

## DATA

### Sources of Data

██████████ is updated every month. At the current time, we request new/updated data from the five main providers (i.e., ██████████ & ██████████) every month by email on the 10<sup>th</sup> of the month. The providers must reconcile their records with ██████████ by the 10<sup>th</sup> of the month, so we in turn by requesting it then receive data that was “current” as of the last day of the previous month. For example, we request data on September 10 from the providers. That data was “current” as of August 31. As per our schedule, we must get this data into our system by the end of the month we request it for. So, again, the data requested on September 10 must be in our system by September 30. At any given time, our data is at least one month old and could be up to two or more months old.

Here is where the data comes from:

Provider	Contact	Email	Phone	Data
██████████	██████████	██████████	██████████	CM, placement history, school history, etc.
██████████	██████████	██████████	██████████	EEIFs
██████████	██████████	██████████	██████████	CM, Placement history, school history, etc.
██████████	██████████	██████████	██████████	Names, DOB, Provider, Intake date
██████████	██████████	██████████	██████████	CM, placement history, school history, etc.
██████████	██████████	██████████	██████████	CM, placement history, school history, etc.
██████████	██████████	██████████	██████████	CM, placement history, school history, etc.

## Passwords on Data

For security/privacy issues, providers are asked to password protect their Excel files when sending them to us. This is a list of the passwords the providers use as of the writing of this manual (10/30/2007):

Provider	Password
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]

## Monthly Schedule

On August 14, 2007, [REDACTED] staff met to determine a monthly schedule for the data person to follow. This was the result of that meeting:

Approximate Day of the Month	Task
First	Request releases from providers by sending password protected Excel files to each provider with names, DOBs, CMs, and teams (if [REDACTED] to contact people.
Tenth	Request data from provider data people. Also, request a current staff list with office (or teams, if [REDACTED] from each one.
Eleventh through Fifteenth	Verify data as it comes in from provider -- make sure that it is what we require, complete -- contact provider data people if there is a discrepancy.
Fifteenth	Send reminder emails to any provider data person who has not sent updated data. Request a clone of the [REDACTED] database to make updates / imports in.

Fifteenth through Second to Last Day	Update data in the clone
Last Day of Month	In the evening when everyone is out of the database, import in data from the clone into the live version and verify changes were made

EXAMPLE ONLY

## Determining Updated Data

Data in the Portfolio is only good for the moment it was pulled from the database of the provider. A youth's placement, school, or case manager can change quickly and without notice to us. THIS is why you must understand the portfolio is just a tool -- in many cases, the information is accurate; in other cases, the information could be months old.

