" (*since they are past their 12 months of service – they will be treated as a new client and reassessed.*) **(OPTIONAL field beginning FY07 – 7/1/2006)**

Client Type: Re-evaluate the Client Family Size and Income to determine what they should have marked in this field. Enter the new information.

Number FY Repeats: Needs to be changed to "**00**" (*this is a new fiscal year*)

Date Last Request: Change this to the date of this referral.

Child Records: Enter only the children indicated needing care in **this fiscal year's** referral call. If there are child(ren) in the record from the **previous fiscal year's** call and the parent does not need care for them in this referral call – Delete the child from record. (*Rationale: We want the fiscal year to reflect only those children who needed care and whom the referral search was performed. The archive from the previous quarters will count those children and their referral information in that time period.*) Update the information on the children needing care to the current referral request.

Follow Up Screen: At the beginning of each fiscal year, INCCRRA will globally replace the follow up fields to where there is no data in the Production database follow up fields. (*Rationale: We want the fiscal year to reflect only the follow up information collected in **this** fiscal year. The archive from the previous quarters will count these children and their referral information in that time period.*)

Action Log: Indicate "**Initial Call"** in the Action Log since they have begun a new 12 months of service.

<u>To Find Reactivated Clients Who May have Incorrect Information:</u>

In NACCRRAware, click on **Custom Search** from the main menu.
Click **Client**
Choose the following fields:
Date Start 12 Mo
At the bottom of the page, click <**Next**>
In the Query Builder, use the query builder to build the following search criteria:
Date Start 12 Mo Less Than "07/01/2005"
Click **<Run Query>**
Note: Change the date above when the fiscal year changes to the first day of the current fiscal year.
Minimize these results using the **"-"** on the upper right corner of the window.
Click **<Build Custom Report>**

Choose the following fields:
Client Type, Billing, Client ID, Date Start 12 Mo, Date Last Request, Number FY Repeats, Status Date, Date Care Needed, Follow Up Date
At the bottom of the page, click <**Next**>
Put the fields in the following sort order:

Sort Options		
Field Name	**Column Order**	**Sort Order**
Client Id	1	None
Date Start 12 Mo	2	None
Status Date	3	1
Date Last Request	4	None
Date Care Needed	5	None
Number FY Repeats	6	None
Client Type	7	None
Billing	8	None
Follow-Up Date	9	None

Look through the Custom Report for data that does not accurately reflect the completed referrals in this fiscal year.

Using the Verified List

Logging Provider and Client IDs verified correct

Through the data check process, you may find some provider and client records that are correct, but show up on a data check for one reason or another. If the record has been verified as correct, please indicate it on the Verified List for your agency. By indicating it on the list, INCCRRA staff will know the record on the data check as been verified as correct. It also can serve as an explanation in the future why this particular record was not changed or shows up differently than the other records in the database.

The Verified List is an Excel file located in the NW > Data Checks folder on the FTP site. You will have to copy and paste this file to your computer, make the change(s) and then copy and paste it back into the NW Data Checks Folder.

HOW TO COPY AND PASTE THE VERIFIED LIST

- Connect to the FTP site using your special SDA-specific URL (web site address)
- Navigate through the folders to you get to the NW > Data Checks folder
- Look inside the Data Checks Folder for an Excel file
- Highlight the Excel file and choose Edit>Copy or right click and Copy
- Minimize the screen
- Navigate to a folder under your computer's hard drive
- Choose Edit>Paste or right click and Paste
- Open the Excel file and add/edit the necessary information
- Save and close the file
- Highlight the file again and choose Edit>Copy or right click and Copy
- Maximize the screen showing the FTP NW Data Checks
- Click in the white space on the right hand side of your screen (not over any files)
- Choose Edit>Paste or right click and Paste
- If you didn't change the name, it will bring up a message to overwrite, choose yes and overwrite.

HOW TO ENTER INFORMATION INTO THE VERIFIED LIST

- Include Agency ID so INCCRRA can copy and paste your entire list into a list with all the other SDAs. This will allow us to sort by data check number.
- Please wrap text in the Comments cells. To wrap text in a cell:
    - Right click the cell
    - Choose Format Cells
    - Choose the Alignment tab
    - Place a check mark in the check box for Wrap Text
    - Choose OK
- Use one data check number per row.
- Enter ID numbers. Do not say, "All IDs are correct". There may be new numbers that show up next quarter that haven't been verified. We can add a "quarter" column <u>or</u> a "date verified" column, if needed.
- Delete anything that isn't relevant anymore. Maybe it was changed with a Complete Update so it isn't showing up on a data check anymore.
- Client will have a new tab for each fiscal year. This way we have documentation why the records are showing up differently in that particular archive. We can refer back and know the records have been verified as correct and possibly the reasons for the difference.

