

## XIV. Data Tracking Report and Data Error Summary Sheets

*Please note: Data Tracking and Data Error Summary Sheet activities are pending final budget negotiations for the 2009-2011 biennium.*

### Data Tracking Report

The Data Tracking Report lists forms that are overdue (based on the start of the Fiscal Year) as well as forms that are coming due in approximately the next three months. The report is an Excel file that lists the program county, worker ID, worker name, child ID, child's date of birth, the name of the survey, the target date (date the form was/is due) and the due status (due or overdue). A "notes" column is provided for program record keeping. Because this report is provided to you in Excel format, it can be sorted and manipulated by you to best meet your local needs. The following is an example of a Data Tracking Report Excel file created in April 2008:

	A	B	C	D	E	F	G	H	I	J
1	County	Wkr ID	Wkr Name	Child ID	DOB	Survey Name	Target Date	Due Status	Notes	
2	CountyName		WorkerName1	9735197	15-Mar-08	Parent Survey I (0 mo.)	15-Mar-08	Overdue		
3	CountyName	24	WorkerName1	9123516	24-Mar-06	12 & 24 HOME (24 mo.)	24-Mar-08	Overdue		
4	CountyName	24	WorkerName1	9123516	24-Mar-06	Family Update (24 mo.)	24-Mar-08	Overdue		
5	CountyName	24	WorkerName1	9123516	24-Mar-06	Parent Survey A (24 mo.)	24-Mar-08	Overdue		
6	CountyName	24	WorkerName1	9123516	24-Mar-06	Parent Survey B (24 mo.)	24-Mar-08	Overdue		
7	CountyName	83	WorkerName2	9353214	03-Jun-03	36, 48, 60 HOME (60 mo.)	03-Jun-08	Due		
8	CountyName	83	WorkerName2	9353214	03-Jun-03	Family Update (60 mo.)	03-Jun-08	Due		
9	CountyName	83	WorkerName2	9353214	03-Jun-03	Parent Survey A (60 mo.)	03-Jun-08	Due		
10	CountyName	83	WorkerName2	9353214	03-Jun-03	Parent Survey B (60 mo.)	03-Jun-08	Due		
11	CountyName	83	WorkerName2	9220642	24-Sep-06	Family Update (18 mo.)	24-Mar-08	Overdue		
12	CountyName	83	WorkerName2	9220642	24-Sep-06	Parent Survey A (12 mo.)	24-Sep-07	Overdue		
13	CountyName	83	WorkerName2	9220642	24-Sep-06	Parent Survey B (12 mo.)	24-Sep-07	Overdue		
14	CountyName	85	WorkerName3	9762035	23-Oct-04	36, 48, 60 HOME (36 mo.)	23-Oct-07	Overdue		
15	CountyName	85	WorkerName3	9762035	23-Oct-04	Family Update (36 mo.)	23-Oct-07	Overdue		
16	CountyName	85	WorkerName3	9762035	23-Oct-04	Family Update (42 mo.)	23-Apr-08	Overdue		
17	CountyName	85	WorkerName3	9762035	23-Oct-04	Parent Survey A (36 mo.)	23-Oct-07	Overdue		
18	CountyName	85	WorkerName3	9762035	23-Oct-04	Parent Survey B (36 mo.)	23-Oct-07	Overdue		
19	CountyName	85	WorkerName3	9255349	26-Mar-07	12 & 24 HOME (12 mo.)	26-Mar-08	Overdue		
20	CountyName	85	WorkerName3	9255349	26-Mar-07	Family Update (12 mo.)	26-Mar-08	Overdue		
21	CountyName	85	WorkerName3	9256666	28-Nov-06	Family Update (18 mo.)	28-May-08	Due		
22	CountyName	85	WorkerName3	9591742	09-Nov-07	Family Update (6 mo.)	09-May-08	Due		
23	CountyName	85	WorkerName3	9591742	09-Nov-07	Parent Survey A (6 mo.)	09-May-08	Due		
24	CountyName	85	WorkerName3	9591742	09-Nov-07	Parent Survey B (6 mo.)	09-May-08	Due		
25	CountyName	89	WorkerName3	9502819	23-Oct-07	Family Update (6 mo.)	23-Apr-08	Overdue		
26	CountyName	89	WorkerName3	9502819	23-Oct-07	Parent Survey A (6 mo.)	23-Apr-08	Overdue		

**Timing of Tracking Reports:** The Data Tracking Report is produced twice a year and emailed to programs approximately 45 days after the end of Quarter 2 (December) and Quarter 4 (June). A cover letter accompanies each Data Tracking Report describing the date parameters for forms that are overdue and/or coming up due in the next several months.

**What to do with the Tracking Report:** The Data Tracking Report is designed to help programs:

1. Track upcoming forms due for Intensive Service families
2. Alert staff to forms that were missed or are overdue

The Tracking Report is primarily for your program’s record keeping and use. Some programs have one central staff person monitor the entire report, while others separate the report by worker and have each worker responsible for monitoring his or her report.

In addition to program record keeping, programs can use the report to communicate with NPC about data on the report by writing comments/questions in the “notes” column of the electronic excel file. Some examples of information you may want to communicate to us:

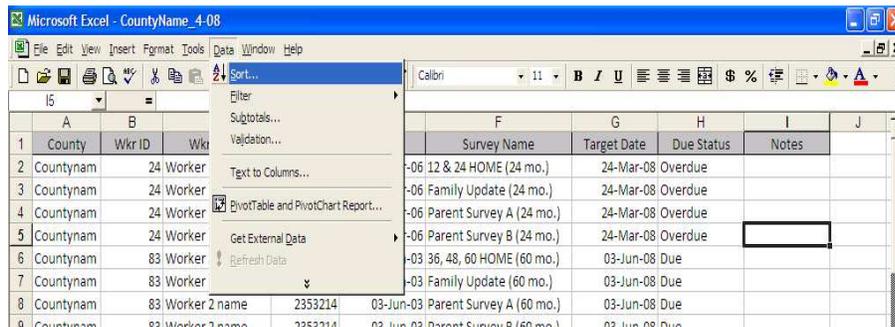
1. A worker missed a form for a family and it’s too late to complete it
2. A parent declined to complete a Parent Survey
3. A child ID on your report should have been exited the home visitor can’t remember if the exit form was sent in
4. The program previously sent in an overdue form, but feel you put the wrong ID number on the form
5. A worker is unable to find a Child ID she is expecting to see on the report

Notes entered on the electronic Excel file should be sent to [snoddy@npcresearch.com](mailto:snoddy@npcresearch.com) within one month of receiving the report. NPC will update your data and help you resolve your data questions.

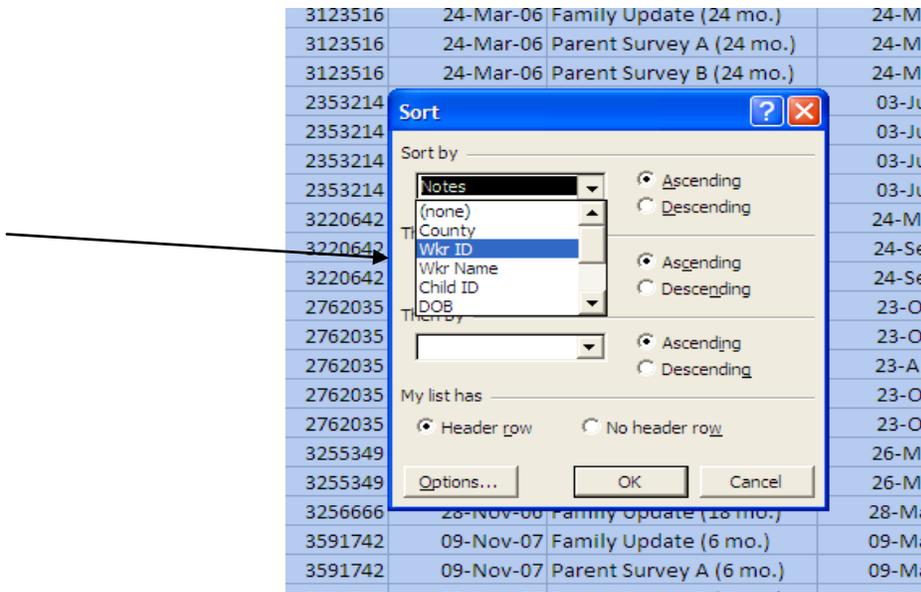
### ***Sorting and Filtering the Tracking Report***

***Sorting:*** You can sort an Excel file by any of the columns in the file. For instance, in the Data Tracking report, you may wish to sort the file by Worker ID.

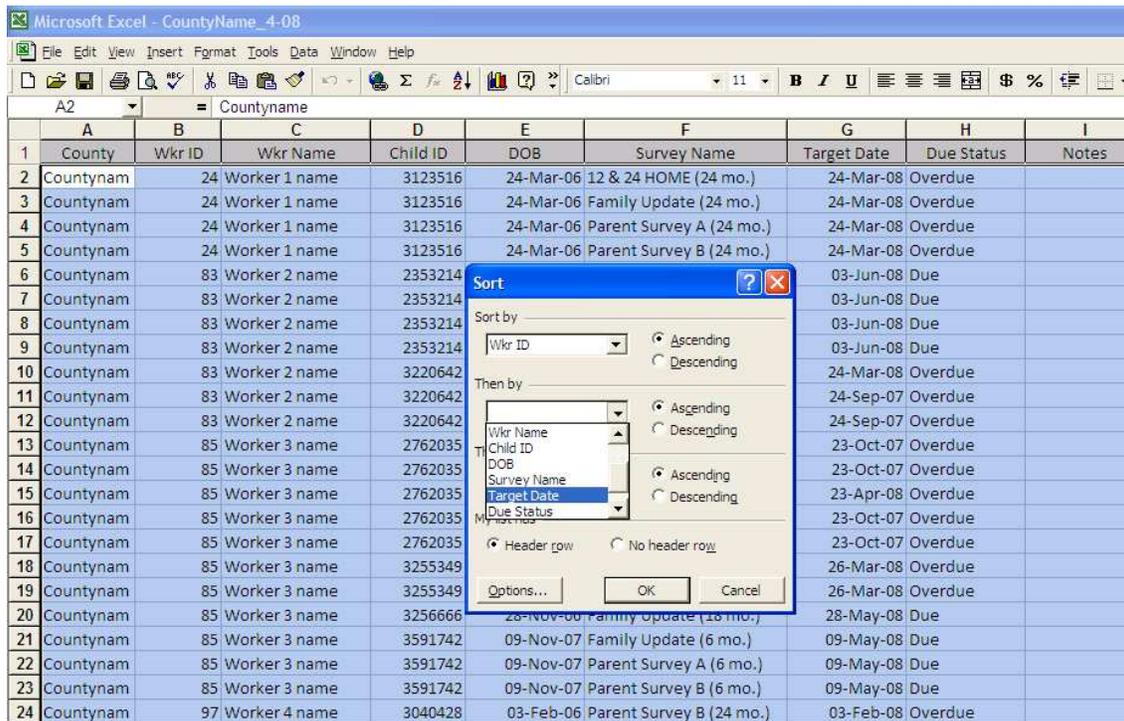
1. With the Excel file open, from the toolbar, select “Data” then “Sort.”



2. In the dialogue box that comes up after selecting “Sort” you will see a list of variables in the excel file you have open. Choose the variable you want to sort by (in this example, Wkr ID). Next, press “OK”; your document will then sort in ascending order by worker ID.

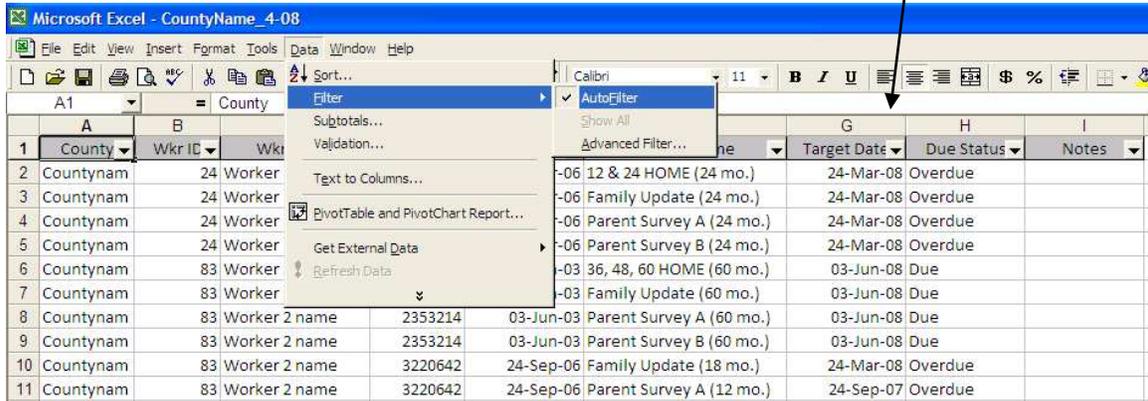


3. If you want to sort by more than one item, you would continue to add variables as you did above. Using the drop down arrow, select the second item by which you wish to sort your document. In the example below, we are choosing “Target Date” as a second sort option.

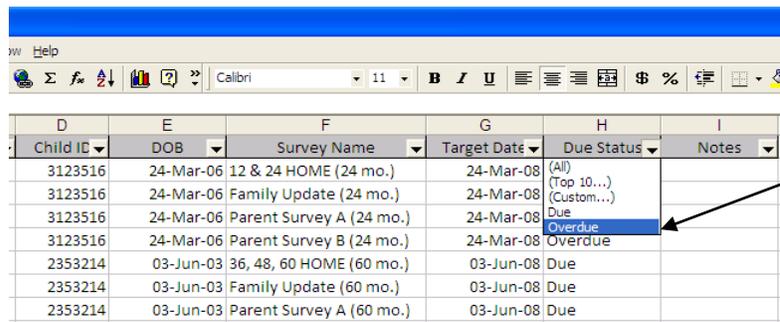


**Filtering:** You should use caution when using filter because it will temporarily eliminate (hide) the data you don't want to see. You should either “Save As” a copy of the report before you do this or filter your report, print off what you need, and then close the document WITHOUT saving it.

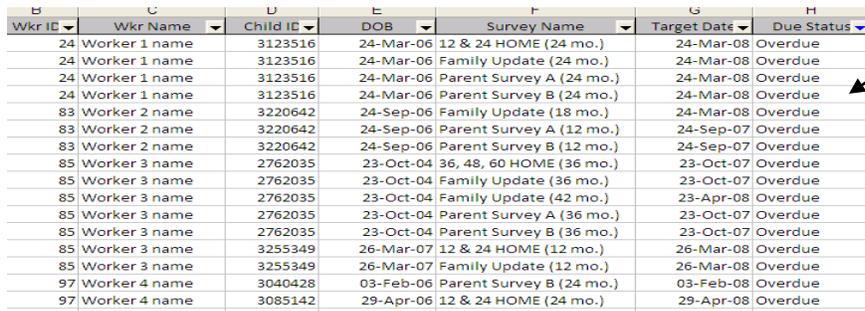
1. If, for instance, you only want to see overdue forms in your spreadsheet, from the toolbar, select “Data” then “Filter”, then “AutoFilter.” This will add down-arrows to each of the variables in your excel file.



2. Next, select the down arrow of the variable you are interested in filtering on. In this case, “Due Status.” You will then see the options under that variable. Select “Overdue.”



3. All of the “Due” forms in your report will temporarily drop out, leaving only the “Overdue” forms for you to view (see below). If you’ve saved an original copy of your report somewhere else, saving the file with this filter will save only the overdue forms. If you haven’t saved a copy of your report, don’t save the filter or else you will lose all of the data you filtered out (any data that didn’t have an “overdue” status).



- If you wanted to filter within the overdue forms (for example, by worker), you would then click on the “Wkr Name” drop down box, and select the name of the worker of interest (in this example, Worker 1 name).

	A	B	C	D	E	F	G	H
1	County	Wkr ID	Wkr Name	Child ID	DOB	Survey Name	Target Date	Due Sta
2	Countynam	24	(All)	3123516	24-Mar-06	12 & 24 HOME (24 mo.)	24-Mar-08	Overdue
3	Countynam	24	(Top 10...)	3123516	24-Mar-06	Family Update (24 mo.)	24-Mar-08	Overdue
4	Countynam	24	(Custom...)	3123516	24-Mar-06	Parent Survey A (24 mo.)	24-Mar-08	Overdue
5	Countynam	24	Worker 1 name	3123516	24-Mar-06	Parent Survey B (24 mo.)	24-Mar-08	Overdue
10	Countynam	83	Worker 2 name	3220642	24-Sep-06	Family Update (18 mo.)	24-Mar-08	Overdue
11	Countynam	83	Worker 2 name	3220642	24-Sep-06	Parent Survey A (12 mo.)	24-Sep-07	Overdue
12	Countynam	83	Worker 2 name	3220642	24-Sep-06	Parent Survey B (12 mo.)	24-Sep-07	Overdue
13	Countynam	85	Worker 3 name	2762035	23-Oct-04	36, 48, 60 HOME (36 mo.)	23-Oct-07	Overdue
14	Countynam	85	Worker 3 name	2762035	23-Oct-04	Family Update (36 mo.)	23-Oct-07	Overdue

- You will notice that your file now only shows the overdue forms for the worker you selected.

	A	B	C	D	E	F	G	H	I
1	County	Wkr ID	Wkr Name	Child ID	DOB	Survey Name	Target Date	Due Status	Notes
2	Countynam	24	Worker 1 name	3123516	24-Mar-06	12 & 24 HOME (24 mo.)	24-Mar-08	Overdue	
3	Countynam	24	Worker 1 name	3123516	24-Mar-06	Family Update (24 mo.)	24-Mar-08	Overdue	
4	Countynam	24	Worker 1 name	3123516	24-Mar-06	Parent Survey A (24 mo.)	24-Mar-08	Overdue	
5	Countynam	24	Worker 1 name	3123516	24-Mar-06	Parent Survey B (24 mo.)	24-Mar-08	Overdue	
43									
44									

- You may use the same process for filtering other variables (Wkr ID, Survey Name, etc), allowing you to filter out what’s best for your needs!

