Dane County
Department of Human Services

Lynn Green, Director

Monthly Client Service Form User Manual

Last Revised June 2010

Table of Contents

I. Overview

Each month a provider must submit a Monthly Client Service (610) Form to Dane County Department of Human Services (DCDHS) staff. The contents of the report vary from provider to provider depending upon the service rendered by such organization. In an effort to improve the efficiency of gathering data and the accuracy of reporting such data, DCDHS staff have made a decision to implement two standardized templates for reporting – AODA and CORE (non-AODA) templates.

This manual was designed to help users complete the required Monthly Client Service (610) Form for DCDHS. It is a comprehensive guide that covers where to retrieve the template, how to enter data, what data is required, and how to submit the template to DCDHS staff. It also covers key components on error checking, valid data entries, and frequently asked questions.

If, after reading this manual, the user still has questions on some of the functionality of the template, please feel free to contact your DCDHS representative for assistance.

II. Before Using the Monthly Client Service (610) Template

Supported software

The template has many built-in features that use advanced coding and macro creation. Currently, only computers running Microsoft Excel version 2000 or above are supported. Earlier versions do not have the processes needed for this template to work correctly. If you have questions as to whether or not you have the correct software, please contact your Dane County representative for assistance.

Currently, Apple Macintosh cannot use this template even if the computer is running MS Excel for Mac. We apologize for this inconvenience. If you are a provider using an Apple Macintosh computer, please follow the section entitled **REPORTING FROM A MACINTOSH COMPUTER** and/or contact your DCDHS representative for instructions on how to proceed with reporting.

Obtaining a template

To obtain a template for reporting follow these steps:

Downloading from the Internet

1. Open your Internet browser.
2. In the URL prompt (or address text box found on top of Internet Explorer), type http://www.danecountyhumanservices.org/datacollection.shtm.
3. Scroll down to the Reports section.
4. Right click on the excel icon for Monthly Client Services Report (for AODA)[1].
5. From the pop-up menu, choose Save Target As…
6. Select a destination that you would like to save the template to. (We recommend creating a folder on your C drive entitled 610_forms as you will need to save a template for each month.)
7. Click the SAVE button.

Receiving through e-mail

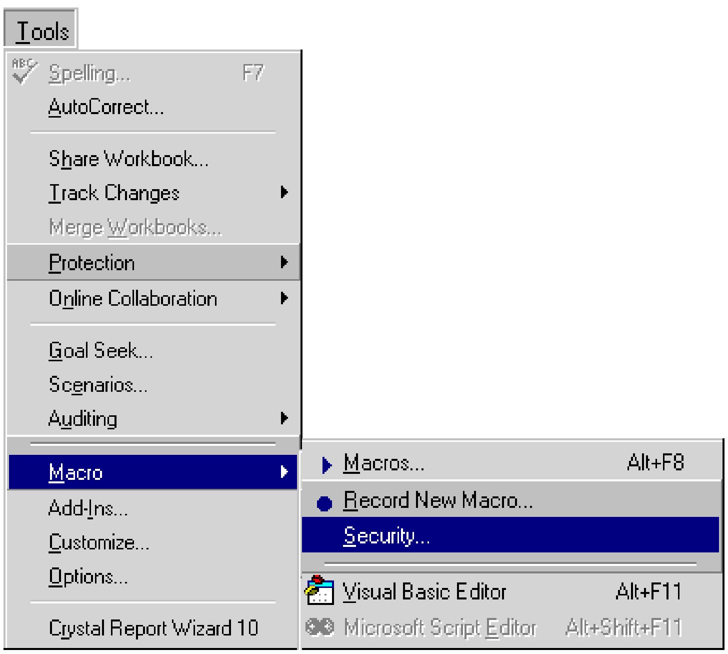
1. Send an email to your DCDHS representative requesting a Monthly Client Services Template.
2. They will send you a copy via e-mail shortly thereafter.
3. Open the e-mail.
4. Follow steps 4 – 7 above.

It is recommended that each year providers download, or request via e-mail, a new Monthly Client Service Report template. Often changes occur with State and Federal guidelines that mandate changes are made as to how data is reported. These changes will require revisions be made to the template and a new template issued. A DCDHS representative will contact providers when a new template is issued.

The Monthly Client Service template is a password-protected workbook. No changes in formatting or formulas will be accepted and may delay processing which may result in payment delays for those services. All changes will be returned to provider or case manager with directions to fix and re-submit for approval. A separate template will also need to be submitted for each DCDHS program. Only one program will be accepted per template.

Setting the Microsoft Excel security level

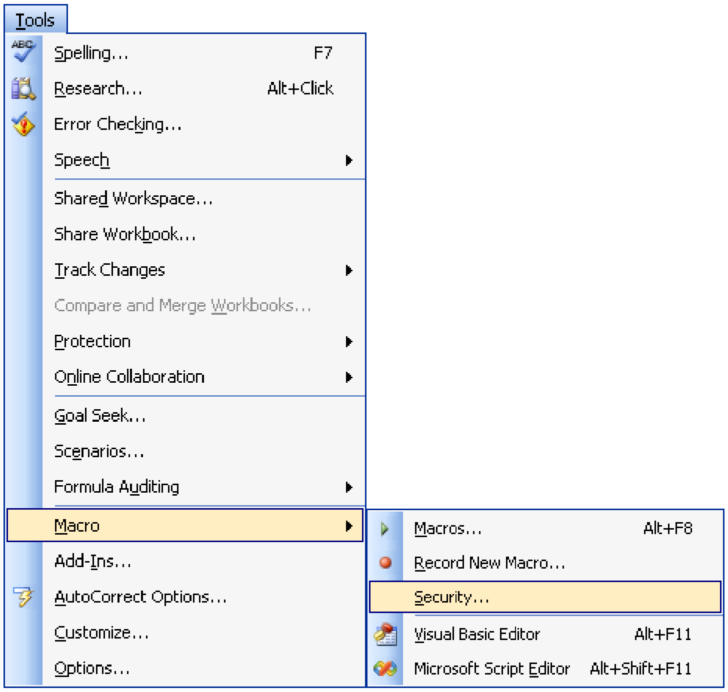
To use the embedded functions within the template, the Macro Security Setting needs to be set to the correct level. Setting the security level is global to Microsoft Excel and will affect any application within MS Excel itself. To set the correct level, follow these steps.



