

STEP-BY-STEP INSTRUCTIONS TO CREATE REPORTS

To access the DHCS Performance Dashboard AB 470 Report Application, go to the following link:

➤ **STEP ONE:**

- ✓ **Hold down the Ctrl button on the bottom left of your keyboard and Select the following link:**
<https://data.chhs.ca.gov/dataset/adult-ab470-datasets/resource/c1908f78-3716-4b91-8afa-0dc9c3c2058a>

➤ **STEP TWO:**

- ✓ **Select the “Download” button** Once you Select download, then wait as the tool is loading, it may take a minute or two.

The screenshot shows a web browser window displaying the CHHS Open Data website. The page title is "Performance Dashboard AB 470 Report Application". A blue "Download" button is visible. Below the title, there is a URL: <https://data.chhs.ca.gov/dataset/6a24bfe9-5de9-4c9a-8972-6e368455ac3a/resource/c1908f78-3716-4b91-8afa-0dc9c3c2058a/download>. A note states: "Note: This file is not machine readable, but can be downloaded and opened in Excel to be properly viewed. The Performance Dashboard AB 470 Report Application is a tool developed by the Mental Health Division of DHCS. The uses claims and utilization data for beneficiaries of Specialty Mental Health Services (SMHS) for children, youth and adults. The tool is a Microsoft Excel application that allows the user to build dynamic reports for specific demographic categories. The reports typically consists of a chart and associated tabular statistical data." Below the note, it says "There are no views created for this resource yet." At the bottom, there is a table with "Additional Information" and a "Resources" sidebar.

Field	Value
Last updated	March 22, 2019
Created	January 3, 2019
Format	XLSM

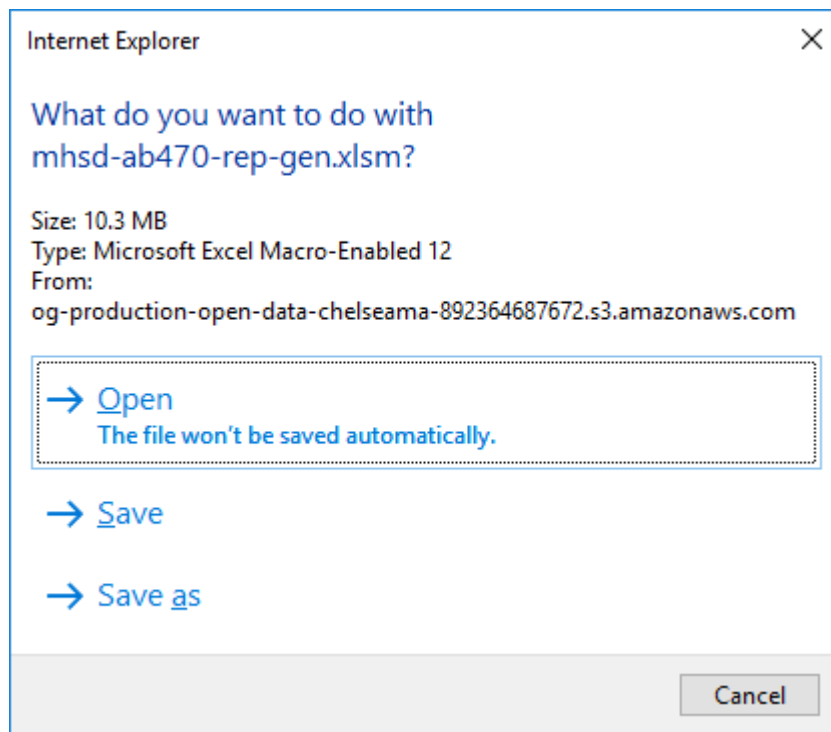
Resources

- Performance Dashboard ...
- Adult SMHS ...
- Adult Population ...
- Adult Population ...
- Adult Population ...
- Adults Entering ...

