# Dane County
# Department of Human Services

## Lynn Green, Director

610 Form User Manual

Last Revised November 9th, 2007

# Table of Contents

# I. Overview

Each month a provider must submit a 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 a standardized form for reporting.

This manual was designed to help users complete the required 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 form 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 form, please feel free to contact your DCDHS representative for assitance.

# II. Before Using the 610 Form Template

## Supported software

The template has many built-in features that use advanced coding. Currently, only computers running Microsoft Excel version 2000 or above are supported. Earlier versions do not have the processes needed for this form. 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 computers are NOT supported 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, 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.htm.
3. Scroll down to the Reports section.
4. Click on the icon for the appropriate template.
5. Save a copy to your local drive.

Receiving through e-mail

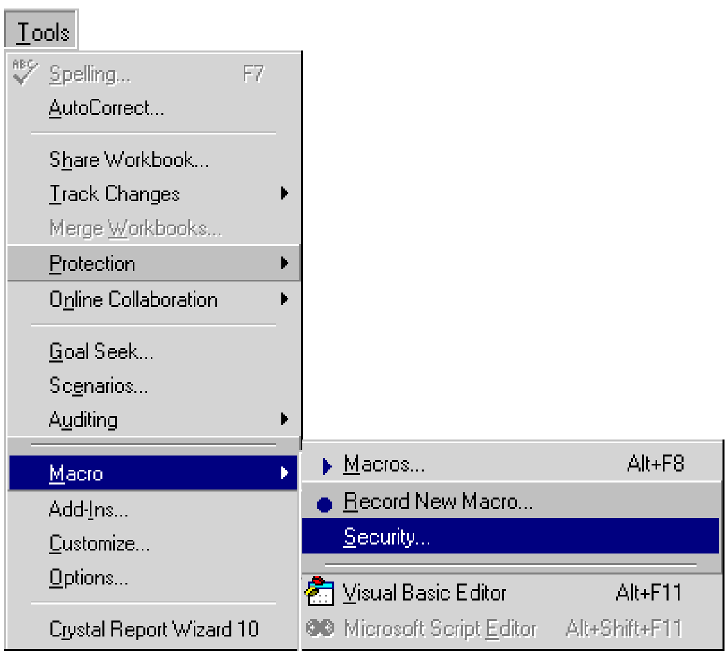
1. Send an e-mail to your DCDHS representative requesting a 610 Form template
2. They will send you a copy via e-mail shortly thereafter.
3. Open the e-mail.
4. Save the attachment to your local drive.

It is recommended that each year providers download, or request via e-mail, a new 610 Form template since a template has the capability of maintaining no more than a twelve-month history. 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 610 Form template is a password-protected form. 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.

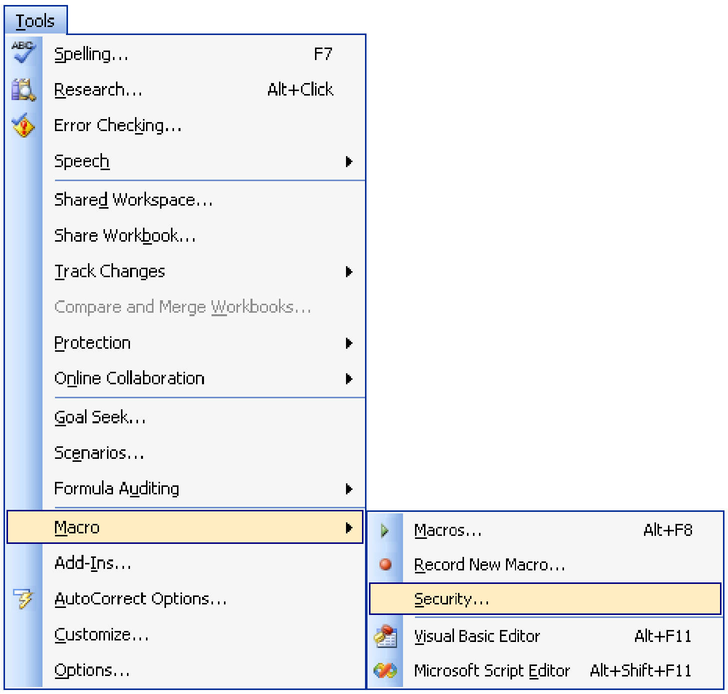
P2-2: Pop-up menu in MS Excel 2000.