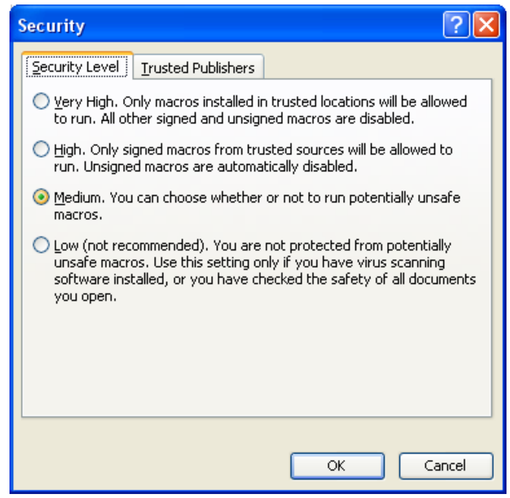
P2-1: Menu Navigation in MS Excel 2000. P2-2: Pop-up menu in MS Excel 2000.

1. Open Microsoft Excel and on the menu bar, select *Tools*.
2. Scroll down until *Macro* is highlighted and an additional window is displayed.
3. Move over and select *Security…*
4. Select the *Security Level* tab on the top of the pop up window.
5. The security level indicator should be set at “**Medium**”. If the level is indicated as “**High**”, deselect and select “**Medium**”[2].
6. Click the *OK* button.
7. Exit out of the Microsoft Excel Application.
8. Restart Microsoft Excel and open the template.
9. A Message prompt will be displayed telling you the template contains Macros and asks if you would like to *Disable Macros*, *Enable Macros*, or *More Info*[3].

10. Click the *Enable Macros* button.



P2-3: Menu Navigation in MS Excel 2003



P2-4: Security menu in MS Excel 2003

This setting allows the built-in Macros (buttons) on the template to function correctly. If the security setting is set to "**High**" the macros will **NOT** work and the user will be unable to use the function buttons on the template.

Macro Setting in Microsoft Excel 2007

There are differences in enabling your macros with MS Excel 2007. You will need to follow these steps in order to enable your macros.

P2-5: Security Warning Message in Office 2007

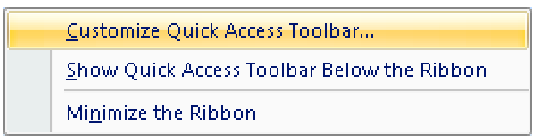
1. Click on the *Options…* button in the Security Warning ribbon above the formula bar.
2. Select *Enable this content* and click *OK*.

If no Security Warning ribbon appears when you first load the template, follow these steps:

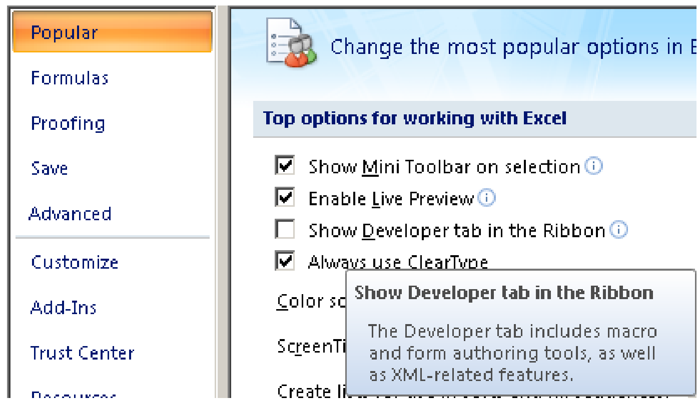
1. Right click on the ribbon next to View.
2. Select *Customize Quick Access Toolbar…* from the pop-up menu

3. Choose the *Popular* tab on the left.
4. Make sure the *Show Developer tab in the Ribbon* check box is selected.
5. Click OK
6. Select the Developer tab in the upper ribbon.
7. Select *Macro Security*.
8. Select *Disable all macros with notification* and click OK
9. Exit out of MS Excel 2007 and reload template.

You should now see the Security Warning message just above the formula bar.

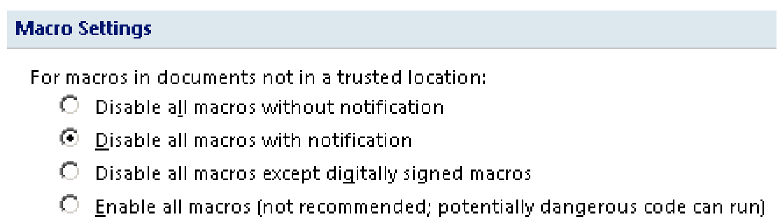


P2-6: Pop-up menu



P2-7: Make sure developer tab is selected

P2-8: Macro Security Settings



P2-9: Make sure *Disable all macros with notification* is selected

III. Entering Data on the Template

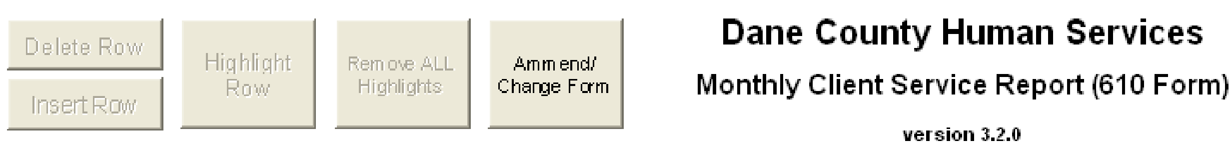
Selecting the correct worksheet in the template

When the template is opened, there will be several different worksheets (or tabs), each uniquely identified. If the provider is manually entering the data, all data should be entered on the worksheet entitled "610_Form". **All changes, including revisions, must be made on the "610_Form" worksheet.**

If the provider is importing data from a database or outside source, skip to the section of the "Users Manual" entitled "Importing data from a separate database". No changes to the worksheets' formatting or structure will be accepted.

The "Recorded_Errors" and "Upload_Errors" worksheets are where all errors that occur during processing or during the automated upload process are recorded. These worksheets are also read only and their purpose is to make it easier for providers to find and fix errors that may occur. For more information on this page, see the section "Error free checking" in "Submitting Template to Dane County" or "Error descriptions and corrections" section found in the appendix.