Shared Referrals Between SDAs

Referral Scenarios (Not Shared Corporate Cases)

Example 1: Parent lives in SDA 05 but is looking for care in a county/area, which SDA 05 does not serve. They call SDA 05 looking for care.

What needs done: Explain to the parent that SDA 5 does not cover the county/area for which they are calling and give them the contact information for the CCR&R that does cover that county/area. No fee is collected and no information is entered into NACCRRAware.

(Additional information will be added to NACCRRAware manual page 4-2):
Please only complete referrals for families and children who need child care in your Service Delivery Area (SDA). If a client contacts your CCR&R and does not need care in your SDA, please refer them on to the CCR&R, which can assist that client.

Example 2: Parent lives in an area not served by SDA 05 but is looking for care in SDA 05 and contacts SDA 5 as the first R&R looking for care.

What needs done: Do the referral as requested. If your SDA is the only CCR&R they have contacted for referrals, collect the fee, if applicable.

Ask the parent if they paid a fee and used the CCR&R service somewhere else. (Possibly adjust script where the counselor could ask: "Have you used the CCR&R referral service before?" "If so, where and how recently?" If they have used the referral service within their 12 months of service at another CCR&R and paid a fee, waive the fee at your CCR&R.)

Example 3: Parent lives in SDA 05 and is looking for care in a county/area, which SDA 05 serves, but also in a county/area that is served by another SDA.

What needs done: Complete the referral for the county/area in your SDA. Explain to the parent the area/county they are requesting is covered by two different CCR&Rs. Give the parent the contact information for the other CCR&R, which will be assisting her with the remaining part of the referral. (Just so she has both in case she has questions, etc.) Contact the other CCR&R to inform them of this shared referral. Log in Action Log this is a "Cross SDA Referral". Both CCR&Rs need to log this action in the Action Log.

Options on Intake form / Referral:

- Recommended as best approach: Fax the completed client intake form to the other CCR&R and contact them to explain this is a "shared" referral. (Parent could possibly get 2 packets but would <u>not</u> have to go through the intake process twice and the parent counselor at the 2nd CCR&R would not have to spend the extra time in completing intake.) It would work best for the parent to actually speak to both CCR&Rs due to the uniqueness of the area they are requesting and the CCR&R referral staff's knowledge of the specific resources in their SDA. A way to eliminate two mailings, 2nd CCR&R can fax the referrals back to the 1st CCR&R to send the referral packet to the client.
- Other Option: Tell the parent to contact the other CCR&R for the remaining part of the referral (Parent and parent counselor at 2nd CCR&R would have to go through the entire intake process again. Parent would receive 2 mailings.) Not as customer-service based but an option.
- Other Option: If CCR&Rs agree, a user can be set up in the other CCR&R's database where designated staff at SDA 5 could do a search and referral in the other SDA's database. The referral would be saved in both SDA's databases. The referral information from both databases could be sent to the client at one time. Pros: Saves time, postage and parent does

not get more than one mailing. Information flow would be more efficient and streamlined and client would most likely receive the information quicker. Cons: Not always best due to understanding of neighborhoods and database local fields. Training can be an issue. Security level has to be high enough to allow a change to the Status field when reactivating clients. CCR&R may not want other "external" users to have that high of a security level.

Options on collecting fees:

- Recommended as best approach: The CCR&R who was the first contacted and where a client actually received referrals or a referral search was conducted collects the fee. Any subsequent CCR&R who is contacted to conduct referral searches within the client's twelve month of service waives the fee. (All SDAs must agree or this will not work.) According to the Assurances: "payment of the fee shall entitle a family to receive child care consultation and referrals from CCR&R for one year." Reason believed to be best approach: From looking at the database information, there aren't a large number of shared referrals, which are in the fee-paying range. If SDA's regularly "share" referrals, the amount should even out over a period of time. Overall, the total amount collected in a fiscal year would be small. This approach is believed best for customer service and public relations.
- Other Option –Not recommended: Both CCR&Rs waive the fee (SDA's must agree)
- Other Option – Not recommended: CCR&Rs split the referral fee. (How do you collect and by which CCR&R?) (Not recommended due to the confusion it may cause and extra time by referral staff, etc.)
- Other Option – Not recommended: The CCR&R who had the most referral names collects the fee. (Not as feasible and efficient - but an option.)