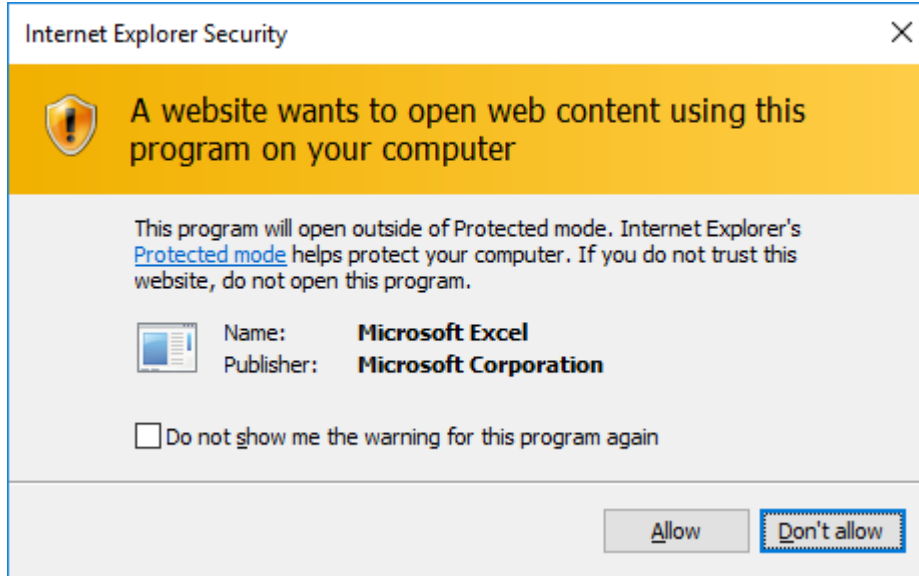
➤ **STEP THREE:**

- ✓ **See Bottom Left of Your Screen for Download Progress** – **When it finishes downloading :**
- ✓ **Select: Open File** (then wait as the tool is loading, it may take a minute or two. If you have Microsoft Excel Software on your computer, the file will open in an Excel Workbook).