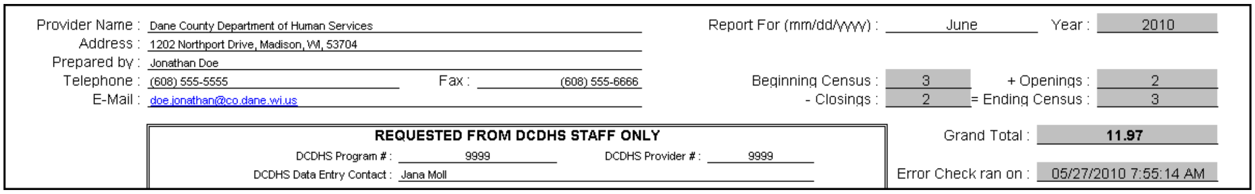
Making the template editable



P3-1: The title section of the template in non-editable mode with the *Amend/Change Form* button

The 610_Form worksheet is opened in a non-editable state. In order to enter data on to the template, the user must click the *Change/Change Form* button in the header. By doing so, the previous units, census, and execution date will be removed as well as the template buttons will become enabled, allowing the user to enter information. While the template is in edit state, the user will not be able to use the Data_Import worksheet.

Entering the Provider Information



Provider Name : Dane County Department of Human Services
Address : 1202 Northport Drive, Madison, WI, 53704
Prepared by : Jonathan Doe
Telephone : (608) 555-5555 Fax : (608) 555-6666
E-Mail : doe.jonathan@co.dane.wi.us
Report For (mm/dd/yyyy) : June Year : 2010
Beginning Census : 3 + Openings : 2
- Closings : 2 = Ending Census : 3
REQUESTED FROM DCDHS STAFF ONLY
DCDHS Program # : 9999 DCDHS Provider # : 9999
DCDHS Data Entry Contact : Jana Moll
Grand Total : 11.97
Error Check ran on : 05/27/2010 7:55:14 AM

P3-2: A picture of a completed Provider section of the “610_Form” worksheet.

The provider section of the template contains data unique to the provider; e.g. month(s) of service, the name of the person preparing the template, and the program number for the services being provided. It is important that this section be completed in its entirety so that the Department has a contact person for any questions or problems that may occur.

User entered fields:

1. **Provider name**: Enter the name of the business here.
2. **Address**: Enter the primary building address here.
3. **Prepared by**: Place the name of the person preparing the template here.
4. **Telephone**, **fax**, and **e-mail**: This is the information of the person preparing the template in case they need to be contacted. Please include an extension if applicable.
5. **Report For (mm/dd/yyyy)**[4]: Enter the reporting month here. For example, if it is August of 2007 but the units occurred in July of 2007, a date of 07/01/2007 should be entered into this field. Once entered, the name of the month will be displayed. The day entered should always be the first of the month.
6. **DCDHS Program Number**, **DCDHS Provider Number**, and **DCDHS Data Entry Contact**[5]: These fields are used with in the Dane County Department of Human Services Information System to identify the service provider, organization, and contract information for each provider. All three fields can be obtained by contacting your DCDHS Contract Manager or DCDHS Data Entry Supervisor.

The gray areas are formulated fields that cannot be altered in any way. These cells are directly generated by the information the user enters on the template. Most of these cells will only generate once the error checking process has completed with no errors reported.

Formulated fields:

1. **Year**: Derived from the report date entered by user.
2. **Beginning Census**: The total number of clients that have been entered on the template prior to any openings and/or closings being tallied.
3. **Openings**: Displays the total number of clients opening up in the reported month. This number is based upon the start date of the client and will automatically change from month to month when the report date is changed.

4. **Closings**: Displays the total number of clients closing in the reported month. This number is based upon the end date of the client. All clients that closed in the previous month will need to be removed by the user using the *Delete Row* button. Please see the section entitled “Removing previously closed clients” for further detail.
5. **Ending Census**: The ending census is derived by taking the beginning census, adding any clients that were opened in the current month and subtracting the closing clients in the current month. The ending census for the previous month should always match the beginning census for the current month (e.g. Dec closing census was 12. Jan beginning census should also be 12).
6. **Grand Total**: The total units being reported on the template for the given month.
7. **Error Check ran on**: Stores the date and time that the Check for Errors button was pressed. The automated upload process to determine the most current template submitted by the user uses this.

Required data entry from month to month

	CONSUMER INFORMATION						OPENING INFORMATION					CLOSING INFORMATION			
Data Row	New	Close	Client Name (Last, First M.I.)	Client Number	Units	Starting Date	Target Group	Client Characteristics 1st	2nd	3rd	Diagnosis	Closing Date	SPC End Reason	Income < $15K (x)	Living Alone (x)
1		x	Doe, Jane	789012	0.75	12/15/2008						06/21/2010	06	x	x
2	x		Doe, John	123456	10.25	06/01/2010	04	04			v67.9				x
3	x	x	Doe, Roy	567890	0.72	06/05/2010	04	04			-	06/30/2010	01		
4			Smith, Jane	901234	0.25	04/01/2009								x	
5			Smith, John	345678		10/27/2009									

P3-3: Above is a picture of a completed CORE data portion of a June 2010 Monthly Client Service Report.

	CONSUMER INFORMATION						OPENING INFORMATION					CLOSING INFORMATION							
Data Row	New	Close	Client Name (Last, First M.I.)	Client Number	Units	Starting Date	Target Group	Client Characteristics 1st	2nd	3rd	Diagnosis	Closing Date	SPC End Reason	Closing Statuses A	F	SG	E	LA	AR
1		x	Doe, Jane	789012	0.75	12/15/2008						06/21/2010	06						
2	x		Doe, John	123456	10.25	06/01/2010	04	04			v67.9								
3	x	x	Doe, Roy	567890	0.72	06/05/2010	04	04			-	06/30/2010	01	1	3	3	8	07	00
4			Smith, Jane	901234	0.25	04/01/2009													
5			Smith, John	345678		10/27/2009													

P3-4: Above is a picture of a completed AODA data portion of a June 2010 Monthly Client Service Report.

To ensure the accuracy of the data, previously closed clients must be removed, new clients must have the appropriate opening information entered, and those clients closing in the current month must have the appropriate closing information entered. Listed below are the steps for entering data month to month

Removing previously closed clients

1. Look at the **Close** field of the row for an “x” indicator. (There is one client closed in picture P3-3.)
2. Select the row by clicking any cell anywhere within the row.

3. Click the *Delete Row* (Delete Row) button. You will be prompted to confirm deletion of the row.
4. Click *YES* to confirm deletion of the row.
5. Repeat process for every “x” indicator within the **Close** field.
6. Change the **Report For** field in the provider section to the current reporting month.

Required data for all clients (Consumer Information section)

CONSUMER INFORMATION					
New	Close	Client Name (Last, First M.I.)	Client Number	Units	Starting Date
	x	Doe, Jane	789012	0.75	12/15/2008
x		Doe, John	123456	10.25	06/01/2010
x	x	Doe, Roy	567890	0.72	06/05/2010
		Smith, Jane	901234	0.25	04/01/2009
		Smith, John	345678		10/27/2009

P3-5: A picture of the Consumer Information section from picture P3-3 and P3-4.

There are four things that are required for all clients whether they are opening, already exist, or are closing.

User entered fields:

1. **Client name**: This should be in Last Name, First Name M.I. (e.g. Doe, Jon Q) format for sorting purposes. Each client should only be listed once per template.
2. **Client number**: This is the client number obtained from DCDHS Staff and is unique to a particular client. There should be no duplicate client numbers on the template.
3. **Units**: Enter the number of units of service delivered for the month. Units may be entered with up to two decimal places; i.e. 6.50 units. If no units were delivered in the reported month, the Units field may be left blank.
4. **Start date**: Enter the start date in mm/dd/yyyy format (e.g. 01/01/2010). The start date must stay until the service is closed out.

Formulated fields:

1. **New**: Marked if the month and year of the client starting date match the month and year of the report date
2. **Close**: Marked if there is a client closing date entered.

Opening a new client (Opening Information section)

OPENING INFORMATION				
Target Group	Client Characteristics 1st	2nd	3rd	Diagnosis
04	04			v67.9
04	04			-

P3-6: A picture of the Opening Information section from picture P3-3.

1. Click anywhere within the data portion of the "610_Form" worksheet.
2. Click the *Insert Row* (Insert Row) button.
3. **Target Group**: Valid values can be obtained by referencing the appropriate HSRS desk card. Target Group is required for all new clients being opened for the first time.
4. **Client Characteristics**: Valid values can be obtained by referencing the appropriate HSRS desk card. (There are fields available for one to three client characteristics. However, only the primary characteristic IS required.)
5. **Diagnosis Code**: Acceptable diagnosis codes are listed in the ICD-9-CM (found at http://icd9coding1.com) or the DSM-IV. If Diagnosis code is not required for a particular program, you may place a dash mark (-) in this field. Please contact your DCDHS Data Entry Contact if you have questions about Diagnosis Code.

Opening information is required in the month the client opens. If the providers choose to keep the data in the Opening Information section on a monthly basis, they may do so. However, once the client is opened, it is not necessary to retain this data.

Closing an existing client (Closing Information section)

CLOSING INFORMATION							
Closing Date	SPC End Reason	Closing Statuses A	F	SG	E	LA	AR
06/21/2010	06						
06/30/2010	01	1	3	3	8	07	00

P3-7: Closing Information for AODA Clients.

CLOSING/OTHER INFORMATION			
Closing Date	SPC End Reason	Income < $15K (x)	Living Alone (x)
06/21/2010	06	x	x
			x
06/30/2010	01		
		x	

P3-8: Closing Information for CORE Clients.

1. Enter in the **Closing Date** in mm/dd/yyyy format.
2. Enter in the **SPC End Reason** according to the HSRS desk card.
3. For AODA clients, if the SPC End Reason is 01, 02, or 03, enter in the **Closing Statuses**[6]. Below is a chart of closing statuses, the descriptions, and values to use for refusal to disclose by client.
4. For Senior Centers, the **Income < $15K** and **Living Alone** status fields should be entered where applicable and should be entered when a client opens.

Closing Status[6]	Closing Description	Refusal to give
A	Frequency of alcohol / drug use during two weeks prior to discharge.	9
F	Marital / family / interpersonal relationships or social support system.	9
SG		9
E	Employment status at discharge.	0
LA	Living arrangement at discharge.	99
AR	Number of arrests thirty days prior to discharge, or since admission if less than thirty days.	97

Once closed out, the client needs to be removed from the template the following month. (Please see the "Previously closed clients" section within this manual for information on how to do this.)

Checking and fixing errors

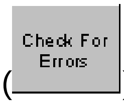
P3-9: Error message displayed when an error has been found following error check procedure.

The main objective of this template is to fix data accuracy issues, get a better grip on the actual data, and have a better understanding of the actual data being reported. That is why there is an extensive error checking system developed in the template. Follow these steps to check for errors.

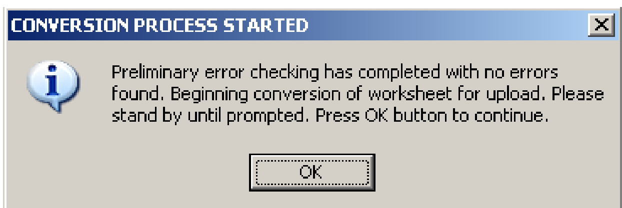
All errors must be cleaned up before submitting for processing.
* All numbers followed by an asterik (*) are WORKSHEET rows. All other numbers are to be considered DATA rows and can be found in column A of the worksheet.

DESCRIPTION	COLUMN	ROW *	NOTE
Invalid/Missing Field	N	3	The SPC END REASON is required when closing a client. Please refer to your HSRS Deskcard
Closing Status Required	O	3	The CLOSING STATUS: A is required when closing a client. Please refer to your HSRS Deskcard
Closing Status Required	P	3	The CLOSING STATUS: F is required when closing a client. Please refer to your HSRS Deskcard
Closing Status Required	Q	3	The CLOSING STATUS: SG is required when closing a client. Please refer to your HSRS Deskcard
Closing Status Required	R	3	The CLOSING STATUS: E is required when closing a client. Please refer to your HSRS Deskcard
Closing Status Required	S	3	The CLOSING STATUS: LA is required when closing a client. Please refer to your HSRS Deskcard
Closing Status Required	T	3	The CLOSING STATUS: AR is required when closing a client. Please refer to your HSRS Deskcard

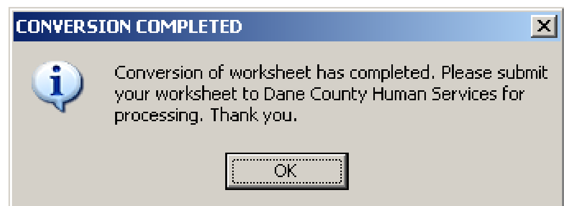
P3-10: Generated errors on the "Recorded_Errors" worksheet.