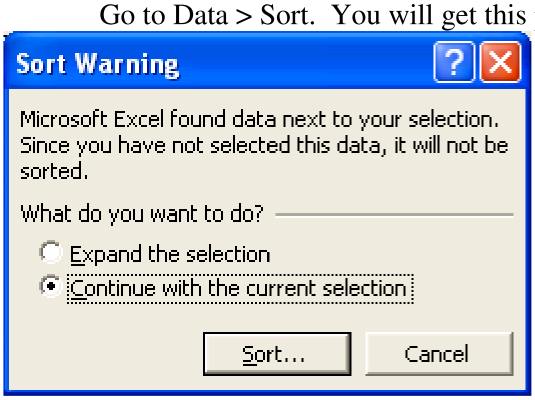
Complete Updates

According to the IDHS Purchase of Service Standards, every CCR&R must do Complete Updates annually for all child care programs.

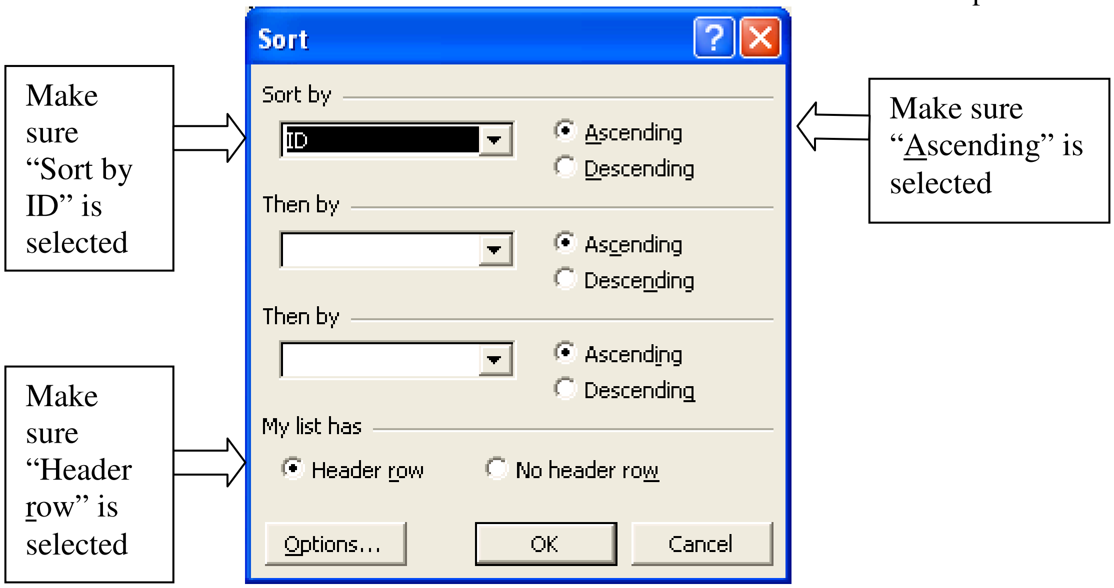
Directions to pull Complete Updates

- Custom Search > Provider, select Action List and Action Date
  Use this query: Action Date Greater or Equal "7/1/2004" AND (Action List Equal To "Complete Update" OR Action List Equal To "Added New Provider").
  Note: You will have to add the parentheses around the OR statement. Also, the Action Date will change every fiscal year.
- Run Query
- Edit > Select All > Edit > Copy (or right click, Copy)
- Paste into Excel
- Delete every column except column A.
- Minimize Excel and go back into NACCRRAware.
- Go to: Reports > Standard > Provider
- Run "Active Provider List" report.
- Edit > Select All > Edit > Copy (or right click, Copy)
- Maximize Excel
- Edit > Paste (or right click, Paste) in column B (next to the IDs already in column A).
- Delete everything except column A and B (both ID columns)
- Look at the Total Records in cell A2 vs. cell B2 (row 2). Subtract column A from column B, that is how many providers still need a complete update. To determine which provider ids still need a Complete Update do the following:

1. Put your cursor in cell A3
2. Select Shift and Ctrl at the same time then press the down arrow ↓ until you get to the bottom of the IDs. If you press too many times you will end up at row 65536. Keep pressing Shift and
   Ctrl at the same time and press the up arrow ↑ once. You should be at the end of the IDs in column A. ***Note: For column A make sure you are at the bottom of your IDs and include "Provider CustomSearch Results (page_). For column B make sure you are at the bottom of your IDs and include "Active Providers Report (page _)".***
   Go to Data > Sort. You will get this pop-up box:



3. Select "Continue with the current selection" then Sort…
4. Then you will get this box:



5. Press OK.
6. Put your cursor in cell B3 then do steps 2-5 for column B.
7. Select **all** of column A and column B by left clicking on A, holding the left mouse button down and dragging to B. All of column A and B will be highlighted.
8. Edit > Copy (or right click, Copy)
9. Open your "Comparing formula" document. Put the cursor in cell A1 and Edit > Paste (or right click, Paste).
10. Column C will tell you those providers that need a complete update. Refer to column B for the provider ids of those that need an update. ***Note: Ignore those rows that say "Need Complete Update", but don't have an ID in column B, as well as those rows that contain "Active Providers Report (page_) or have the word "ID" in column B.***

Finding Client Status Errors

As of July 1, 2006 Client Status became an optional field so data checks will not be run on this field. We removed Client Status from Client 01 data check and removed Client 34 data check all together. Since some SDAs are continuing to use Client Status. It is up to your SDA to check the accuracy of that field if you want to continue to use it. This tip sheet is designed to assist database users in running some custom reports in NACCRRAware to find errors for this field

<u>Finding Blank Client Status field (Previously Client 1):</u>

- Go to Client Custom Search-Fields
- Select In the General field “Client Status”
- In the Search Query box, include the following statement: Client Status Not Equal "New Client" OR Client Status Not Equal "Previous Client" OR Client Status Not Equal "Previous Client - New Case"

<u>Finding Client Status Equal to New Client not matching Date Start 12 Months (Previously Client 34):</u>

- Go to Client Custom Search-Fields
- Select In the General field “Client Status” and “Date Start 12 Mo.”
- In the Search Query box, include the following statement: Client Status Equal To "New Client" AND Date Start 12 Mo Less Than "07-01-2006"

Finding Client Status Equal to Previous Client - New Case not matching Date Start 12 Months (Previously Client 34):

- Go to Client Custom Search-Fields
- Select In the General field “Client Status” and “Date Start 12 Mo.”
- In the Search Query box, include the following statement: Client Status Equal To "Previous Client - New Case" AND Date Start 12 Mo Greater or Equal "07-01-2006"

<u>Finding Client Status Equal to Previous Client and Number FY Repeats incorrect:</u>

- Go to Client Custom Search-Fields
- Select In the General field “Client Status”, And “Number FY Repeats”
- In the Search Query box, include the following statement: Client Status Equal To "Previous Client" AND Number FY Repeats Equal To "00"

FY Quarter 2 Updates

Data that needs to be collected in Quarter 2 of every fiscal year

Quarter 2 (10/1 to 12/31) of every fiscal year this data must be updated in the Production database for all active Providers. Please refer to the NACCRRAware Manual for definitions of each field.

- Total Center Staff
- Rates
- Additional fees
- Licensed Capacity (Centers only)
- Enrollment (Family Child Care homes only)
- Total Special Needs

Remember to indicate in the Action Log that you completed these Quarter 2 Updates. See page 47 Q2 FY Updates Done.

Per Holly Knicker, DHS as of FY07 Q2 Summer Only programs don't need to have Q2 Updates done.

NACCRRAware Custom Search

After further review, a custom search is the best way to get the accurate number for which providers have completed a complete update or Q2 FY Update in Quarter 2. If you use Action Log report or Frequency Count it counts every time either actions were done so a provider could be counted more than once.

Here is the query you need to use when doing a provider custom search:
Action Date Greater or Equal "10/1/2006" AND Year Schedule Not Equal "Summer Only" AND (Action List Equal To "Complete Update" OR Action List Equal To "Q2 FY Updates Done")

To get the list of providers IDs, do a custom report with Provider ID. You can then compare this to your provider ids when you run an Active Provider List with query: Year Schedule Not Equal "Summer Only"

Attachment A: Complete Updates Comparing Formula

Attachment B: DCFS Licensed Providers List Headings for DCFS Licensed Providers List

Attachment C: CCC - DCFS List Comparison for Centers Formula

Attachment D: FCC- DCFS List Comparison for FCC Formula