1. Open Microsoft Excel.
2. On the menu bar, select *Tools*.
3. Scroll down until *Macro* is highlighted and an additional window is displayed.
4. Move over and select *Security…*
5. Select the *Security Level* tab on the top of the pop up window.
6. The security level indicator should be set at “**Medium**”. If the level is indicated as “**High**”, deselect and select “**Medium**”[2].
7. Click the *OK* button.
8. Exit out of the Microsoft Excel Application.
9. Restart Microsoft Excel and open the template.
10. 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*[1].
11. Click the *Enable Macros* button[1].

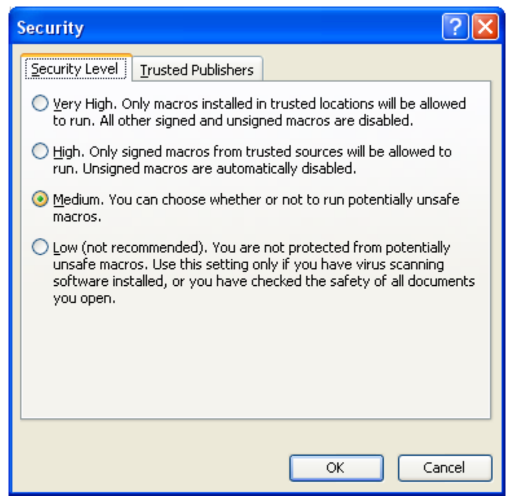
[1] If the security level is set to “Low”, there will be no message prompt during startup. It is recommended the level be set to “Medium”.

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

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.




P2-3: Menu Navigation in MS Excel 2003




P2-3: Security menu in MS Excel 2003

# III. Entering Data on the Template

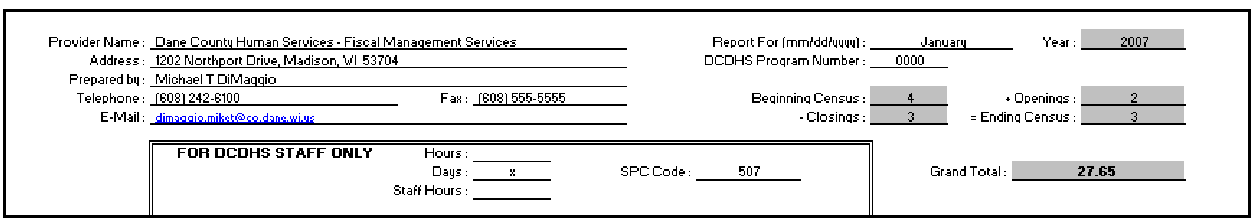
## Selecting the correct worksheet in the template

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.** There are procedures installed to transfer previous months back to this worksheet in order to make revisions.

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”. The worksheets “Jan” through “Dec” are history worksheets only and are, therefore, read only. No changes to the worksheets’ formatting or structure will be accepted.

The “Recorded Errors” worksheet is where all errors from the "610 Form" worksheet are recorded. This worksheet is also read only and its 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 Form to Dane County” or “Error descriptions and corrections” section found in the appendix.

## Entering the header information


Provider Name : Dane County Human Services - Fiscal Management Services
Address : 1202 Northport Drive, Madison, WI 53704
Prepared by : Michael T DiMaggio
Telephone : (608) 242-6100
Fax : (608) 555-5555
E-Mail : dimaggio.miket@co.dane.wi.us
Report For (mm/dd/yyyy) : January
Year : 2007
DCDHS Program Number : 0000
Beginning Census : 4
+ Openings : 2
- Closings : 3
= Ending Census : 3
FOR DCDHS STAFF ONLY
Hours :
Days : x
Staff Hours :
SPC Code : 507
Grand Total : 27.65

P3-1: A picture of a completed Header section of the “610 Form” worksheet.

The header section of the form contains data unique to the provider; e.g. month(s) of service, the name of the person preparing the form, 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.