1. Enter all the data in the template for the current reporting month.
2. Click the *Check for Errors* (

) button on the top of the “610_Form” worksheet
3. The program will validate the data entered[7].
4. If an error occurred, a message box will be displayed. Click *OK*.
5. The “Recorded_Errors” worksheet will gain focus and display all errors on the template.
6. Fix the errors recorded.
7. Go to step 2 and repeat until all errors have been fixed.



P3-11: Message displayed following no errors found



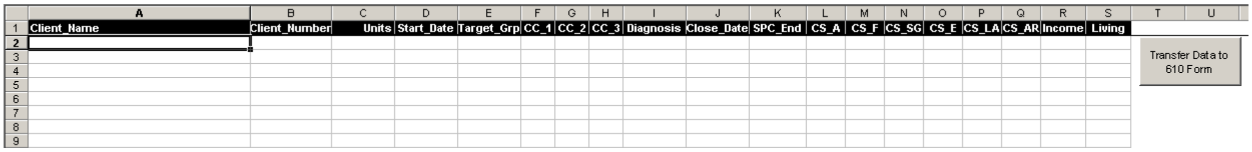
P3-12: Message displayed following data conversion

When the template is error free, a message box (p3-11) will display. Click the *OK* button and the conversion process will begin. Once the conversion is completed and a message box appears (p3-12), the calculations of the **census**, the **grand total** of units, the **execution date**, and the placement of the sixteen-row summary will be registered on the “610_Form” worksheet.

All errors must be corrected before the provider submits the template to their DCDHS representative. If the template still has errors when submitted, an error report will generate and the template, along with the error report, will be returned to the provider for corrections.

Due to size and speed restraints, a more extensive error checking process will be run once the providers have submitted their template. If additional errors occur, an additional worksheet in the workbook will be produced called “Upload_Errors”. The template will be returned to the providers for correction and **the providers must correct the errors before processing can complete**. Failure to do so will result in non-submission of the template for that month and may cause a delay in payment to the provider.

Importing data from a separate database



P3-13: A screen shot of the “Data_Import” worksheet. This worksheet is standardized for both templates.

There is a built-in process to easily transfer data from an existing database into the template. The following steps will transfer the provider’s data into the acceptable format needed by DCDHS Staff to process the template:

1. Create a data grid[8] with the following columns in order:
   a. Client Name
   b. Client Number
   c. Units
   d. Start Date
   e. Target Group
   f. Client Characteristic 1
   g. Client Characteristic 2
   h. Client Characteristic 3
   i. Diagnosis
   j. Closing Date
   k. SPC End Reason
   l. Closing Status A (AODA)
   m. Closing Status F (AODA)
   n. Closing Status SG (AODA)
   o. Closing Status E (AODA)
   p. Closing Status LA (AODA)
   q. Closing Status AR (AODA)
   r. Income less than $15k (Senior Centers)
   s. Living Alone (Senior Centers)
2. Copy the grid.
3. Paste the grid without column headers on the “Data_Import” worksheet in the template by placing the cursor in cell A2 clicking Ctrl + V on the keyboard.
4. Click the *Transfer Data to 610 Form* () button on top of the worksheet.
5. Follow the steps listed under the “Checking and fixing errors” section starting at step 2.

Saving the template from month to month

Each template will only hold one month worth of data. As such, each month a new form will need to be entered and saved. To save your data, it is recommended that you follow the steps below to save a history of data submitted to DCDHS.

1. Create a directory for all your templates on your hard drive
2. Open the template and go to FILE → SAVE AS…
3. Change the name to the month you wish to report for using a name different than you previously have used.
4. Click the SAVE button.
5. Enter in template information and run error checking process.
6. Once completed, make sure you SAVE the current changes.

Following these steps will ensure that your data has safely been saved to your hard drive and you will be able to pull up an old form if necessary.

Making revisions to previously submitted months

Occasionally, their maybe changes to data following submission to Dane County Department of Human Services. It is up to the provider to make these changes on the correct month template and re-submit the entire template to their correct data entry staff. Any and all changes need to be made in a timely fashion.

Any changes made to the template should be highlighted using the *Highlight Row* (

) button on top of the worksheet. This will signify to the data entry personnel where the changes are and make processing more efficient. Once completed, please do not forget to click the *Remove ALL Highlights* (

) button before filing the next month's data.

Once year-end data has been submitted to the state, revisions for that year will not be accepted. Continued abuse and failure to submit accurate data may lead to payments being withheld from the providers agency and may result in action by the contract manager.

Transferring data to a newer template version

Periodically, the State or County will require new reporting criteria. When this occurs, the data on the existing template will need to be moved to the latest template. E-mail will go out to all providers advising when the latest version of the template is available for downloading and reporting. Follow the steps below to transfer data to the newer template.

1. Open up the older version of the template containing the reporting data.
2. On the worksheet entitled “610_Form” or the worksheet with the most current information stored on it, select the cell under column **D** in data row **1**.
3. Using the scroll bars on the side of the worksheet, scroll down to the last data row of information.
4. Hit and hold the *SHIFT* key on the keyboard.
5. Using the mouse, select the cell under column **N** (column **S** for AODA form) in the **last data row** of information.
6. Release the *SHIFT* key.
7. Copy the data by pressing *CTRL+C* or going to the *Edit* menu and selecting *Copy* from the toolbar.
8. Open up a copy of the newest template that was either downloaded or given to you by DCDHS staff.
9. Go to step 3 of “Importing data from a separate database” section and follow the instructions.

IV. Submitting Templates to DCDHS Staff

E-mailing the template

Once the monthly data has been entered and all errors have been corrected, follow these steps to send the template to a DCDHS Staff member.

1. Create a new e-mail.
2. In the subject line, type: *DCDHS program number* 610 Form *reporting for month and year* (e.g. 9999 610 Form December 2005)
3. If you wish to include a message, please do so.
4. Attach the 610 Form template from your local drive.
5. Type in the e-mail address of your DCDHS Staff member.
6. Send the e-mail.