OR You may see this message if so, **Select: Open**

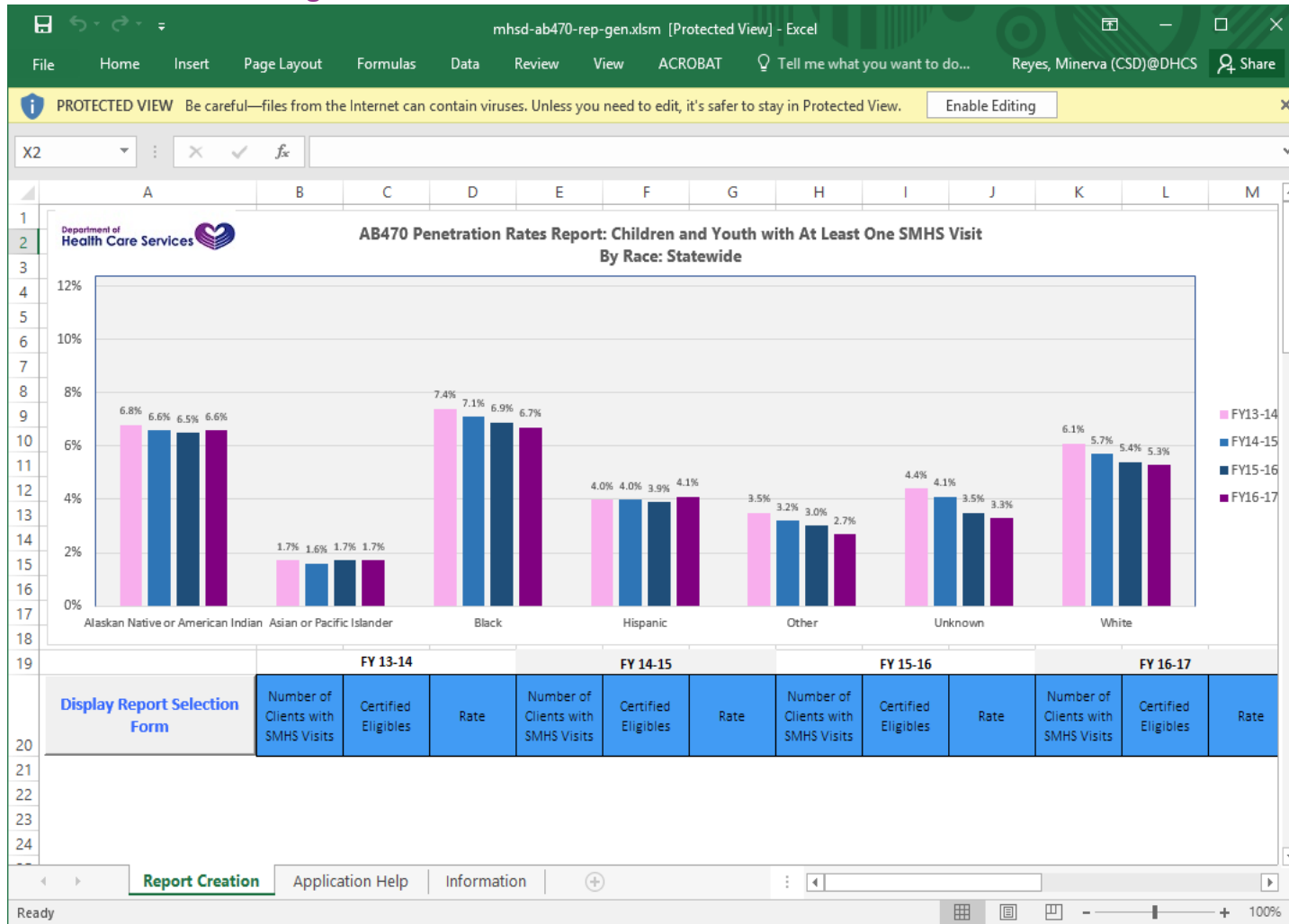


If you receive the following dialogue box, Press “Allow”. Then wait as the tool is loading, it may take a minute or two.