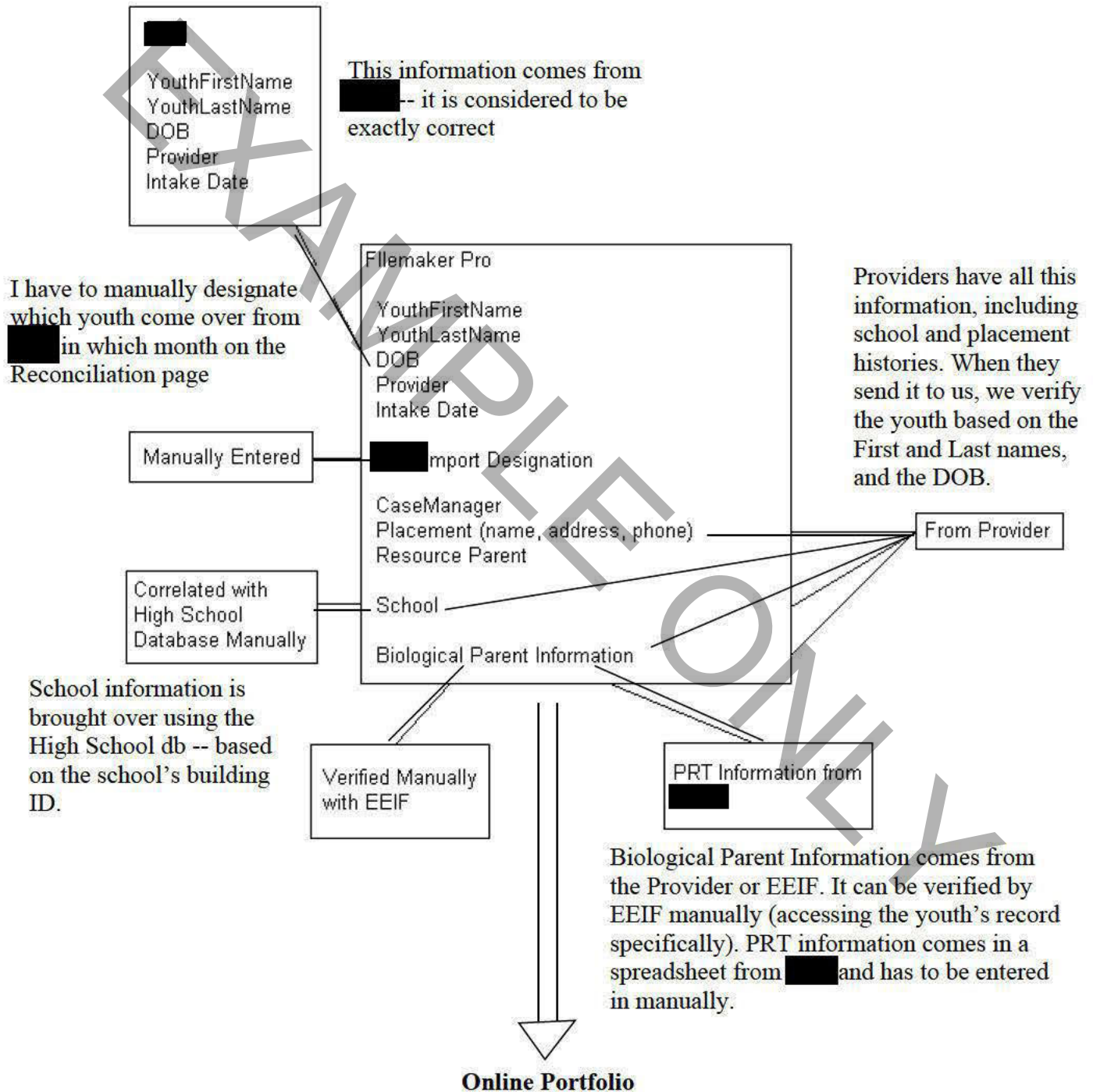
On top of this, data is only imported on youth who are currently in the system. For instance, if a youth is released from custody (i.e., turns 18, reintegrates, or adopts), then it is possible the information that was last given to us is the last information we will get. That is, when we request information from a provider, they will give us information on the youth currently 15 and over in out of home placement.

Our database currently has over [REDACTED] names of youth in it. On average, the list of youth currently in [REDACTED] custody is around [REDACTED]. Information on those [REDACTED] youth that didn't come from [REDACTED] is stagnate, and will not be updated unless someone manually puts information in the database based on conversations, transcripts, or other methods of data mining. This is important to remember.

## Mapping it to FileMaker

The primary system that we use to track data is FileMaker Pro. This is a general view of the way that data flows:

### Overview



The most logical way to explain the movement of data would be to address each FMP layout separately, describing the origin of each field. Before that, the following is a basic overview of the type of data, the origin, and the receive schedule:

Data	Origin	Schedule
Name	█	Monthly
DOB	█	Monthly
Provider	█	Monthly
School Information	Provider	Monthly
Placement Information	Provider	Monthly
CM Information	Provider	Monthly
Demographics	Provider	Monthly
Parent Information	Provider	Monthly
Parent Information	█	As accessed
Parent Information (PRT)	█	As requested

### Breakdown By Layout

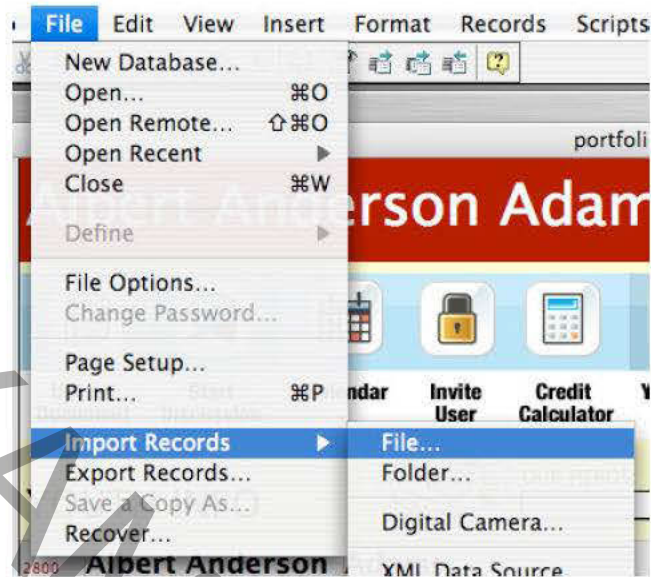
On the CHILD INFO page, █ sends the youth's FIRST NAME, LAST NAME, and DOB. Every month, █ sends an Excel file with a list of names. When we receive this file, I have to manually go through and remove the duplicate names. That is, the file from █ looks similar to this:

Firstname	Lastname	DOB	Provider	Intake Date	Region
Anderson	Cooper	06/03/1967	█	03/05/2005	█
Anderson	Cooper	06/03/1967	█	03/07/2005	█
Albert	Adams	05/13/1989	█	12/02/2006	█
Pamela	Anderson	01/04/1990	█	03/06/2006	█

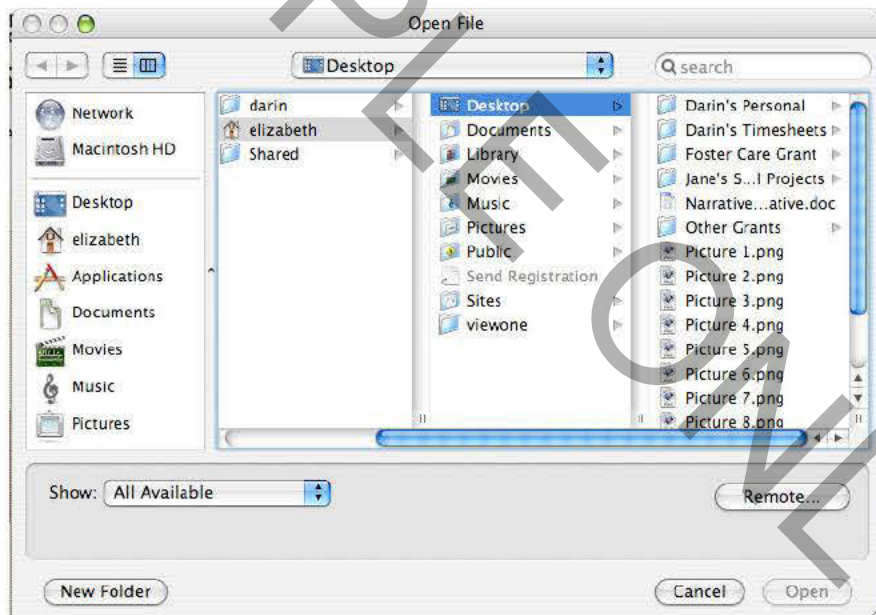
There are duplicate names when the youth is placed, leaves, and is re-placed in the foster care system. The file from █ is organized in a way that the bottom-most listing of the same youth is the most recent (see above). If I leave the duplicated listings and import the file into FMP, I will create duplicates in FMP.

When █ sends the data, the options in FMP that are chosen are to match up existing data PLUS add new records when no data match is found (see Figure 1). The youth's first name, last name, and DOB are used for matching. If the fields match, only the PROVIDER, INTAKE DATE, and the field that designates an import from █ are brought over. When this information is brought over, it

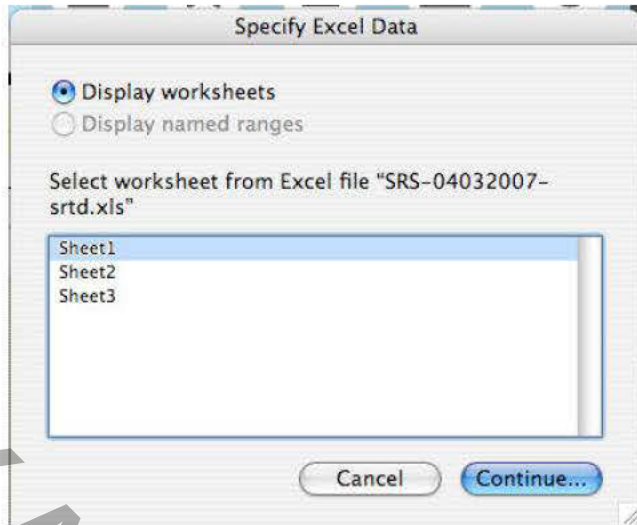
15. Click on FILE -> IMPORT RECORDS -> FILE...