If the template is error free and there are no other problems, the DCDHS data entry staff will process the template. However, any attempt to alter the original formatting, such as changing the tab names, tab orders, formulas, formatting, general structure, etc., or submitting the template with errors will result in the template being rejected from the system. The rejection of the template may then result in a delay in processing of the template and consequently, a withholding of funds.

Submittal checklist and late templates

DCDHS staff must report to various State agencies in a timely manner. Therefore we must require our providers to submit their information in time for us to process it and re-submit to those agencies. Monthly reports for **January through November are due on the 10th of the following month** (ex. A report for January would be due on February 10th). Monthly reports for **December are due no latter than January 5th**. Failure to report on time may result in the provider's funding being delayed.

All reports should be done in their entirety. Please do not send a partially finished report, as it will be rejected by our system. If a report is going to be late for any reason, please contact your DCDHS Staff by telephone AND by an e-mail message stating the reason for tardiness.

Following is a simple checklist that needs to be completed before sending your report for submittal

1. The report has all the provider information entered including contact information for the person preparing the report.
2. The report has the correct reporting date on the form.
3. The report has been completed in its entirety.
4. The report does not contain any errors.

V. Reporting from a Macintosh Computer

Currently, the template is not supported by Macintosh computers. However, users with a Macintosh computer may still submit electronically to DCDHS Staff. In order to do so, they will have to create a tab-delimited text file following the structure set forth by the IMPORTING DATA FROM A SEPARATE DATABASE section, step 1. Once you have the tab-delimited text file, simply follow the steps in SUBMITTING TEMPLATES TO DCDHS STAFF. If you have any questions, please contact your DCDHS Data Entry personnel for assistance.

VI. Appendix A – User's Quick Guide

Reporting for the first time

1. Download the template or contact DCDHS Staff to receive template.
2. Contact DCDHS Staff to receive DCDHS Program #, DCDHS Provider #, and DCDHS Data Entry Contact.
3. Click the *Change/Change* Button
4. Enter in provider information
5. Enter in user who prepared the template information
6. Enter in data following either the month-to-month manual reporting or the importing from an outside database section

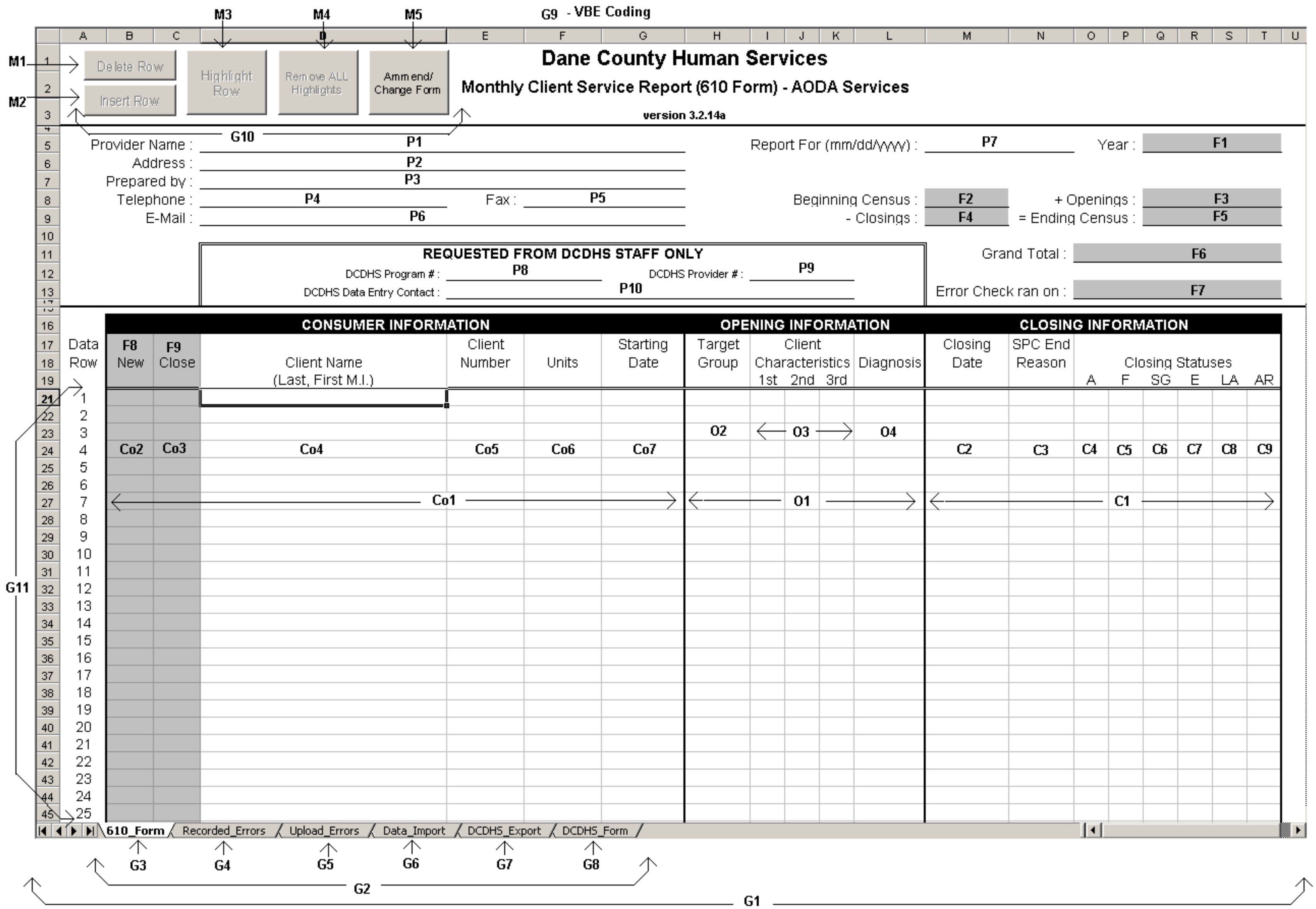
Month-to-month manual reporting

1. Delete the previously closed clients from the previous month.
2. Change the Report For cell to the following month.
3. Select the data portion of the form and begin entering data.
4. If client is already open, go to step 10.
5. If client is closing, go to step 9.
6. Click the Insert Row button.
7. Enter in the Opening Information.
8. Go to step 10.
9. Enter in the Closing Information.
10. Enter in the Consumer Information.
11. Go to next client.
12. Repeat steps 4 through 10 for remaining clients.
13. Click the Check for Errors button.
14. Clear any listed errors.
15. Submit to DCDHS Staff.