**Data Error Summary Sheets**

The Data Error Summary Sheet is sent electronically to program managers to help us communicate about forms and other data arriving at NPC that we are unable to process for a variety of reasons, including:

**Missing Data Elements:** We will not scan forms missing certain data fields used for linking, verifying, or reporting data. For a list of fields that must be present in order for forms to be scanned, see Chapter 5 of the Evaluation Manual.

**Incorrect Data:** We will not scan forms if we identify incorrect data. For instance, if we notice a Parent Survey I was completed at 6 months instead of a Parent Survey II, or the current date was

written in as a birth date on an 18 month form, we will bring it to your attention for correcting prior to scanning.

**NOTE:** Data corrections or communications to NPC should be made in a different colored font directly into the Data Error Summary document and emailed back to [snoddy@npcresearch.com](mailto:snoddy@npcresearch.com) by the 15th of the following month.

**Family Manager Errors:** The Data Error Summary Sheet may also be attached to an Excel spreadsheet identifying errors we noticed in Family Manager during the Quarterly Report data preparation process. These cases require clean up in Family Manager and will be accompanied by instructions for doing so (also see section “Correcting Family Manager Errors” below). The following is an example of an Excel spreadsheet detailing errors in Family Manager:

	A	B	C	D	E	F	G
1	Child ID	FM Gender	Client Type	FM DOB Type	FM DOB	FM Screendate	Screendate Birthdate Difference
2	9147698	0					
3	9162027		0		7/20/2206		
4	9260065				4/27/2007	10/14/1006	More than 10 Months
5	9279007	0		0			
6	9295607				12/7/2006	12/8/3006	More than 1 Year
7	9295617				12/15/2006	12/6/3006	More than 1 Year
8	9990742			0			
9	9991295				3/26/1976	3/26/2007	More than 1 Year
10	9572479				11/8/2008	10/19/2007	More than 10 Months
11	9599571				11/8/2007	1/9/2007	More than 10 Months
12	9622029				11/29/1988	11/30/2007	More than 1 Year
13							
14							

### **Correcting Family Manager Errors**

#### **FM Gender**

If a 0 is present, Gender needs to be changed to a valid value. Go into Family Manager and change the 0 to a:

- 1 for “female”
- 2 for “male” or
- 3 for “unknown”

#### **Client Type**

If a 0 is present, Client Type needs to be changed to a valid value. Go into Family Manager and change the 0 to a:

- 1 for first birth, 2 for twin of first birth, etc.

#### **DOB Type**

If a 0 or a 3 is present, the Date of Birth Type needs to be changed to a valid value. Go into Family Manager and change the 0 or 3 to a:

- 1 for “estimated birth date” or
- 2 for “actual birth date”

#### **FM DOB**

An error in this field could mean one of two things:

1. The Screendate-Birthdate difference is too large for the typical Healthy Start process. If this is the case, you'll see a comment in the Screendate-Birthdate cell. For example, the DOB was entered as 3/2/2005 and the Screen date was entered as 3/2/2007, making the time between birth and screening "More than 1 Year".
2. The date falls outside the set parameters for the child's date of birth. The child's date of birth should be updated to reflect the child's actual or estimated birth date. Often, the mother's DOB accidentally gets entered into this field. Another common mistake is to enter 3006 instead of 2006. Please go into Family Manager and change the child's DOB if needed.

### ***FM Screen Date***

An error in this field could mean one of two things:

1. The Screendate-Birthdate difference is too large for the typical Healthy Start process. If this is the case, you'll see a comment in the Screendate-Birthdate cell. For example, the DOB was entered as 3/2/2005 and the Screen date was entered as 3/2/2007, making the time between birth and screening "More than 1 Year".
- 1) The date falls outside the set parameters for the family's screen date. The screen date should be updated to reflect the actual screen date. Often, the mother's DOB accidentally gets entered into this field. Another common mistake is to enter a 3006 instead of 2006. Please go into Family Manager and change the family's screen date if needed.

### ***Screendate-Birthdate Difference***

If this cell is present and you see a comment in this cell "*More than 10 months*", it means that the screen date is more than 10 months before the child's birth date. This requires a modification of the DOB or screen date to create a realistic time frame between the screen date and the child's birth date.

If you see a comment in this cell "*More than 1 Year*", it means that the screen date is more than a year after the child's birth date. Go into Family Manager and change whichever date is incorrect or let NPC know that the dates are correct as they were entered into Family Manager.