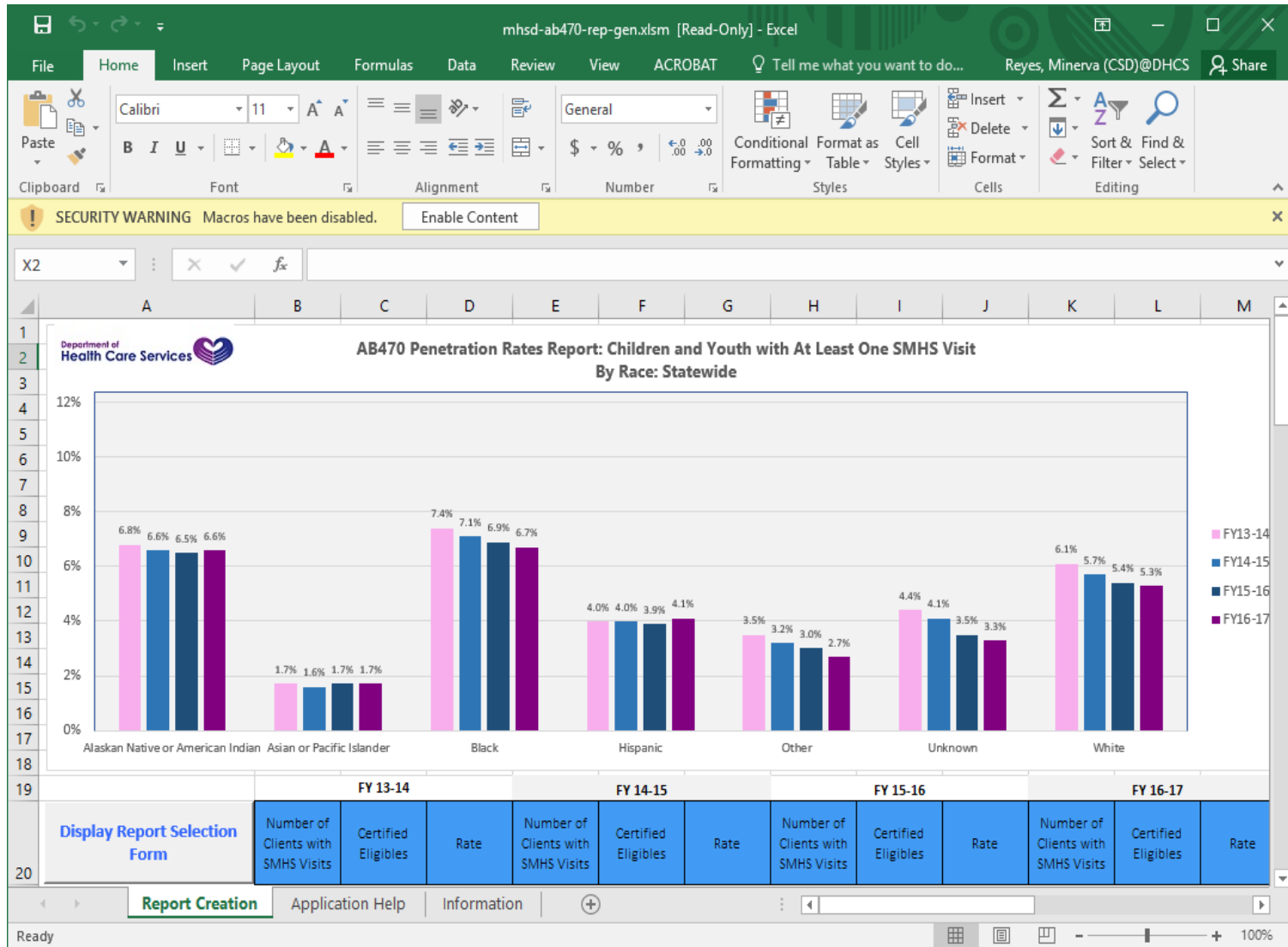
➤ **STEP FOUR::** When the file opens,

✓ **Select “Enable Editing”**. Then wait for it to load.



➤ **STEP FIVE:** When the Excel file opens,

- ✓ **Select “Enable Content”.** Then wait for it to Load:



Once the content is enabled, Table 1 Performance Selection Criteria will display.

This display provides you with a visual of the options that you will have available for your report.

➤ **Take a moment to review this display.**


You will now begin to select the criteria for the reports you would like to create.

TABLE 1:


NOTE: As you begin the next steps to create the reports you want, you will have some options where you can choose from and other options will automatically be chosen for you. Table 1 demonstrates: A Statewide SMHS Penetration/Engagement Rate report for Children and Youth with At Least One SMHS Visit For All Races, All Ages, All Sexes and All Fiscal Years From the MediCal System for Specialty Mental Health Services

➤ **STEP SIX:**

- ✓ **See Table 1 - Report Selection Criteria Pop-Up Window: Report Creation** (This is where you will decide what data you want your report to have).


- ✓ There are 5 report options under the **REPORT TYPE** **Select the Drop Down Menu**  **and Choose One** of the following report types based on the report you wish to create:
 - **MH Penetration/Engagement Rates**
 - **MH Time to Step-Down Services**
 - **MH Utilization Costs**
 - **MH Diagnosis Counts**
 - **MH Patient Usage**

➤ **STEP SEVEN:**


- ✓ **See Table 1 - COUNTY/POPULATION BASE** – **Select the Drop Down Menu**  **and Choose One**
 - **County** – You can **Select One** county name
 - **OR Region** – Small Rural **OR** Small **OR** Medium **OR** Large Counties
 - **OR Statewide**

➤ **STEP EIGHT:**


- ✓ **See Table 1 - DEMOGRAPHIC CATEGORIES** – **Select one of the Categories to Choose either:**


- ✓ **RACE** – If you chose RACE – To the Right you have REPORT SPECIFIC FILTERS - **Select the Drop Down Menu**  **and Choose One**
 - If you are creating MH Penetration/Engagement Rates Report – RACE will default to ALL RACES

 - If you chose any of the other 4 reports **listed in STEP ONE** then you will be able to **Choose One of Seven RACES**

- ✓ **AGE GROUP** – If you chose AGE GROUP - To the Right you have REPORT SPECIFIC FILTERS - **Select the Drop Down Menu**  **and Choose One**
 - If you are creating MH Penetration/Engagement Rates Report – AGE GROUP will default to ALL AGES

 - If you chose any of the other 4 reports **listed in STEP ONE** then you will be able to **Choose One of Five AGE GROUPS**

- ✓ **SEX** – If you chose SEX - To the Right you have REPORT SPECIFIC FILTERS - **Select the Drop Down Menu**  **and Choose One**
 - If you are creating MH Penetration/Engagement Rates Report –SEX will default to ALL SEXES
 - If you chose any of the other 4 reports listed in STEP ONE then you will be able to **Choose One of Two SEX**

- ✓ **LANGUAGE** – If you chose LANGUAGE – **Scroll down on the Drop Down Menu**  **and Select to Choose:**
 - If you are creating MH Penetration/Engagement Rates Report – You can **Select to Choose One language or up to Six LANGUAGES.**
 - If you chose any of the other 4 reports listed in STEP ONE then you will be able to **Choose One of 28 LANGUAGES.**

- **STEP NINE:**
 - ✓ **See Table 1 - POPULATION TYPE – Choose One:**
 - If you chose POPULATION TYPE - you have the option to **choose**
 - CHILDREN AND YOUTH
 - **OR ADULT**

- **STEP TEN:**
 - ✓ **See Table 1 - CHOOSE NUMBER OF MENTAL HEALTH VISITS (FISCAL YEAR) – Choose One**
 - If you are creating MH Penetration/Engagement Rates Report – you have the option to **choose:**
 - AT LEAST ONE MENTAL HEALTH VISIT
 - **OR FIVE OR MORE MENTAL HEALTH VISITS**
 - If you chose any of the other 4 reports listed in STEP ONE then this option is not applicable (N/A)

➤ **STEP ELEVEN:**

✓ **See Table 1 - MEDI-CAL DELIVERY SYSTEM – Select the Drop Down Menu  and Choose One**

- If you are creating MH Penetration/Engagement Rates **OR** MH Diagnosis Counts **OR** MH Patient Usage Report – you have the option to **choose**:
 - **SPECIALTY MENTAL HEALTH SERVICES**
 - **OR MANAGED CARE**
- If you chose MH Time to Step Down Services **OR** MH Utilization Costs listed in STEP ONE then the report will default to Specialty Mental Health Services

➤ **STEP TWELVE:**

✓ **See Table 1 - FISCAL YEAR –(STATE FY runs 7/1 thru 6/30) – Select the Drop Down Menu  and Choose One**

- If you are creating MH Penetration/Engagement Rates **OR** MH Time to Step Down Services **OR** MH Utilization Costs Report – the report will default to All Fiscal Years
- If you choose MH Diagnosis Counts or MH Patient Usage – then **Choose** FY 14-15 **OR** FY15-16 **OR** FY 16-17 **OR** FY 17-18

➤ **STEP THIRTEEN:**

✓ **See Table 1 - CREATE REPORT:**

- **SELECT**  **TO DISPLAY YOUR NEWLY CREATED REPORT**

➤ **STEP FOURTEEN:**

✓ **See Table 1 - PRINT REPORT:**

- **SELECT**  **TO PRINT YOUR NEWLY CREATED REPORT**

➤ **STEP FIFTEEN:**
✓ **TO SAVE REPORT:**

- **In Excel - SELECT FILE – SAVE AND CHOOSE A NAME FOR YOUR REPORT - THEN SELECT SAVE**

➤ **Need More Information:**

The Excel File you have just created has the following 3 TABS:

Report Creation – Displays a visual of the report that you create

Application Help – Provides Overview and Features of the various report types that can be created

Information – Provides background, Purpose and Overview of Assembly Bill 470