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 form here.
4. **Telephone**, **fax**, and **e-mail**: This is the information of the person preparing the form in case they need to be contacted. Please include an extension if applicable.
5. **Report For (mm/dd/yyyy)**[1]: 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**, **Unit Type**, and **SPC Code**[2]: Providers who are currently reporting their services to the Department will already know their program number(s), unit type(s) and SPC code(s). For new providers, who are reporting for the first time, a DCDHS staff member will inform them of their program number, unit type and SPC code. Once the provider has received this information, the person completing the form should enter the data in the appropriate fields. All providers should only enter the program number, unit type and SPC code on the first month's worksheet. This data will automatically appear on the following months' worksheets.

[1] Before changing the Report For field, please see the section "Removing previously closed clients"
[2] Periodically, due to contract changes, the DCDHS Program Number, Unit Type, and SPC code may change.

The grey areas are formulated fields that cannot be altered in any way. The beginning census, based on client numbers, will be automatically computed on the worksheet. This number should always match the previous months' ending census field. Opening and closing census information is based upon the start date and close date entered for each client. The ending census is calculated by taking the beginning census, adding the opening census, and subtracting the closing census. The grand total is a sum of the total amount of units recorded on the form.

## 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 | Closing Statuses A | F | E | LA | AR |
| 1 | x | | Armstrong, Xavier | 123456 | 6.50 | 01/04/2007 | 04 | 04 | 43 | | 980.9 | | | | | | | |
| 2 | | x | Conner, Sarah B | 789012 | 12.00 | 11/05/1998 | | | | | | 01/31/2007 | 14 | 3 | 4 | 6 | 07 | 03 |
| 3 | | x | DiMaggio, Michael T | 345678 | 7.75 | 06/06/2006 | 05 | 05 | 43 | 80 | 980 | 01/28/2007 | 06 | 9 | 9 | 0 | 99 | 97 |
| 4 | | | Jesberger, Erin K | 901234 | 0.05 | 08/04/2006 | 74 | 16 | 61 | | 980.8 | | | | | | | |
| 5 | | | Marshall, James R | 567890 | 0.25 | 09/04/2004 | | | | | | | | | | | | |
| 6 | x | x | Munis, Zachary M | 098765 | 1.10 | 01/17/2007 | 17 | 04 | | | 980.01 | 01/24/2007 | 01 | 1 | 2 | 2 | 02 | 00 |
| | 2 | 3 | | 6 | 27.65 | | | | | | | | | | | | | |

P3-2: Above is a picture of a completed AODA data portion of a January 2007 610 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 are three clients closed in picture P3-2.)
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 to the following 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 | | Armstrong, Xavier | 123456 | 6.50 | 01/04/2007 |
| | x | Conner, Sarah B | 789012 | 12.00 | 11/05/1998 |
| | x | DiMaggio, Michael T | 345678 | 7.75 | 06/06/2006 |
| | | Jesberger, Erin K | 901234 | 0.05 | 08/04/2006 |
| | | Marshall, James R | 567890 | 0.25 | 09/04/2004 |
| x | x | Munis, Zachary M | 098765 | 1.10 | 01/17/2007 |

P3-5: A picture of the Consumer Information section from picture P3-2.

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

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 form.
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 form.
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 should be left blank.
4. **Start date**: Enter the start date in mm/dd/yyyy format (e.g. 01/01/2007). The start date must stay until the service is closed out.
5. **New** and **close** grey columns: Cells containing formulas to flag if a client is new or closing. These cells are locked and should never be changed.

### Opening a new client (Opening Information section)

| OPENING INFORMATION | | | | |
|---|---|---|---|---|
| Target Group | Client Characteristics 1st | 2nd | 3rd | Diagnosis |
| 04 | 04 | 43 | | 980.9 |
| | | | | |
| 05 | 05 | 43 | 80 | 980 |
| 74 | 16 | 61 | | 980.8 |
| | | | | |
| 17 | 04 | | | 980.01 |

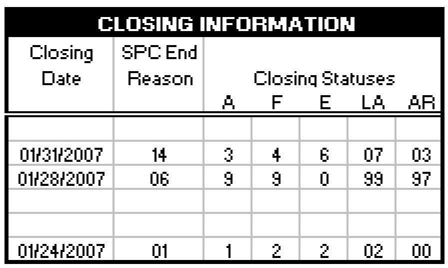
P3-3: A picture of the Opening Information section from picture P3-2.

1. Click anywhere within the data portion of the “610 Form” worksheet.
2. Click the *Insert Row* (

) button.
3. Enter a valid **Target Group** according to the appropriate HSRS desk card.
4. Enter valid **Client Characteristics** according to the appropriate HSRS desk card. (There are fields available for one to three client characteristics. However, only the primary characteristic IS required.)
5. Enter a valid **Diagnosis code**. Acceptable diagnosis codes are listed in the ICD-9-CM (found at http://icd9coding1.com) or the DSM-IV.

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 | E | LA | AR |
| | | | | | | |
| 01/31/2007 | 14 | 3 | 4 | 6 | 07 | 03 |
| 01/28/2007 | 06 | 9 | 9 | 0 | 99 | 97 |
| | | | | | | |
| | | | | | | |
| 01/24/2007 | 01 | 1 | 2 | 2 | 02 | 00 |

P3-4: A picture of the Closing Information section from picture P3-2.

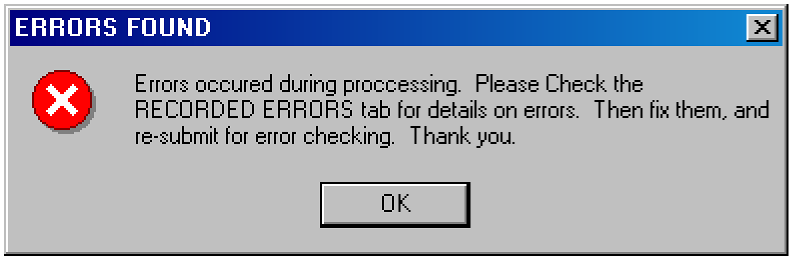
1. Enter in the **Close Date** in mm/dd/yyyy format.
2. Enter in the **SPC End Reason** according to the HSRS desk card.
3. For AODA clients, enter in the **Closing Statuses**[1]. Below is a chart of closing statuses, the descriptions, and values to use for refusal to disclose by client.

[1] Certain SPC codes listed on the AODA deskcard do not require closing statuses.

| Closing Status[1] | 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 |
| **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 |

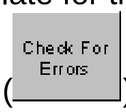
Once closed out, the client needs to be removed from the template the following month. (Please see the “Previously closed clients” section within this manual for information on how to do this.)

### Checking and fixing errors




P3-6: Error message displayed when an error has been found within the data entry portion of the form.

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.

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[1].
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[2].
6. Go to step 2 and repeat until all errors have been fixed.

[1] The monitor screen may temporarily flicker during this process as it checks all the information on the form. It will eventually return to normal.
[2] The "Recorded Errors" worksheet will display the **error** name, the **column** and **DATA row** the error occurred in, and a brief **description** of the error.

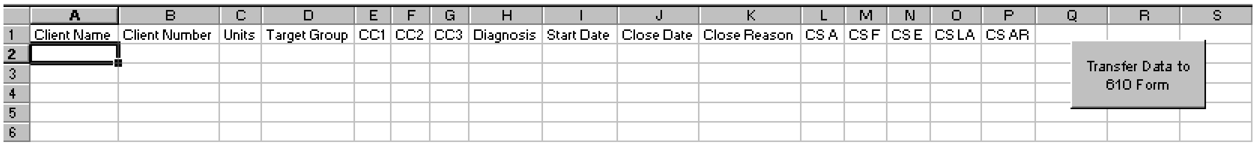
| | A | B | C | D |
|---|---|---|---|---|
| 1 | Error | Column | Data Row | Notes |
| 2 | Missing CLIENT NUMBER | E | 1 | Must enter a CLIENT NUMBER for each client or clear out row. |
| 3 | Missing TARGET GROUP | G | 1 | TARGET GROUP must be entered to be valid. |
| 4 | Missing PRIMARY CLIENT CHARACTERISTIC | H | 1 | Must enter a PRIMARY CHARACTERISTIC for the client to be valid. |
| 5 | Missing DIAGNOSIS | K | 1 | Must enter a DIAGNOSIS in order to open client. |
| 6 | Missing CLOSING REASON | M | 1 | Must enter a CLOSE REASON in order to close client. |
| 7 | Missing FREQUENCY OF USE PRIOR TO DISCHARGE | O | 1 | Must enter FREQUENCY OF USE PRIOR TO DISCHARGE to close client. |
| 8 | Missing FAMILY RELATIONSHIP AT DISCHARGE | P | 1 | Must enter FAMILY RELATIONSHIP AT DISCHARGE to close client. |
| 9 | Missing EMPLOYMENT STATUS AT DISCHARGE | Q | 1 | Must enter EMPLOYMENT STATUS AT DISCHARGE to close client. |
| 10 | Missing LIVING ARRANGEMENT AT DISCHARGE | R | 1 | Must enter LIVING ARRANGEMENT AT DISCHARGE to close client. |
| 11 | Missing NUMBER OF ARRESTS 30 DAYS PRIOR TO DISCHARGE | S | 1 | Must enter NUMBER OF ARRESTS 30 DAYS PRIOR TO DISCHARGE to close the client. |

P3-7: A picture of a generated "Recorded Errors" worksheet.

When the template is error free, the calculations of the **census**, the **grand total** of units, and the placement of the sixteen-row summary will be registered on the "610 Form" worksheet. A copy of the "610 Form" worksheet will also be transferred to the appropriate history worksheet. (E.g. If you are reporting for January, a copy of the form will be placed on the "Jan" worksheet).

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

## Importing data from a separate database



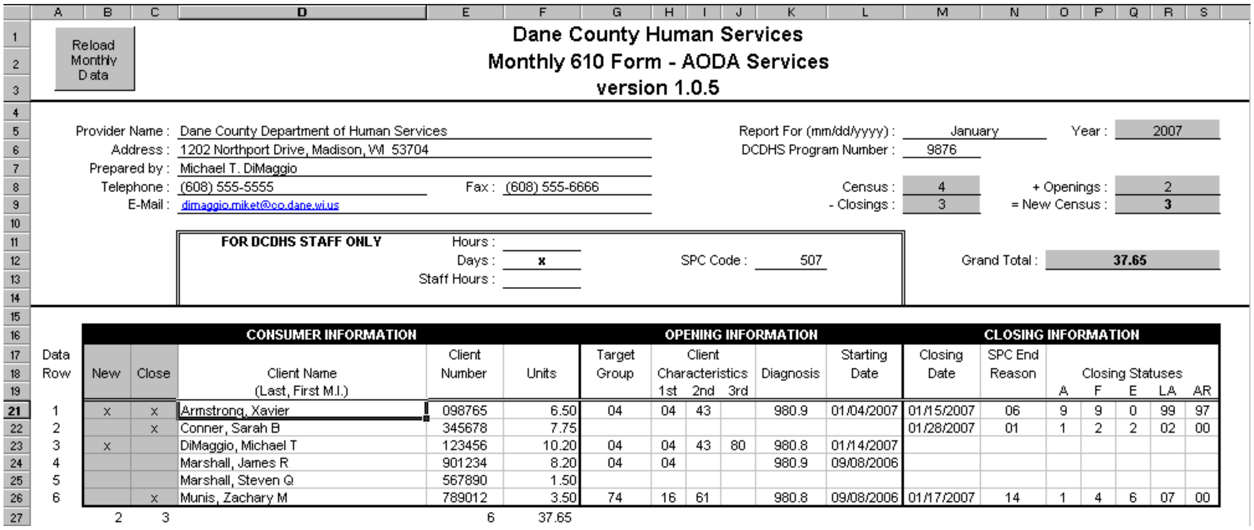

P3-8: A screen shot of the "Database Import" worksheet for AODA services. The grid should be placed on this sheet and the *Transfer Data to 610 Form* button clicked.

There is a built-in process to easily bring in 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[1] with the following columns in order:
    a. Client Name
    b. Client Number
    c. Units
    d. Target Group
    e. Client Characteristic 1
    f. Client Characteristic 2
    g. Client Characteristic 3
    h. Diagnosis
    i. Starting Date
    j. Closing Date
    k. SPC End Reason
    l. Closing Status A
    m. Closing Status F
    n. Closing Status E
    o. Closing Status LA
    p. Closing Status AR
2. Copy the grid.
3. Paste the grid without column headers on the "Database Import" worksheet in the template.
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.

[1] All grids must have columns A – K. AODA clients must also have columns L – P.

# Making revisions to previously submitted months



Reload Monthly Data

**Dane County Human Services**
**Monthly 610 Form - AODA Services**
**version 1.0.5**

Provider Name : Dane County Department of Human Services
Address : 1202 Northport Drive, Madison, WI 53704
Prepared by : Michael T. DiMaggio
Telephone : (608) 555-5555 Fax : (608) 555-6666
E-Mail : dimaggio.miket@co.dane.wi.us

Report For (mm/dd/yyyy) : January Year : 2007
DCDHS Program Number : 9876
Census : 4 + Openings : 2
- Closings : 3 = New Census : 3

**FOR DCDHS STAFF ONLY** Hours :
Days : x SPC Code : 507
Staff Hours :

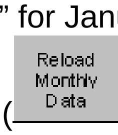
Grand Total : **37.65**

| | CONSUMER INFORMATION | | | | | OPENING INFORMATION | | | | | | CLOSING INFORMATION | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Data Row | New | Close | Client Name (Last, First M.I.) | Client Number | Units | Target Group | Client Characteristics 1st | 2nd | 3rd | Diagnosis | Starting Date | Closing Date | SPC End Reason | Closing Statuses A | F | E | LA | AR |
| 1 | x | x | Armstrong, Xavier | 098765 | 6.50 | 04 | 04 | 43 | | 980.9 | 01/04/2007 | 01/15/2007 | 06 | 9 | 9 | 0 | 99 | 97 |
| 2 | | x | Conner, Sarah B | 345678 | 7.75 | | | | | | | 01/28/2007 | 01 | 1 | 2 | 2 | 02 | 00 |
| 3 | x | | DiMaggio, Michael T | 123456 | 10.20 | 04 | 04 | 43 | 80 | 980.8 | 01/14/2007 | | | | | | | |
| 4 | | | Marshall, James R | 901234 | 8.20 | 04 | 04 | | | 980.9 | 09/08/2006 | | | | | | | |
| 5 | | | Marshall, Steven Q | 567890 | 1.50 | | | | | | | | | | | | | |
| 6 | | x | Munis, Zachary M | 789012 | 3.50 | 74 | 16 | 61 | | 980.8 | 09/08/2006 | 01/17/2007 | 14 | 1 | 4 | 6 | 07 | 00 |
| | 2 | 3 | | 6 | 37.65 | | | | | | | | | | | | | |

P3-9: A screen shot of the “Jan” history worksheet with data entered.

All changes should be made to the worksheet entitled “610 Form” as this is the worksheet that our system searches for in order to transmit into reporting tools. Occasionally, a mistake will be made after the template has been submitted. To fix these errors, follow the steps below.

**NOTE:** Do not attempt making revisions to previous months until you have completed the current month, including error corrections, or made a separate copy of the workbook.

1. Select the worksheet with the three-letter abbreviation for the month that needs to be re-submitted (“Jan” for January, “Feb” for February, etc.).
2. Click the *Reload Monthly Data* (

) button in the upper left hand corner[1].
3. On the “610 Form” worksheet, enter in the corrections.
4. To highlight the row where the change occurs, move the cursor to a cell within the changed row and click the *Highlight Row* (

) button[2].
5. Follow the steps in the section “Checking and Fixing Errors”.
6. Once all errors have been corrected, click the *Remove All Highlights* (

) button.

[1] Once the *Reload Monthly Data* button has been pressed, all existing information on the “610 Form” worksheet will be overwritten. This is why it is wise to finish the work on the current month BEFORE making revisions to previous months

[2] If the *Highlight Row* button is has been clicked on a row that doesn’t have any changes, click the *Highlight Row* button again to remove the highlight.

## 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 form 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 Form 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 you local drive[1].
5. Type in the e-mail address of your DCDHS Staff member.
6. Send the e-mail.

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

## Submittal checklist and late forms

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. Appendix

## 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 program number, unit type, and SPC code.
3. Enter in provider information
4. Enter in preparer information
5. Enter in data following either the month-to-month manual reporting or the importing from an outside database section

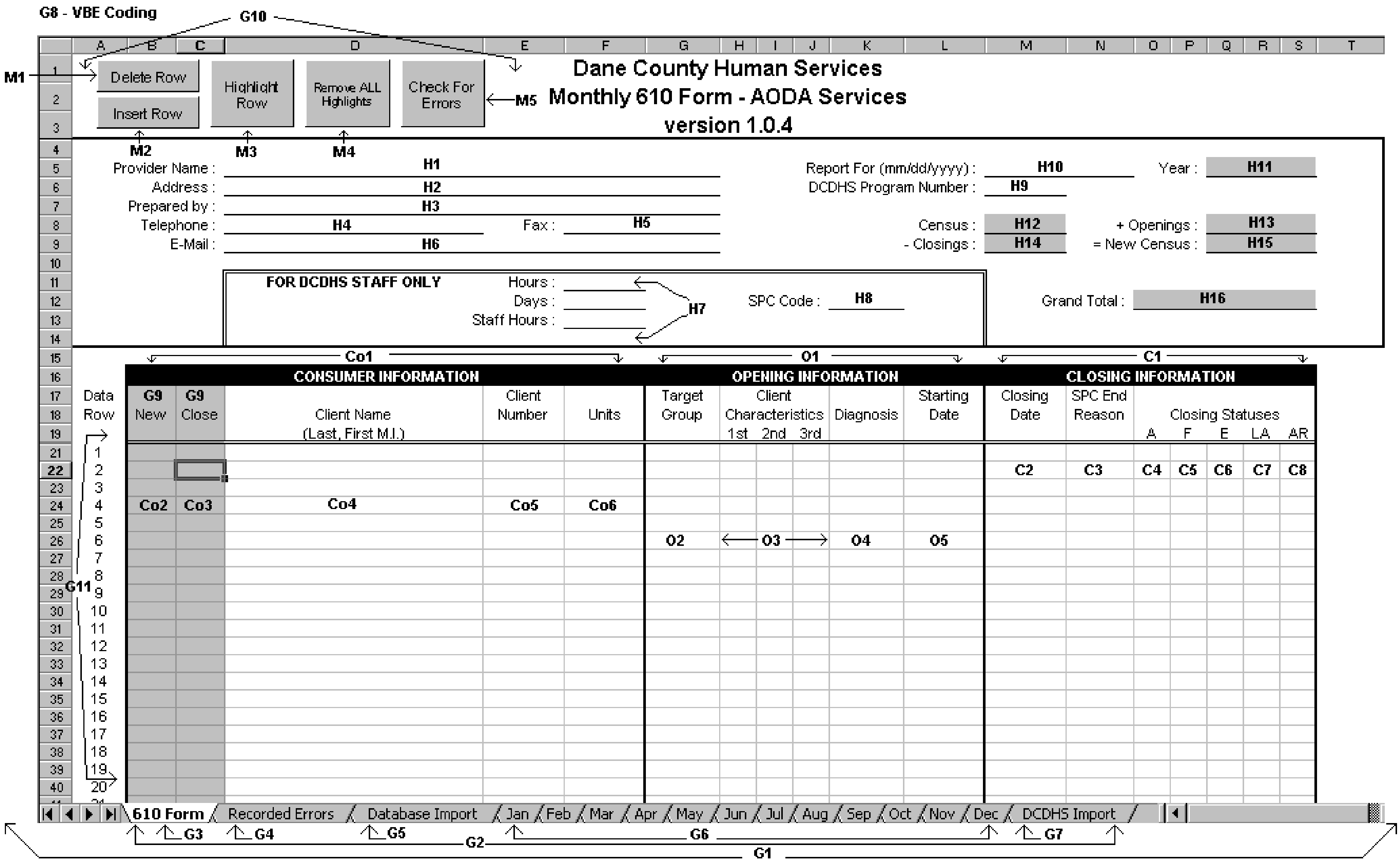
### Month-to-month manual reporting

1. Delete the previously closed clients from the previous month.
2. Change the Report For cell to the next 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.
2. Copy the data from the query excluding headers.
3. Paste the information on the "Database 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.

## 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 Database Import – Worksheet used to import data into the “610 Form” worksheet from an outside database.

G6 Jan through Dec tabs – Worksheets used to store data from previous months. The tab name indicates the month of data entry.

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

G8 VBE Coding (Hidden)– The computer language behind the error checking process and other features. The user will not be able to see this.

G9 Grey Areas on 610 Form – Cells that contain formulas that cannot be altered.

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 Header Section**

H1 Provider Name (Required) –Name of the provider reporting the services is entered here.

H2 Address (Required) – Provider address is entered here.

H3 Prepared by (Required) – The name of the employee responsible for completing the form.

H4 Telephone (Required) – This is the telephone number of the employee who prepared the form. Needs to be in (###) ###-#### format.

H5 Fax (Optional) – This is the fax number of the employee who prepared the form. Needs to be in (###) ###-#### format.

H6 E-Mail (Optional) – This is the email address of the provider employee who prepared the form.

H7 UNIT TYPE (Assigned by DCDHS) – This is the type of service unit being reported on the form; i.e. hour, day, staff hour.

H8 SPC Code (Assigned by DCDHS) – The Standard Program Category code that describes the type of service being provided.

H9 DCDHS Program 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.

H10 Report For (Required) – The month and year for which services are being reported. Must be in mm/dd/yyyy format.

H11 Year (Calculated) – A formula cell that computes the year from the report date entered.

H12 Census (Calculated) – 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.

H13 Openings (Calculated) – A formula cell that totals all clients being opened for the given month.

H14 Closings (Calculated) – A formula cell that totals all clients being closed for the given month.

H15 New Census (Calculated) – A formula cell that uses the existing 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 census.

H16 Grand Total (Calculated) – A formula cell that displays the total number of units being reported.

**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.

**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.

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

O5 Start 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 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 only)**

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 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.

**Detail of Macro Buttons**

**"610 Form" worksheet macro buttons**

M1 Delete Row – This button removes a line of data.

M2 Insert Row[1] – This button inserts a new line of data with the formulas entered in the locked cells.

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 – This button begins the error checking process, stores the given month of data, and creates the automated worksheet.

(Not listed in picture)

**"Database Import" worksheet macro button**

D1 Transfer Data to 610 Form – This button transfers a user created grid from the "Database Import" worksheet to the "610 Form" worksheet

**"Jan" through "Dec" worksheets macro buttons**

Hi1 Reload Monthly Data – This button transfers previous data to the "610 Form" worksheet for revisions.

[1] 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.

## Valid data entries in data portion by column

| Column | Header | 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. It cannot be greater than the number of units in the given month. |
| G | Target Group | Any two-digit number according to the appropriate desk card. For a single number entry, a zero will be placed in front. |
| H – J | Client Characteristics | Any two-digit number according to the appropriate desk card. For a single number entry, a zero will be placed in front. Only one characteristic is required. |
| K | Diagnosis | Any value accepted by the ICD-9-CM (found at http://icd9coding1.com) or the DSM-IV. |
| L | Start Date | A date value in the format mm/dd/yyyy. (03/05/1979) |
| 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. For a single number entry, a zero will be placed in front. |
| AODA Clients Closing Statuses Only[1] | | |
| 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. |

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

## Error descriptions and corrections

| Error | Description | What to check |
|---|---|---|
| Missing *(field)* | The *(field)* must be entered to be valid | A required value is missing off the form. Enter the value |
| Invalid *(field)* | The *(field)* must be a valid *entry*… | The value entered does not match the accepted values on the associated desk card. Enter the correct value. |
| Incorrect *(field)* format | The (*field)* must be in (*format)* format to be valid | The data entered is in an incorrect format. Please change the value to the stated format in the error message. |
| Multiple *(field)* selected | Only one *(field)* can be selected in order to be valid. | Two or more entries were selected where only one can be selected. Delete any stored value in the other field. |
| Missing Clients From Previous Month | The census must match the previous month's census | Current month's starting census is less than previous month's ending census. Add the missing clients. |
| Greater Clients Than Previous Month | The census must match the previous month's census | Current month's starting census is greater than previous month's ending census. Remove the additional clients or resubmit previous months with corrected data. |

## Ten Frequently Asked Questions (FAQ) sheet

**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.