Importing from an outside database

1. Create a query for the database the information is stored in.
2. Copy the data from the query excluding headers.
3. Paste the information on the "Data_Import" worksheet.
4. Click the Transfer to 610 Form button.
5. Change the Report For cell to the next month.
6. Click the Check for Errors button on the "610_Form" worksheet.
7. Clear any listed errors.
8. Submit to DCDHS Staff.

VII. Appendix B – Template breakdown and terminology



P5-1: A picture of the “610_Form” template for AODA Service

General details of the template

G1 Workbook – The Excel definition of the template.

G2 Worksheets – Individual tabs found within the template.

G3 610_Form – Primary worksheet found in the template. All reporting must be done on this worksheet.

G4 Recorded_Errors – Worksheet used to list any errors found during the error checking process. All errors need to be corrected before submitting the worksheet.

G5 Upload_Errors – Worksheet used to list any errors that occur during the automated upload phase. This error checking is more extensive that the error checking recorded on the Recorded_Errors worksheet.

G6 Data_Import – Worksheet used to import data into the "610_Form" worksheet from an outside database.

G7 DCDHS_Export– Hidden worksheet used in the automated upload for DCDHS Staff only. Providers will not be able to access this worksheet for changes.

G8 DCDHS_Form – Hidden worksheet listing the provider information used in the automated upload for DCDHS Staff Only. Providers will not be able to access this worksheet for changes.

G9 VBE Coding (Hidden)– The computer language behind the error checking process and other features. The user will not be able to see this.

G10 Macro Button – When selected, the VBE code executes specific procedures.

G11 Data Row – The row number in the data portion of the template.

Detail of Provider Section

P1 Provider Name (Required) –Name of the provider reporting the services is entered here.

P2 Address (Required) – Provider address is entered here.

P3 Prepared by (Required) – The name of the employee responsible for completing the form.

P4 Telephone (Required) – This is the telephone number of the employee who prepared the form. Needs to be in (###) ###-#### format.

P5 Fax (Optional) – This is the fax number of the employee who prepared the form. Needs to be in (###) ###-#### format.

P6 E-Mail (Optional) – This is the email address of the provider employee who prepared the form.

P7 Report For (Required) – The month and year for which services are being reported. Must be in mm/dd/yyyy format.

P8 DCDHS Program Number (Assigned by DCDHS) – The number assigned to identify the type of program services are being delivered for. Assigned by DCDHS only.

P9 DCDHS Provider Number (Assigned by DCDHS) – The number assigned to identify the agency, facility, or person that is delivering the service to the client. Assigned by DCDHS only.

P10 DCDHS Data Entry Contact (Assigned by DCDHS) – The data entry staff at Dane County Department of Human Services that is responsible for data entry of template. Assigned by DCDHS only.

Detail of Locked Formula Cells

F1 Year – A formula cell that computes the year from the report date entered.

F2 Beginning Census – A formula cell that totals the number of client numbers on the form and subtracts the number of openings for the given month. This should match the previous month's new census.

F3 Openings – A formula cell that totals all clients being opened for the given month based upon the report date entered.

F4 Closings – A formula cell that totals all clients being closed for the given month based upon the report date entered.

F5 Ending Census – A formula cell that uses the beginning census, adds the clients who are opening, and subtracts the clients who are closing for the month. The resulting number should always be used for the next month's beginning census.

F6 Grand Total – A formula cell that displays the total number of units being reported.

F7 Error Check ran on – A date field that displays the date and time the *Check for Errors* button was pressed when no errors where found.

F8 New – A text field that displays an "X" when the client is a new client for the reported month. This field is based upon the Report For field and compares the Starting Date field to determine if it is new for the given month.

F9 Close – A text field that displays an "X" when the client is closing for the reported month. This field is based upon the Closing Date field and is entered when a closing date is entered.

Detail of Consumer Information Section

Co1 Consumer Information – This section of data is required at all times by the user or provider preparing the form.

Co2 Open – A formula cell that inserts an "x" in the column if the client has an open date entered during the report month.

Co3 Close – A formula cell that places inserts an "x" in the column if the client has a closed date entered during the report month.

Co4 Client Name – The full legal name of the client starting with last name.

Co5 Client Number (Assigned by DCDHS) – A client specific number assigned to each individual for whom services are being reported.

Co6 Units – The service units provided to a client for the reporting month.

Co7 Starting Date – The date when the client began contact with the agency or the case was opened for this period of service. Must use mm/dd/yyyy format (e.g. 01/01/2007).

Detail of Opening Information Section

O1 Opening Information – Entering data into this section of the form is only required when a client is being opened for a new service.

O2 Target Group – Indicates the more specific need and/or problem that best describes the primary reason this client is receiving services in a particular program.

O3 Client Characteristics – Describes the client according to selected personal, social, and demographic factors. Only the primary characteristic is required when reporting.

O4 Diagnosis – The current diagnosis of the client's condition.

Detail of Closing Information Section

C1 Closing Information – Entering data into this section of the form is only required when a client is being closed for a service.

C2 Close Date – The date in which service for this client ended. Must use mm/dd/yyyy format (e.g. 01/01/2007).

C3 SPC End Reason – The reason the client was discharged from the service.

Closing Information Required for AODA Services

C4 Closing Status A – The frequency of alcohol / drug use during two weeks prior to discharge.

C5 Closing Status F – The marital / family / interpersonal relationships or social support system at discharge.

C6 Closing Status SG – The support group attendance 30 days prior to discharge, or since admission if less than 30 days.

C6 Closing Status E – The employment status at discharge.

C7 Closing Status LA – The living arrangement at discharge.

C8 Closing Status AR – The number of arrests that occurred in the past 30 days prior to discharge, or since admission if less than 30 days.

Closing Information Required for Non-AODA Services

(Not listed in picture)

C9 Income < $15K (Required for Senior Centers and Elderly Agencies) – If the client has an income less than fifteen thousand, an “X” should be placed in this column.

C10 Living Alone (Required for Senior Centers and Elderly Agencies) – If the client is living alone, an “X” should be placed in this column.

Detail of Macro Buttons

“610_Form” worksheet macro buttons

(Only works following the *Change/Change Form* button being pressed)

M1 Delete Row – This button removes the line of data where the current cell is selected. Only works in the data portion of the template.

M2 Insert Row[9] – This button inserts a new line of data with the formulas entered in the locked cells. Only works in the data portion of the template.

M3 Highlight Row – This button highlights a row of data in case of need for a revision. Can also be used to remove a single line of highlighted data.

M4 Remove ALL Highlights – This button removes all highlighted data.

M5 Check For Errors (Not pictured) – This button begins the error checking process and creates the automated worksheets.

“Database Import” worksheet macro button

(Not listed in picture)

D1 Transfer Data to 610 Form – This button transfers a user created grid from the “Database_Import” worksheet to the “610_Form” worksheet

VIII. Appendix C – Valid Data Entries

Provider Information

Field	Valid Data
Provider Name	Legal name given to the agency, company, or organization reporting the data. May contain the program name as well.
Address	Actual address that the agency, company, or organization is located at for this particular program.
Prepared by	The full name of the person (and how they would like to be referred to as) for the person who prepared the template.
Telephone	The telephone or contact number of the person who prepared the template. Include extensions if necessary
Fax	The fax number that a template can be sent to or any information necessary for completion of the template.
Email	The email address of the person who prepared the template.
DCDHS Program Number	The number assigned to the program by DCDHS Staff
DCDHS Provider Number	The number assigned to the agency, company, or organization by DCDHS Staff
DCDHS Data Entry Contact	The personnel at DCDHS that is assigned as a contact for questions regarding the template.
Report For	The month in which the data occurred. Must be in mm/dd/yyyy (01/01/2009) format.

Data Entry Values

Column	Field	Valid Data
D	Client Name	The legal name of the client. No nicknames will be accepted
E	Client Number	The number given by DCDHS staff. This MUST match or information will not be stored for correct client.
F	Units	Any number carried out to two decimal places for service units in the given month (non-cumulative for year).
G	Starting Date	A date value in the format mm/dd/yyyy. (03/05/1979)
H	Target Group	Any two-digit number according to the appropriate desk card.
I – K	Client Characteristics	Any two-digit number according to the appropriate desk card. Only primary characteristic is required.
L	Diagnosis	Any value accepted by the ICD-9-CM (found at http://icd9coding1.com) or the DSM-IV.
M	Close Date	A date value in the format mm/dd/yyyy. (03/05/1979)
N	Close Reason	Any two-digit number according to the appropriate desk card.

AODA Clients Closing Statuses Only[10]		
O	A	A single digit value found on the AODA desk card. (1-5)
P	F	A single digit value found on the AODA desk card. (1-5)
Q	E	A single digit value found on the AODA desk card. (1-9)
R	LA	A two-digit value found on the AODA desk card. (01-07)
S	AR	A two-digit value.

IX. Appendix D – Frequently Asked Questions

Q1. What is the 610 Form?

A1. The 610 Form is a reporting tool used to collect data on services performed by providers. It is reported to all governmental agencies to help determine proper course of action in the community.

Q2. How do we know what our requirements are?

A2. The Purchase of Service agency contract specifies the reporting requirements. These are formulated by County, State, and Federal guidelines.

Q3. What are the requirements used for?

A3. These requirements are used in reporting to the state on the individual clients that the provider is serving, the services that are provided, and the expense of such services. It is also used to provide accountability to the Department of Human Services, elected officials, and the public that funds are being effectively and efficiently used in meeting the needs of consumers.

Q4. Why do we have to report this information?

A5. Much of the state and federal funding is either directly or indirectly determined by what is reported on this form. Millions of dollars of the federal funding used to serve clients is contingent upon this reporting.

Q6. Why do we have to use THIS form?

A6. State mandated reporting guidelines and timelines are becoming stricter. In an effort to more accurately report data and avoid State imposed penalties, we have initiated an automated process whereby our system processes data more efficiently and accurately. This form is a crucial step in that process. It is necessary to use this form to increase efficiency and to have a universal standard for reporting.

Q7. My buttons don't work at the top. What is wrong?

A7. The buttons will only work if the security setting for Macros is set correctly. Please see the section entitled "Enabling Microsoft Excel active buttons" on how to set your security level to the appropriate level.

Q8. The census is not correct at the top of the form *or* the census does not add all the clients entered.

A8. The census is based upon the **Client Numbers**, as that is the primary form of reporting. If there is no **Client Number** entered, that client will not be added and an error will be flagged. Please insert the correct **Client Number** for each client.

Q9. An "x" doesn't appear in the open column when I enter the date.

A9. First, check to see if the correct reporting month is entered. If it is correct, then the **Starting Date** entered is not in the current month for reporting. If this client was to be opened in the previous month, please re-submit the previous month with the new information.

Q10. I get #### signs across the open column on the form.

A10. The **Report For** date was entered incorrectly. It must be in mm/dd/yyyy format to register correctly.

X. Appendix E – References

[1] There are currently 2 forms that a provider can use, AODA and CORE. If you are unsure of which form to use, please contact your DCDHS Data Entry Personnel or Contract Manager for clarification.

[2] There is a fourth setting in MS Excel 2003 and above called "**Very High**". Regardless, it should be set for "**Medium**".

[3] If the security level is set to "Low", there will be no message prompt during startup. It is recommended the level be set to "Medium".

[4] Before changing the Report For field, please see the section "Removing previously closed clients"

[5] Periodically, due to contract and/or personnel changes, the DCDHS Program Number, DCDHS Provider Number, and DCDHS Data Entry Staff may change.

[6] AODA closing statuses are required for all AODA services that have an SPC End Reason of 01, 02, or 03

[7] The monitor screen may temporarily flicker during this process as it checks all the information on the form. It will eventually return to normal.

[8] All grids must have columns A – K. AODA clients must also have columns L – Q and Senior Centers should include columns R and S.

[9] The row is inserted above the currently selected cell on the worksheet. It is not necessary to worry about alphabetical order, as the form will alphabetize for the user.

[10] For specific headers and values, please see the "Closing an existing client" section.