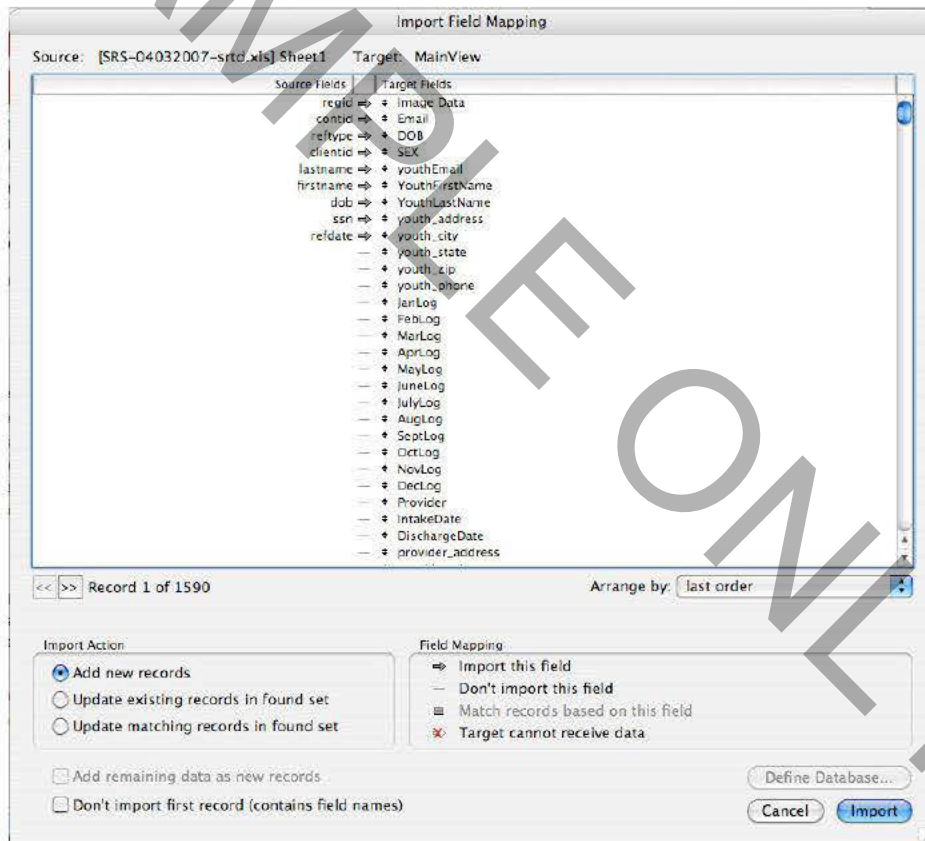
16. The next box that appears will ask what file you want to import:



17. Find the correct file from the location that you saved it in step 10 (the " [REDACTED] srttd.xls" file) and click OPEN.
18. A box will appear asking you what worksheet you want to import the records from -- since this is a file you just created, you want to select SHEET 1 and click CONTINUE:



19. The IMPORT FIELD MATCHING box will appear:



20. **\*\*As described in other documents, you must match up the fields from the file you just created (i.e., [REDACTED]-xxxxxxx-srtd.xls) with the fields in FMP that they are supposed to go into. BE SURE, if you don't know, consult the material on FIELD PLACEMENTS (another document/section) or ask someone.**
21. Match up the fields correctly.



- A. To match up fields, CLICK and HOLD on the double arrow to the direct left of the TARGET FIELDS section and move the listing up.
- B. You may have to scroll down on the right side in order to find the correct TARGET FIELD to place the source field into.
- C. The following fields should be matched up:

Source Fields		Target Fields
contid	->	Provider
lastname	=	YouthLastName
firstname	=	YouthFirstName
dob	=	DOB
refdate	->	IntakeDate

- 22. You must choose to the correct IMPORT ACTIONS from the bottom of the IMPORT FIELD MAPPING screen.
  - A. Under IMPORT ACTION, the bullet should be in UPDATE MATCHING RECORDS IN FOUND SET
  - B. The box for ADD REMAINING DATA AS NEW RECORDS must be checked
  - C. The box for DON'T IMPORT FIRST RECORD (contains field names) must be checked as well.
- 23. Choose the correct field mapping options:

**Incorrect**

**Correct**

- 24. \*\*Make sure that for the fields lastname, firstname, and dob, there is a = symbol to the right of them, and that there is a → symbol next to the other two fields that are matched up (look above again to verify).
- 25. Your IMPORT FIELD MAPPING screen should similar to this: