EXCEL DASHBOARD USER GUIDE

Colorado Problem Solving Courts

Version 2.1

Prepared for

State Court Administrator's Office
Colorado Judicial Department

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CONTENTS

INTRODUCTION

This user guide provides an overview for how to use the CO Problem Solving Court (PSC) Excel Dashboard and is intended to be used by PSC treatment court staff. The CO PSC Excel Dashboard was designed by NPC Research, in partnership with the Colorado Judicial Department, Administrative Office of the Courts. It is expected to be used as an interim resource while PSC teams wait for a statewide management information system to be created by the Colorado Judicial Department.

WHAT IS A DASHBOARD?

A dashboard is an interactive and accessible tool designed to store, organize, and visualize a variety of important program information. In the case of treatment courts, dashboard data visualizations allow a treatment court team to better identify trends in their treatment court program, understand relationships between participant characteristics and outcomes, as well as provide insight into how a court is meeting its goals. It is intended for program monitoring and not designed as a case management tool.

The dashboard updates in real time – changing and evolving as you add more information. This ultimately allows your team to better understand your treatment court and make thoughtful, data-driven decisions.

Note that when you first receive your Excel Dashboard, it will be blank. **Since your dashboard contains personally identifiable information, if you need technical help with your dashboard, do not email your dashboard.** Rather, email your question and someone will provide you follow-up instructions.

EXCEL DASHBOARD LIMITATIONS

The Excel Dashboard looks like a database, but it is very different. In many ways, the Excel Dashboard is more dynamic and customizable. However, because of this flexibility, there are fewer built-in protections, making it easier to do something that makes it stop functioning. Therefore, **do not change the names of variables or sheets** and **make sure all individuals have a unique identifier that is used consistently.** Please contact NPC Research immediately you encounter any of these issues.

Below are other limitations of the Excel Dashboard to keep in mind:

- Only one user can access the Excel Dashboard at a time. It can, however, be stored on a shared drive where users can access it from different locations.
- The Excel Dashboard may be best for smaller programs where one person will be entering data at a time.
- Excel is a convenient application. Most people have it, and most people are familiar with using it. However, it does not have all the same data entry features as a full-scale database.
- Be patient when refreshing and filtering the dashboard sheets – the Excel Dashboard is very large due to the number of graphics and can sometimes take up to a minute to refresh.
- The Excel Dashboard needs to be saved after every use or any changes may be lost.

KEY CONTACTS

Please reach out to any of the following individuals with questions or concerns about your Excel Dashboard. Please direct any technical issues towards NPC Research.

- Mike Burtis — Colorado Problem Solving Court Coordinator
    - *Email*: **michael.burtis@judicial.state.co.us**
    - *Work Phone*: (720) 625–5000
    - *Direct Phone*: (720) 625–5948
- Dr. Shannon Carey — Co-President and Senior Research Associate at NPC Research; Principal Investigator for the Colorado PSC Excel Dashboard project
    - *Email*: **carey@npcresearch.com**
    - *Phone*: (503) 243–2436 x104
- Lyndsey Smith – Researcher at NPC Research; Developer of the Colorado PSC Excel Dashboard
    - *Email*: **smith@npcresearch.com**
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HOW TO USE THIS GUIDE

This user guide is generally composed of four major topics:

1. A **Getting Started** section to give you a brief overview of the Excel Dashboard, including navigation.
2. Detailed **Data Entry Sheets** descriptions and instructions.
3. Detailed **Interactive Dashboard** sheet descriptions and instructions.
4. **Frequently Asked Questions** and other technical assistance.

Ideally this user guide will be actively used alongside your Excel Dashboard as you first start entering data. However, if you are incredibly **short on time** and need to digest the most information in the least amount of time, **review the Getting Started guide, including the Quick Start Guide on page 10.**

As you increase comfortability with Excel and the Excel Dashboard, the user guide can shift towards being a light refresher or reference for any possible questions that may come up. Eventually it may become a useful historical data dictionary to store alongside the Excel Dashboard for future research or analysis once you shift to the updated database created by the Colorado Judicial Department.

GETTING STARTED

SAVING YOUR EXCEL DASHBOARD

Save a copy in a secure location where only the necessary people (i.e., the people on your treatment court team) have access to the data. You may need to work with your local IT department to choose an appropriate location. Here are some things to consider when choosing a location to save your Excel Dashboard:

- If possible, consider saving to a location that you can **access from multiple locations**, regardless of whether you are in the office or working from home. Many courthouses have a shared drive that staff can access (usually after they login to the court system).
- Consider choosing a location that is **backed up regularly** or periodically make back-ups of your file. Accidents happen—saving to the desktop of your computer is not ideal. Check with your IT department to find out if files on the shared drive are regularly backed-up. If not, consider making back-ups of your Excel file, just in case the file (or computer!) you are working with suddenly crashes.
- Since this file will contain sensitive health (e.g., substance use) and other confidential information, you will want to **choose a folder that is secure, where only the necessary team members have access**.
- You may also choose to **password-protect** this Excel Dashboard to prevent unwanted users from accessing the file or password-protect specific data sheets to ensure data integrity. For instructions on how to password-protect this Dashboard, please visit: **https://support.microsoft.com/en-us/office/protect-an-excel-file-7359d4ae-7213-4ac2-b058-f75e9311b599**
- Unlike many databases, the Excel Dashboard needs to be **saved after every use** or any changes may be lost.

EXCEL DASHBOARD STRUCTURE

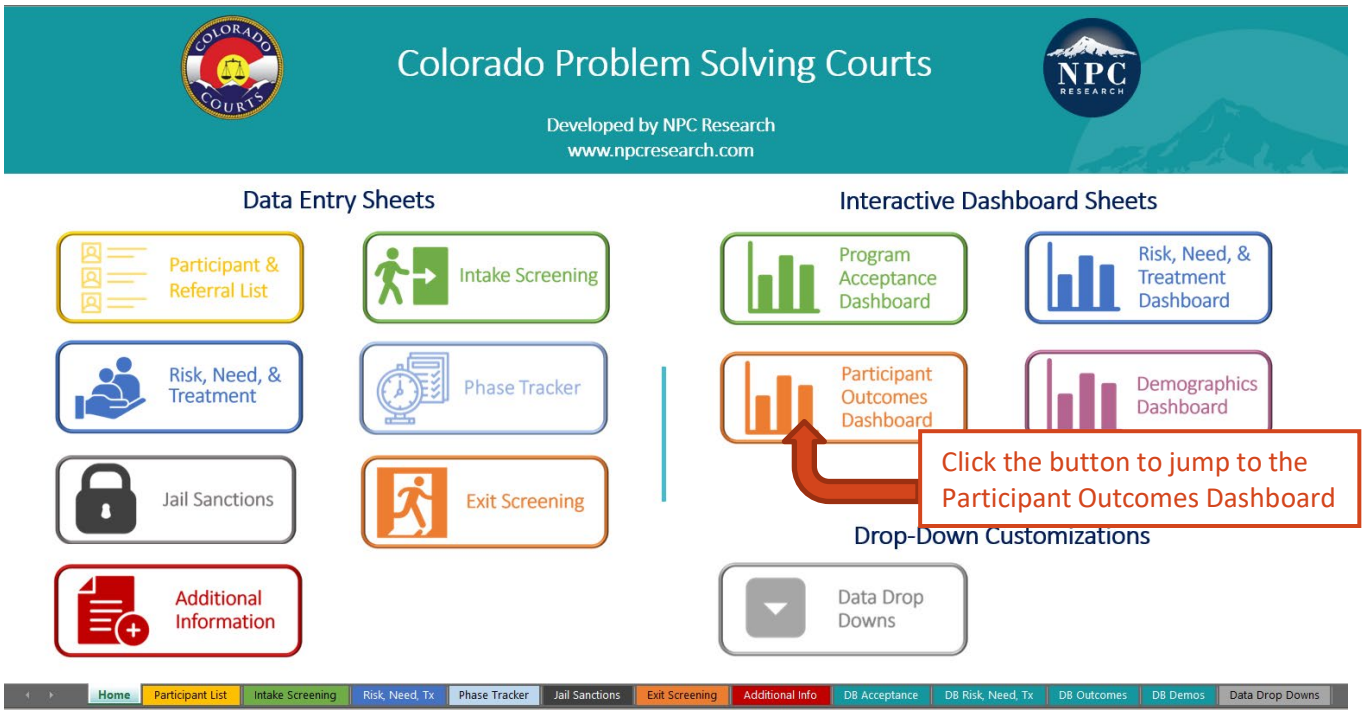
This Excel Dashboard contains multiple sheets, some of which are visible and others that are working behind the scenes. We have divided the sheets in the Excel Dashboard into 5 types:

- **Home Page** – this sheet has pre-defined buttons that help you jump to different sections of the workbook.
- **Data Entry Sheets** – these sheets are where you will enter information about your participants. Detailed information about each data entry sheet starts on **page 10**.
- **Interactive Dashboard Sheets** – this is where your participant data come to life! These are sheets that have graphs and tables pre-programmed into your workbook. Detailed information about each dashboard sheet starts on **page 30**.
- **Data Drop Down Sheet** – this is where you can change some of the response options to customize your Excel Dashboard to your program. Instructions on how to use them begins on **page 13** and instructions on how to update them begins on **page 45**.
- **Hidden Sheets** – you will not be able to see these sheets, but these contain formulas and calculations that drive the graphs on the dashboard sheets.

For more tips on working with Excel, see the section titled Excel Tips & Tricks (**page 47**).

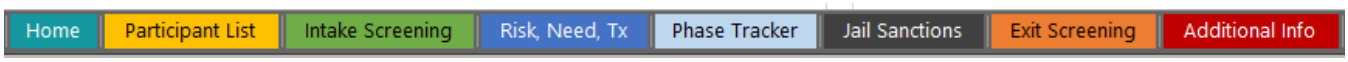
EXCEL DASHBOARD NAVIGATION

The first time you open the Excel Dashboard, you will see the Home Page. The **Home Page** is the main screen you will use for navigation. As you can see in the example on the next page, the left side includes a directory of the data entry sheets and the right side lists the interactive dashboard pages. Each button sends you to that corresponding sheet within the Excel Dashboard.



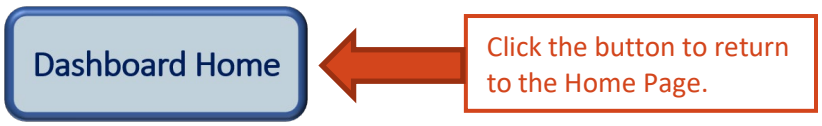
You can also navigate to these sheets by clicking the sheet tabs at the bottom of the Excel Dashboard. The sheet names have been abbreviated for space.

Dashboard Home Sheet and Data Entry Sheet Tabs



Dashboard Sheet Tabs and Data-Drop Downs Sheet Tabs

All sheets in your Excel Dashboard include a button in the top-left corner that will take you back to the Home Page. This will allow you to quickly navigate between different sheets of the Excel Dashboard.



QUICK START GUIDE

Participant information is entered on each of the individual data entry sheets.

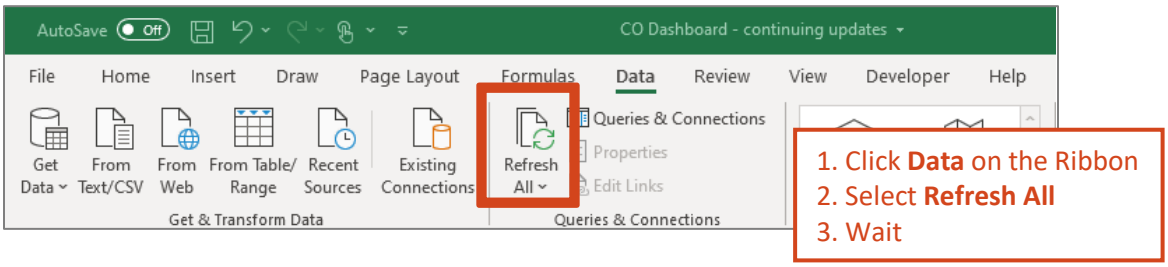
1. First, enter the individual's basic information on the ***Participant & Referral List*** data entry sheet with special attention paid to the variables that combine to create the unique participant identifier (Participant ID, Last Name, First Name, and Participant Note). This unique identifier for the participant that will be used in all the subsequent data entry sheets and appear in the first column, **Participant**.

   Note: the table will automatically expand on the Participant & Referral List sheet to capture the new individual. Enter the new participant name in the row immediately below the last participant (i.e., do not skip rows) and just hit Enter or Tab!

2. Continue filling out data on other sheets as you receive it. To add more information to other sheets, **begin by selecting the unique identifier from the Participant drop-down list** by clicking on the gray drop-down arrow to the right of the cell. See **page 13** on using data drop-downs. **Verify with the *Participant & Referral List* that this is in fact the correct unique identifier for the individual.**

   Note: the table will automatically expand to capture the new information once the unique identifier is selected from the drop-down list.

3. When you have entered all the new information, make sure you refresh the Excel Dashboard. Under the Data Ribbon, select **Refresh All.** This will update the dashboard sheets with up-to-date information. **Be patient as it may take up to a minute.**



Below is a link to a training video from the pilot launch of the dashboard. Some of the pages of the dashboard have been updated since its release and therefore some of the information is not relevant to Version 2.1. However, the video provides a great introduction into the functionality and overview of the structure of the dashboard. **https://www.youtube.com/watch?v=qTEELmpg7EM**

DATA ENTRY SHEETS

OVERVIEW

All of the data entry sheets are formatted with same general structure. To make data entry easier, the freeze panes feature is activated so important identifiers and headers are always visible no matter how far you scroll in any direction.

Because there are a lot of data elements in this Excel Dashboard, we have divided the data entry among different sheets to make it easier to navigate and use. Each data entry sheet is also color-coded so that you can quickly recognize which page you are on.

There are **seven** data entry sheets that correspond to different types of data:

- **Participant & Referral List** (**page 16**): this is where you will enter the name, identifiers, and other basic information on all individuals who have been admitted to or referred to your program. Start here when adding information on a new participant or referral.
- **Intake Screening** (**page 21**): participant information typically collected at intake, such as housing status at intake, highest educational attainment, employment at intake, referral information, and other details of program acceptance.
- **Risk, Need, and Treatment** (**page 22**): information related to participant risk and need level, as well as information about substance use, mental health diagnoses, and referrals to treatment.
- **Phase Tracker** (**page 25**): participant phase start and end dates.
- **Jail Sanctions** (**page 26**): start and end dates of jail sanctions.
- **Exit Screening** (**page 27**): information typically collected at exit, such as housing status, current employment status, risk and need levels, and rearrest information.
- **Additional Info** (**page 29**): provides customizable space to track additional information not captured in the other data entry sheets.

To add participant information to the Excel Dashboard, you must first add the individual to the *Participant & Referral List* sheet. By entering basic information about the individual (e.g., name, ID number), the Excel Dashboard will automatically create a unique identifier that links an individual's information across the six sheets. You may then proceed to any of the subsequent sheets in any order. You will only have to enter the individual's name and ID once, as you will choose the name and ID from a drop-down menu on subsequent pages. See **page 16** on creating the unique ID and **page 10** for step-by-step instructions on entering a new participant.

There are sheets of the dashboard where there should only be one row per person (e.g., intake information) and others where there will be multiple rows of data all for the same person (e.g., jail sanction start and end dates). If you have an individual that has been referred to your program more than once or has entered more than once, see the section on **page 17** for guidance on how to track these individuals.

Data entry sheets with one row per individual (per entry or referral to your court):

- Participant & Referral List
- Intake Screening
- Risk, Need, & Treatment
- Phase Tracker
- Exit Screening

Data entry sheets that can have multiple rows of data for each entry or referral to your court:

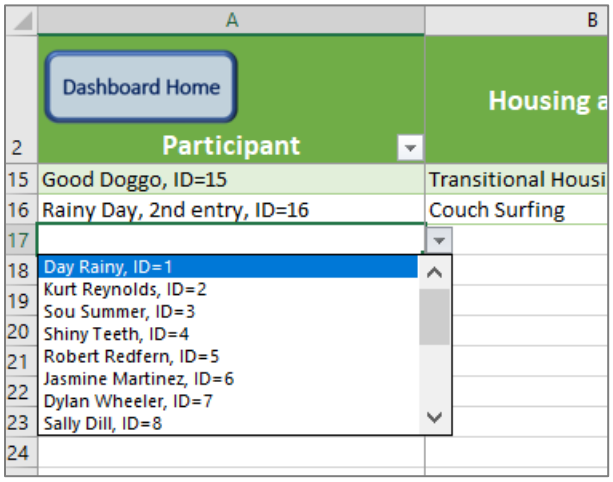
- Jail Sanctions
- Additional Info

EXCEL DASHBOARD DATA ENTRY FEATURES

The usefulness of the Excel Dashboard is determined by the quality of the data entered. The better the data (well-populated, accurate, wide-ranging), the greater insights it will provide. Therefore, we have equipped your Excel Dashboard with features to help limit data entry errors.

Auto-Generated Unique Identifier

To connect all the sheets of the Excel Dashboard together in the background, there must be an identifier present on each sheet that is unique to an individual. Using name alone is not sufficient, and it is recommended that two to three pieces of information be used to create a truly unique identifier (name, date of birth, treatment court ID, etc.). On the other hand, repeating this amount of information on every single data entry sheet would be a significant time burden. To alleviate this burden, we have created an auto-generated unique identifier that combines the individual's first and last names, treatment court ID, and a brief notes field. Once you enter an individual in the *Participant & Referral List* sheet, the auto-generated unique identifier will be automatically included in a drop-down menu on subsequent sheets. Simply click on the drop-down list and select the appropriate individual.

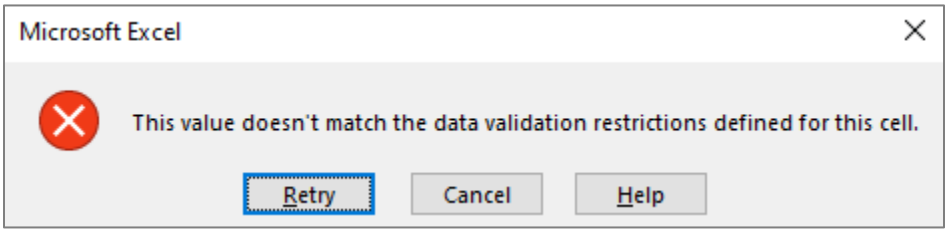


Data Validation and Drop-Down Lists

The data entry tables are embedded with data validation and drop-down lists which increase both the ease and accuracy of the data entry. This consistency also allows for useful analysis and dashboard visualizations.

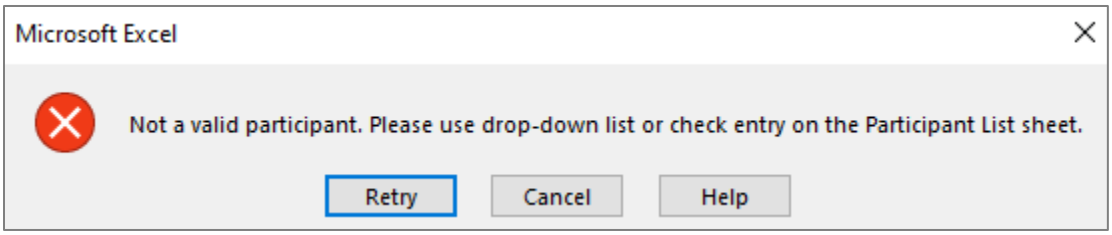
Data validation helps you to avoid entering errant values. There are several types of data validation rules throughout this workbook, all working to prevent erroneous data entry. Some data validation rules will force you to choose a value from the drop-down list only. Other examples of data validation will warn you if you have entered an illogical value (e.g., a date of birth prior to 1/1/1920, a program entry date prior to 1/1/1980) or dates in the future (e.g., 5/5/2084).

For invalid data entries like a response that is not included in a drop-down list or an incorrect date, you will receive the following message (or very similar message):



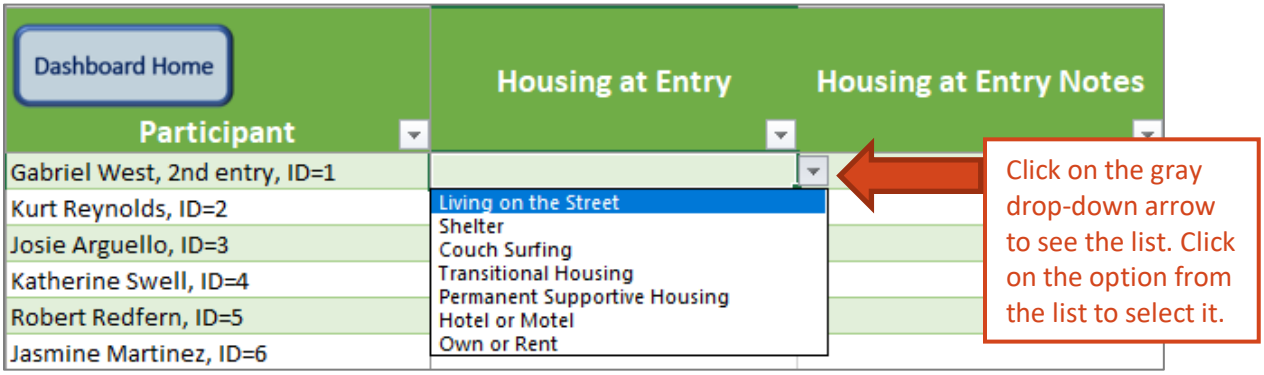
Select "Retry" and attempt entering the data again but within the defined data validation rules, therefore either the correct date or choose a response from the drop-down list.

If you attempt to add an individual that is not on the Participant & Referral List, you will receive the following error:



Select "Retry" and select the auto-generated unique identifier from the Participant drop-down list. See page 16 for more information about creating a unique participant identifier. Note that this data validation will only prevent you from inputting a unique ID that has not been created in the *Participant & Referral List* sheet. It will not notify you if you have incorrectly selected the unique ID for the participant from the drop-down list. Always double-check the *Participant & Referral List* sheet to verify you are using the unique identifier that corresponds to the correct individual.

Drop-down lists are another type of data validation that help users to enter information consistently. When you click on a cell to enter data, a drop-down arrow appears to the right of the cell. Click on the drop-down arrow the view the list. Select data from the drop-down list by clicking on the relevant option.



You can also use a keyboard shortcut, **Alt + the down arrow**, to initiate the drop-down list. Use the down arrow to scroll and press enter to select the value.

Throughout the data entry sheets, there are "Notes" sections where it is possible to expand on selected drop-down options. For instance, in the example above, it is possible to explain an individual's housing situation in more specific detail under the "Housing at Entry Notes" field.

Auto Calculations

Some fields are automatically calculated so that you do not have to manually count the number of days or weeks between two events. These fields include **Age at Entry**, **Length of Jail Sanction (Days)**, and **Weeks in Phase**. These fields are distinguished from other fields by shaded columns. **Do not try to manually fill in auto calculated data fields, but always review them.** These fields can act as a verification that the correct dates have been entered. If an individual appears to be 157 years old, an erroneous date may be to blame!

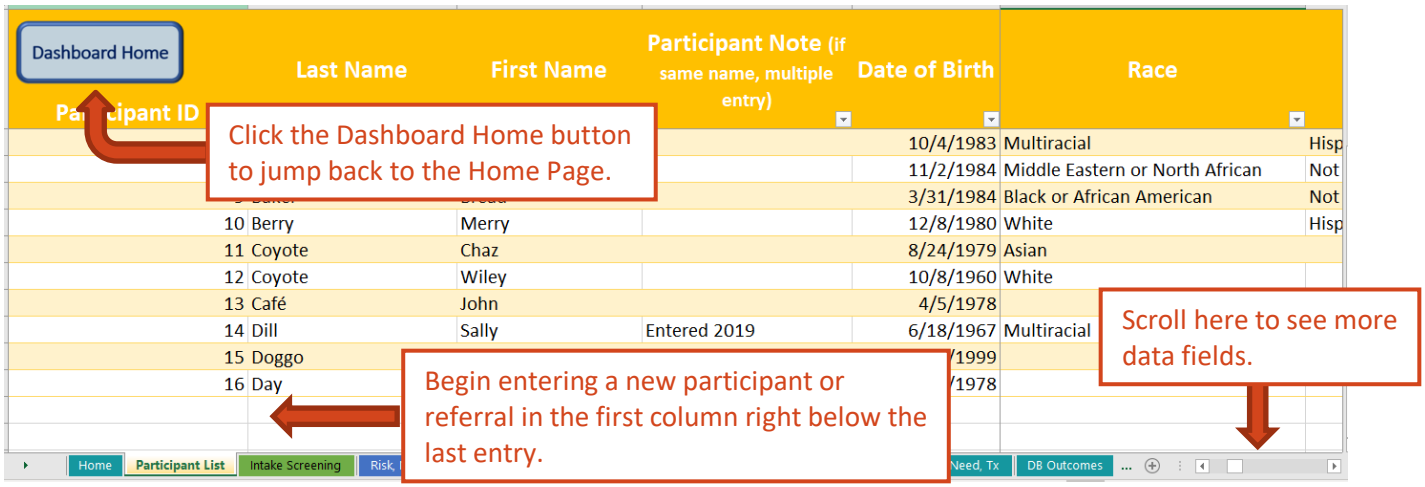
Ensure the Data has been "Captured"

It is important to make sure the data you have entered has been "captured" by Excel. You will notice that each data entry sheet has alternating shaded rows. This table formatting will automatically expand to include newly added information. To ensure the table automatically expands and captures your new data, **do not skip a row when adding a new participant or referral to a data entry sheet.** If information is entered consecutively, the tables will automatically expand to include a new participant. After adding the first piece of information, just hit Enter or Tab!

Captured data will appear inside the data table on the sheet. A quick way to visually check is to scan the sheet to see if the new rows of data mimic the colors of the data table. If they do, the table has expanded to capture the data. See **page 45** if you are having issues capturing data.

PARTICIPANT & REFERRAL LIST

This data entry sheet contains the name, date of birth, identification numbers, and other basic information on all individuals who have been admitted to or referred to your program. Other elements captured include demographics like age, race, gender, as well as information about problem solving court admission and exit dates. Court name, court type, and judicial district are also included on this sheet in the event that a coordinator manages multiple courts and would like to use one Excel Dashboard for all of their sites.



Reminder: there should only be one row per person on this sheet (unless an individual was referred or entered your program more than once)

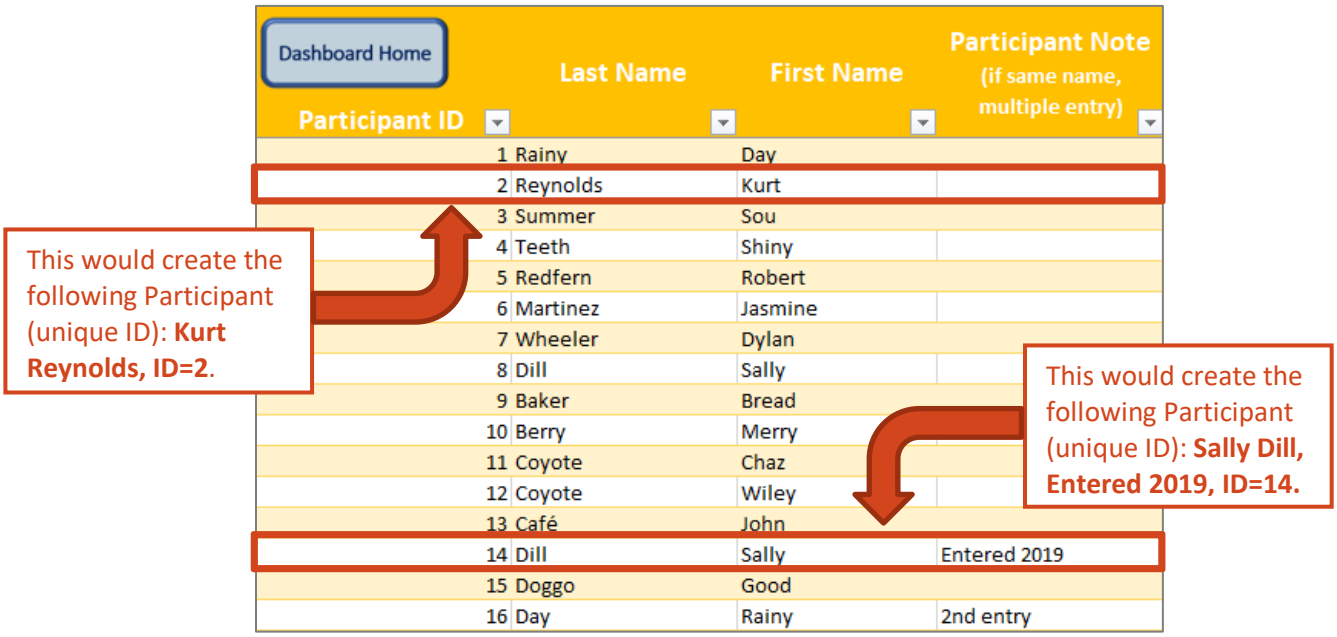
Creating a Unique Participant Identifier

Since data entry is divided over seven different sheets, there must be a unique identifier on each data entry sheet that links all of the data together. As you may already know, just first and last name alone are insufficient or even unhelpful for this task as there are a lot of common names. In this Excel Dashboard, we have created a unique identifier called **Participant** that is the combination of the following pieces of information:

- Participant ID
- Last Name
- First Name
- Participant Note (if same name, multiple entry)

This identifier will be automatically created for you as soon as you enter the information above. As you progress through subsequent data entry sheets, you will be able to select this unique participant identifier from a drop-down list as opposed to entering this information on every single data entry sheet.

Participant Note (if same name, multiple entry) is a tool for you to use to clarify which individual the unique Participant identifier refers to if it is unclear, such as instances of different participants with similar names or an individual with multiple entries. This will minimize the risk of selecting the incorrect unique participant identifier when entering data as it will appear in the subsequent data entry sheets.

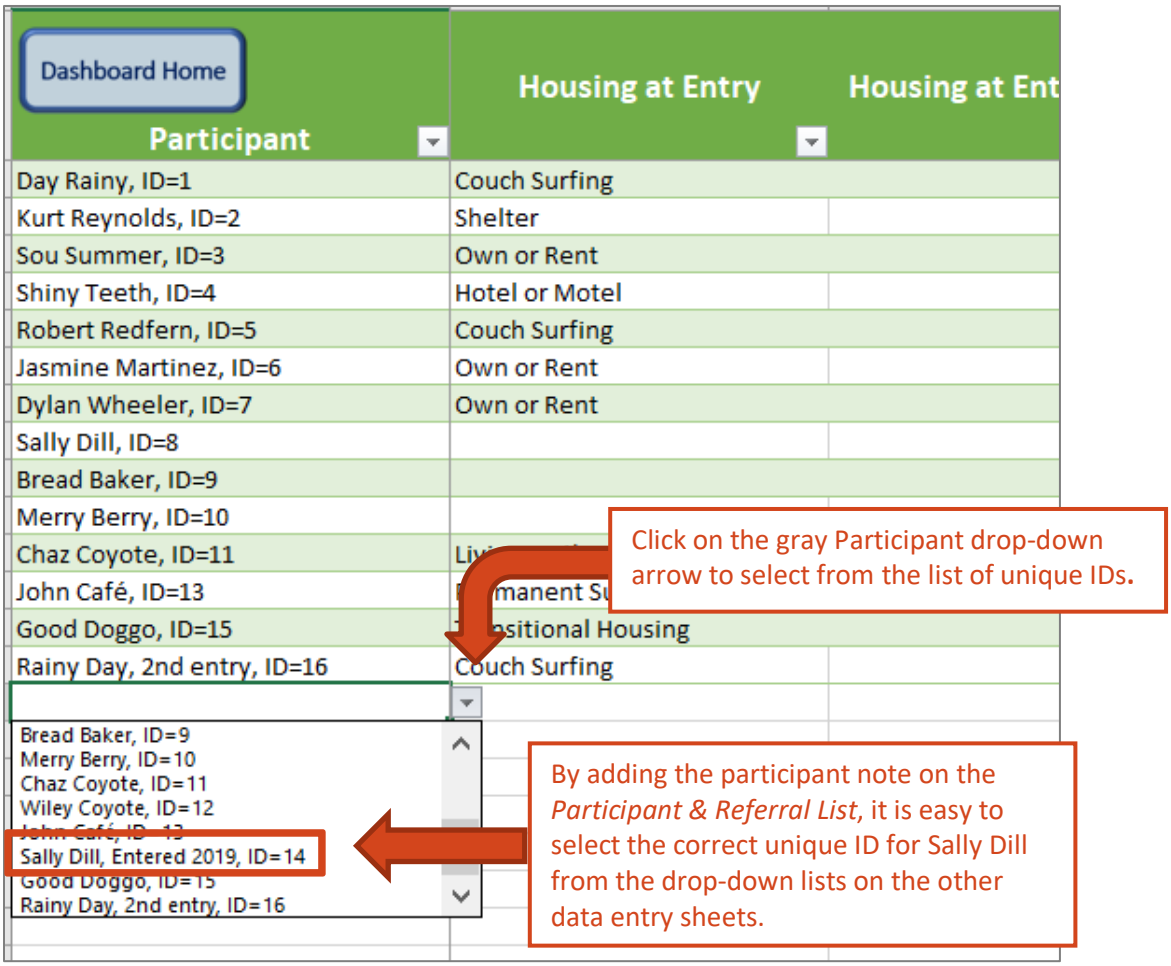


Guidance on how to use the notes field to distinguish treatment court entries:

1. **Same name shared by different individuals:** If two individuals have the same name, include a brief note to distinguish the individuals. This could include the individual's age at entry, date of birth, date of referral to the program, the program entry year, or other noted data elements. The element you use to differentiate individuals with the same name will be case specific. In the example above, two individuals were referred to the program named "Sally Dill." To differentiate them, I added the note, "Entered 2019" to the second Sally Dill.
2. **Multiple referrals or admissions to the program for one individual:** In rare instances, individuals may be referred to your program more than once, or an individual may be admitted to your program for a second time (e.g., for a new arrest). If an individual is referred multiple

times or is admitted to your program more than once, make a new entry each time the individual is referred or admitted. **There should be one row per referral or admission to the program.** You can use the Participant Note field to distinguish between each referral or entry. In the example above, the note "2nd entry" was used to identify Rainy Day's second admission into the program.

Use the unique identifier (Participant) created on the Participant & Referral List in the subsequent data entry tabs. You can select the correct Participant in the first column on each data entry sheet from the drop-down list.



Another way to select the correct unique identifier more easily is to sort the data on the *Participant & Referral List* sheet. This can be done several ways, including by referral date, alphabetical order, by court type, etc. See **page 51** on sorting data in a table. The order that the data appears on the

Participant & Referral List sheet is the order that the unique identifiers will appear in the Participant drop-downs on the other data entry sheets.

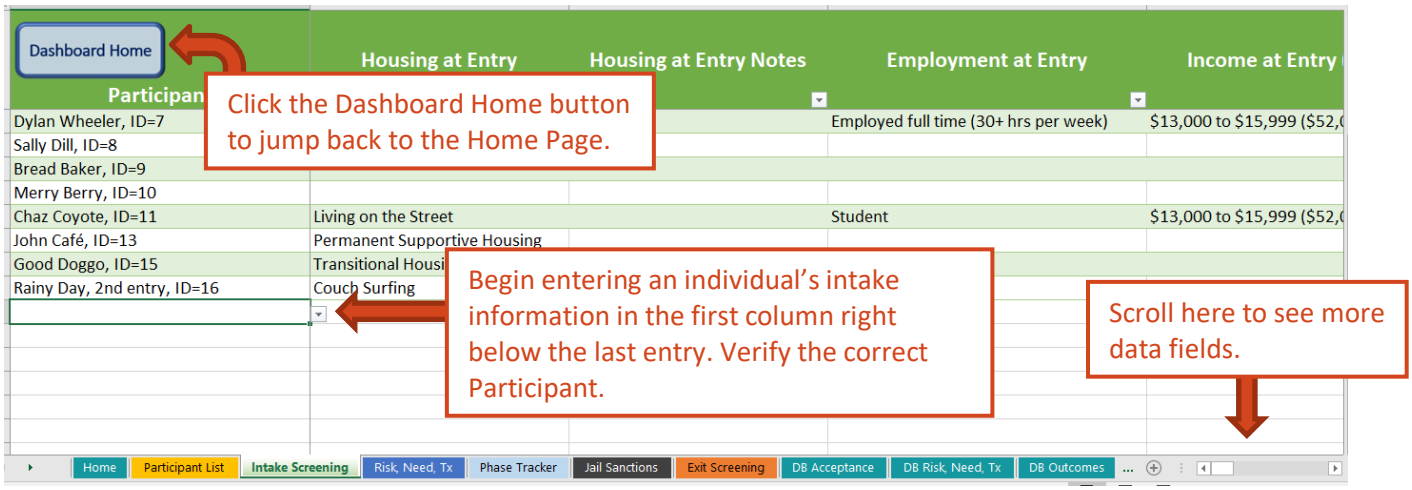
Definitions of Key Data Elements: Participant & Referral List

Variable	Use
Participant ID	A numeric or alphanumeric identifier created for the participant. This identifier is up to the discretion of each problem-solving court to create. If you have an existing identifier that you use to track participants in other databases, you may want to list that ID here. **This ID must be unique to the participant.**
Participant Note (if same name, multiple entry)	A column to distinguish between participants more easily. For example, if two participants have the same name or a participant has entered the program multiple times, this section is available to use to make selecting the Unique ID ("Participant") on the following tabs easier.
Case Number	The court case number that led to referral to the problem-solving court.
County	The county the court case was filed in.
Race	Options to select include American Indian or Alaska Native, Black or African American, Asian, Middle Eastern or North African, Native Hawaiian or Pacific Islander, White, Multiracial, and Other Race Not Listed. Only one option can be selected. If a participant identifies as more than one race, please use Multiracial. Please note that race is a socially constructed classification that is not based on biology and should be determined by the participant.
Ethnicity	Options to select include Hispanic/Latinx and Not Hispanic/Latinx. For purposes of dashboard reporting, Hispanic/Latinx ethnicity overrides any other race selection (e.g., an individual marked as "White" and "Hispanic/Latinx" will appear as Hispanic/Latinx in any graph related to race and ethnicity). Please note that ethnicity is broader than race and is typically used to describe groups of people based on their cultural expression and identification (e.g. food, language, religious beliefs, etc.). This should also be determined by the participant.
Gender	Options to select include Male, Female, or Other. Please note that gender identity refers to how the individual describes themselves and does not always reflect their biological sex. It is to be determined by the participant.
Program Entry Date	The day the participant was admitted to the program. MM/DD/YYY format.
Admission Type	Whether the participant is being admitted into the program for the first time, or whether they have previously entered the program (this specific program, not another treatment court).

Variable	Use
Program Exit Date	The date of official problem-solving court discharge (this may or may not be the same as the date of discharge from probation). MM/DD/YYY format.
Program Status	The participant's status in the program. Continually update as their status changes.
Program Status Codes	Options include: ACTV, AWO, DCFL, DCGO, DCGP, DCOT, and DNE. ▶ ACTV – active ▶ AWO – absconders (AWOL) ▶ DCFL – terminated (failure) ▶ DCGO – graduated, supervision terminated ▶ DCGP – graduated, continued supervision ▶ DCOT – other exit ▶ DNE – did not enter
Warrant Date	If the participant is currently on warrant status, the date the warrant status went into effect.
Termination Reason	If terminated from the program, reason. Options include: ▶ Absconded – the participant absconded from the program ▶ Lack of progress – the participant was terminated due to lack of progress in treatment or in the program (e.g., repeat positive drug screens, noncompliant behavior, etc.) ▶ RTEC – probation revoked, new technical violation ▶ RNOF – probation revoked, new felony arrest ▶ RNOM – probation revoked, new misdemeanor arrest ▶ Other – participant terminated for other reason not listed above.
Age at Entry	The age of the individual when they were admitted into the program. It is calculated as the difference in years between the program entry date and the participant's date of birth.
Age Range	The age range of the participant at entry (used for dashboard reporting).
Program Track	If your program has multiple tracks (e.g., high risk, DUI offenders, mental health, etc.), indicate the track the participant is on. If your program does not have any tracks, you may leave this blank.

INTAKE SCREENING

The is where you input information typically gathered at intake. This includes details on individuals such as their housing, education, income, and employment at referral, as well as the triggering arrest, referral information, and program acceptance. **Individuals should not be repeated on separate rows in this sheet** (unless they happened to enter your program multiple times). Always double-check the *Participant & Referral List* sheet to verify you are using the unique identifier that corresponds to the correct individual.



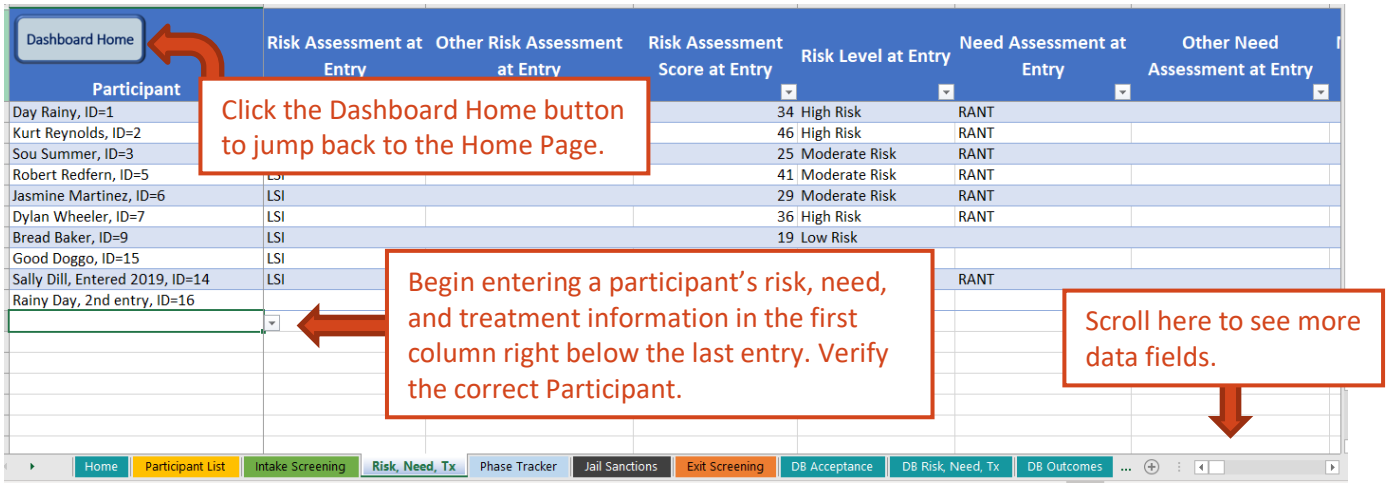
Definitions of Key Data Elements: Intake Screening

Variable	Use
Housing at Entry Notes	Include greater specifics on the participant's living situation not captured by the *Housing at Entry* field. Examples could include: "living with sister, Barbara" or "alternates between living in a hotel and shelter."
Triggering Arrest Charge Class	Select the most severe charge on the triggering arrest. Options include: Misdemeanor unclassified, Misdemeanor class 1, Misdemeanor class 2, Misdemeanor class 3, Drug Misdemeanor level 1, Drug Misdemeanor level 2, Felony unclassified, Felony class 1, Felony class 2, Felony class 3, Felony class 4, Felony class 5, Felony class 6, Drug Felony level 1, Drug Felony level 2, Drug Felony level 3, Drug Felony level 4, Other.
Triggering Arrest Drug or DUI-Related	Indicate whether the triggering arrest was drug or DUI-related. Options include: Yes, No, or Don't Know. Drug-related can include: ▶ Violations of laws prohibiting or regulating the possession, distribution, or manufacture of illegal drugs. ▶ Offenses in which the drug's pharmacological effects contribute.

	▶ Offenses that are motivated by the user's need for money to support continued use. ▶ Offenses connected to drug distribution itself.
Triggering Arrest Domestic Violence Related	Indicate whether the triggering arrest involved an incident of domestic violence. Options include: Yes, No, or Don't Know.
Triggering DUI Type	If the triggering arrest that led to referral to a PSC was a DUI, indicate the type of DUI here. Options include: Alcohol, Benzodiazepines, Cocaine, Hallucinogens, Inhalants, Marijuana, Methamphetamine, Opioids (inc. Heroin), Other Stimulant, Other, and N/A.
Triggering DUI BAC	If the triggering arrest that led to referral to a PSC was a DUI, indicate the individual's BAC level.
Number of All Prior DUIs	Indicate the total number all prior DUI offenses against the individual.
Plea Date	Indicate the Plea Date for the triggering arrest charge.
Program Acceptance	Whether or not the individual was accepted into your problem solving court. Options include: Accepted, Not Accepted, or Other. Other could include those accepted but put on a waitlist, declined to enter, a change in circumstances, etc.
Reason Not Accepted	If not accepted into your problem solving court, indicate the reason. Options include: Admitted to another TC program, Case dismissed, Defendant opted out, Judicial override, Medical needs, Mental health needs, Not eligible – low risk or need level, Not eligible – other exclusionary program criteria, Staff decision (prosecutor, judge, team), Waitlisted, Warrants in other jurisdictions, and Other.
Program Acceptance Notes	Provides space to expand on in greater detail why an individual was accepted or not accepted into the program.

RISK, NEED, & TREATMENT

Enter all participant data related to risk, need, and treatment in program on the *Risk, Need, & Tx* sheet. This ranges from information on risk and need assessments, substance use, mental health diagnoses, recommended treatment at entry, actual treatment at entry, and overall treatment completion. **Individuals should not be repeated on separate rows in this sheet** (unless they happened to enter your program multiple times and have a different ID). Always double-check the *Participant & Referral List* sheet to verify you are using the unique identifier that corresponds to the correct individual.



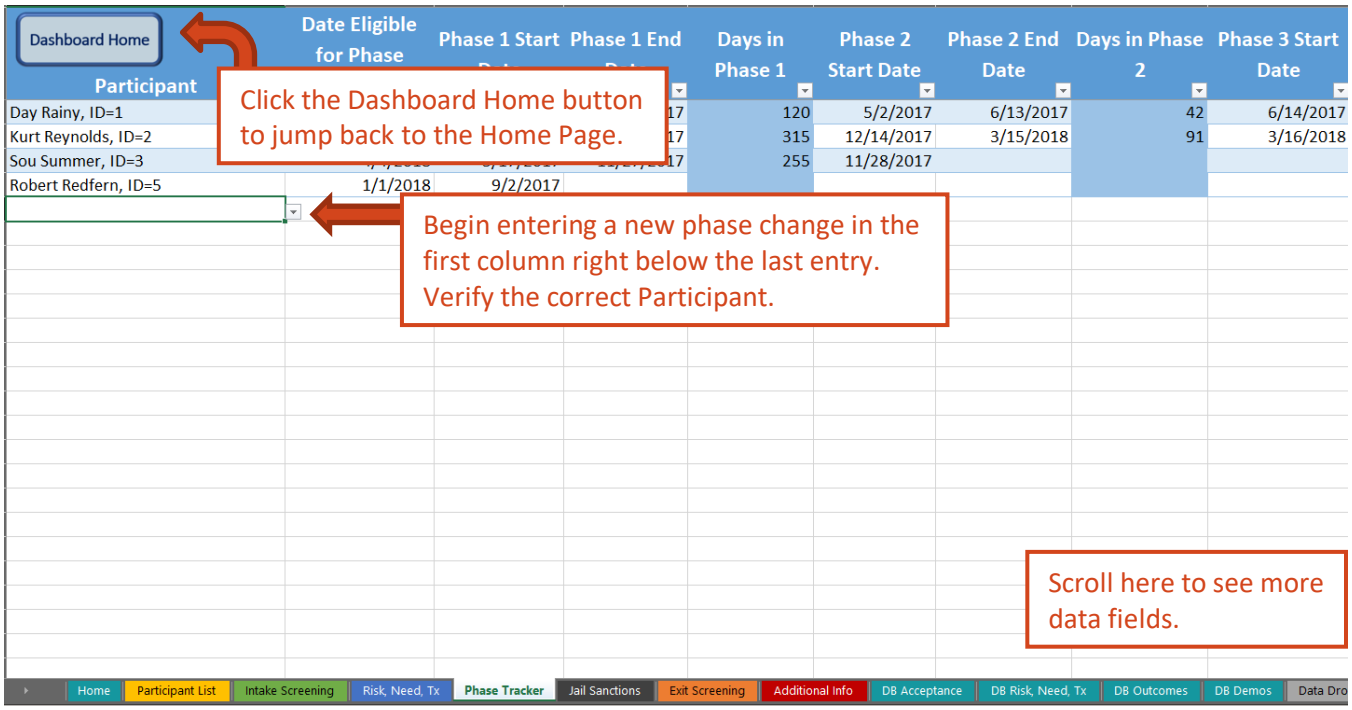
Definitions of Key Data Elements: Risk, Need, & Treatment

Variable	Use
Substance Use (#1-3)	Indicate the substances used by the participant. Options include: Alcohol, Benzodiazepines, Cocaine, Hallucinogens, Inhalants, Marijuana, Methamphetamine, Opioids (inc. Heroin), Other Stimulant, Other, and N/A.
Co-Occurring Disorder	A space to indicate whether a participant has both a substance use and a mental health disorder.
MH Diagnosis Disorder Category (#1-4)	The category of the participant's diagnosed mental health issue according to the DSM-5 Classification from the American Psychological Association. The list below is followed by some common examples of disorders that fall within that category. Please visit psychiatry.org for more information on DSM-5 classifications. ▶ **Anxiety** – Generalized Anxiety Disorder, Substance/Medication-Induced Anxiety Disorder, Panic Disorder (Panic Attack), Separation Anxiety Disorder, Social Anxiety Disorder (Social Phobia), Specific Phobia, Agoraphobia, etc. ▶ **Bipolar and Related** – Bipolar I Disorder, Bipolar II Disorder, Cyclothymic Disorder, Substance/Medication-Induced Bipolar and Related Disorder, Unspecified Bipolar and Related Disorder, etc. ▶ **Depressive** – Disruptive Mood Dysregulation Disorder, Major Depressive Disorder, Persistent Depressive Disorder (Dysthymia), Premenstrual Dysphoric Disorder, Substance/Medication-Induced Depressive Disorder, etc. ▶ **Disruptive/Impulse Control/Conduct** – Oppositional Defiant Disorder, Intermittent Explosive Disorder, etc.

Variable	Use
	▶ **Dissociative** – Dissociative Identity Disorder, Dissociative Amnesia, Depersonalization/Derealization Disorder, etc. ▶ **Neurocognitive** – Delirium, Major or Mild Neurocognitive Disorders, etc. ▶ **Neurodevelopmental** – Intellectual Disabilities, Communication Disorders, Autism Spectrum Disorder, Attention-Deficit/Hyperactivity Disorder, Specific Learning Disorder, Motor Disorders, etc. ▶ **OCD and Related** – Obsessive-Compulsive Disorder, Body Dysmorphic Disorder, Hoarding Disorder, Trichotillomania (Hair-Pulling Disorder), Substance/Medication-Induced Obsessive-Compulsive and Related Disorder, etc. ▶ **Personality** – General Personality Disorder, Paranoid Personality Disorder, Schizoid Personality Disorder, Schizotypal Personality Disorder, Antisocial Personality Disorder, Borderline Personality Disorder, Narcissistic Personality Disorder, Avoidant Personality Disorder, Dependent Personality Disorder, Obsessive-Compulsive Personality Disorder, etc. ▶ **Schizophrenia/Psychotic** – Schizophrenia, Schizotypal (Personality) Disorder, Delusional Disorder, Brief Psychotic Disorder, Schizophreniform Disorder, Schizoaffective Disorder, Substance/Medication-Induced Psychotic Disorder, Psychotic Disorder Due to Another Medical Condition, etc. ▶ **Sleep-Wake** – Insomnia Disorder, Hypersomnolence Disorder, Narcolepsy, etc. ▶ **Trauma/Stressor Related** – Posttraumatic Stress Disorder (PTSD), Reactive Attachment Disorder, Disinhibited Social Engagement Disorder, Acute Stress Disorder, Adjustment Disorders, Other Specified Trauma and Stressor Related Disorder, Unspecified Trauma and Stressor-Related Disorder, etc. ▶ **Other** – Other diagnosed mental health disorders not captured above.
MH Diagnosis Notes (#1-4)	A field to provide extra context or greater specificity on the participant's mental health diagnosis.
Overall Treatment Completion Status	Indicates whether the participant completed all assigned treatment while in the program.

PHASE TRACKER

Follow every phase advancement of a participant while in the program, including the, the start date, the end date, the days in the phase, and the date the participant is eligible for a phase change with the *Phase Tracker* sheet. **Individuals should not be repeated on separate rows in this sheet** (unless they happened to enter your program multiple times and have a different ID). Also, always double-check the Participant & Referral List sheet to verify you are using the unique identifier that corresponds to the correct individual.

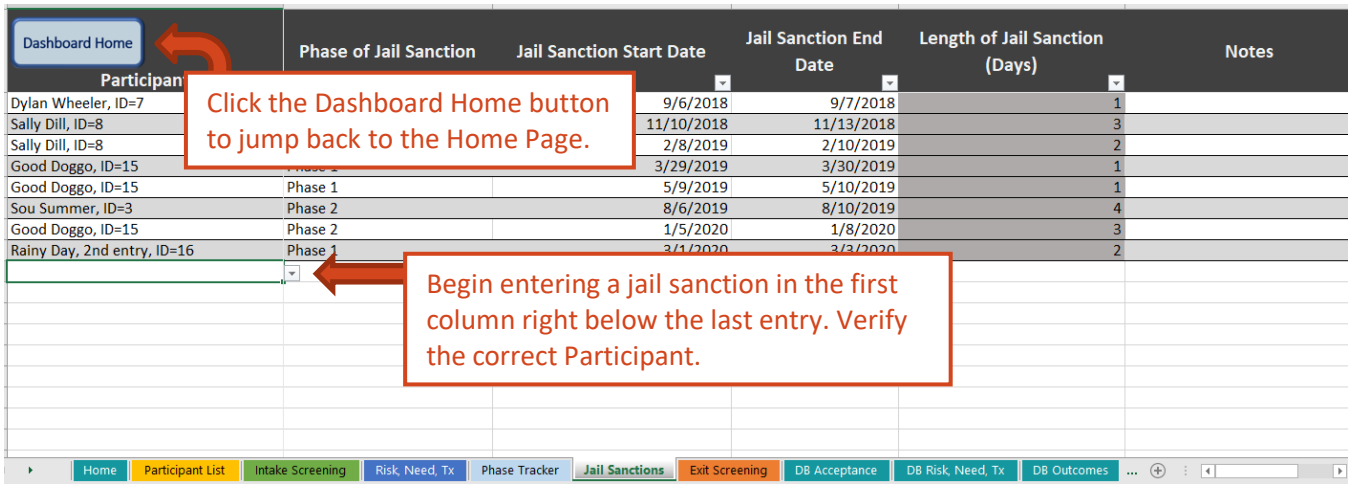


Definitions of Key Data Elements: Phase Tracker

Variable	Use
Date Eligible for Phase Change	The date the participant is eligible to change phases. This date will change with each phase advancement.
Days in Phase	The number of days the participant spent in that phase. This is determined by calculating the number of days between the Phase Start Date and the Phase End Date.

JAIL SANCTIONS

On the *Jail Sanctions* sheet, you can track every jail sanction received by a participant while in the program, including the phase of the jail sanction, the start date, the end date, and any notes. **Individuals may be repeated on multiple rows of this sheet when applicable (i.e., a participant receives multiple jail sanctions).** Also, always double-check the Participant & Referral List sheet to verify you are using the unique identifier that corresponds to the correct individual.



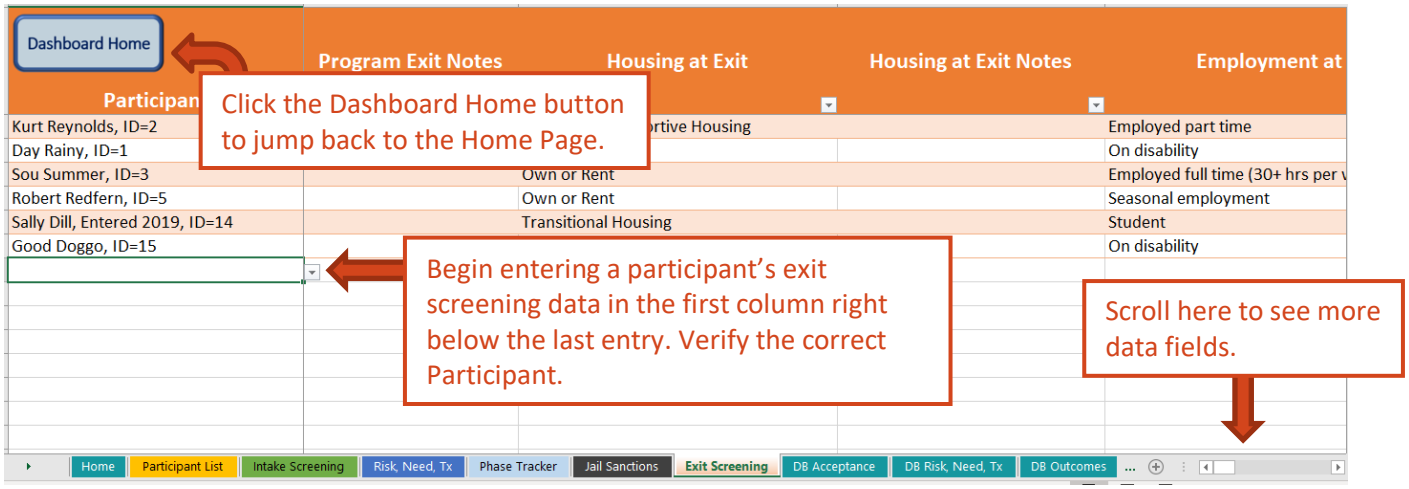
Participant	Phase of Jail Sanction	Jail Sanction Start Date	Jail Sanction End Date	Length of Jail Sanction (Days)	Notes
Dylan Wheeler, ID=7		9/6/2018	9/7/2018	1	
Sally Dill, ID=8		11/10/2018	11/13/2018	3	
Sally Dill, ID=8		2/8/2019	2/10/2019	2	
Good Doggo, ID=15		3/29/2019	3/30/2019	1	
Good Doggo, ID=15	Phase 1	5/9/2019	5/10/2019	1	
Sou Summer, ID=3	Phase 2	8/6/2019	8/10/2019	4	
Good Doggo, ID=15	Phase 2	1/5/2020	1/8/2020	3	
Rainy Day, 2nd entry, ID=16	Phase 1	3/1/2020	3/3/2020	2	

Definitions of Key Data Elements: Jail Sanctions

Variable	Use
Phase of Jail Sanction	The phase the participant is in when they received a jail sanction.
Length of Jail Sanction (Days)	The number of days of the participant's jail sanction determined by calculating the difference between the Jail Sanction Start Date and the Jail Sanction End Date.

EXIT SCREENING

The *Exit Screening* sheet contains information gathered after an individual's exit from the program. Specific data elements captured include information on housing, education, income, and employment at exit; risk and need assessments at exit; whether jail was ever used as a sanction during an individual's time in program; and in-program/post-program arrest information. **Individuals should not be repeated on separate rows in this sheet** (unless an individual enters your program more than once and they have a different ID). Also, always double-check the *Participant & Referral List* sheet to verify you are using the unique identifier that corresponds to the correct individual.



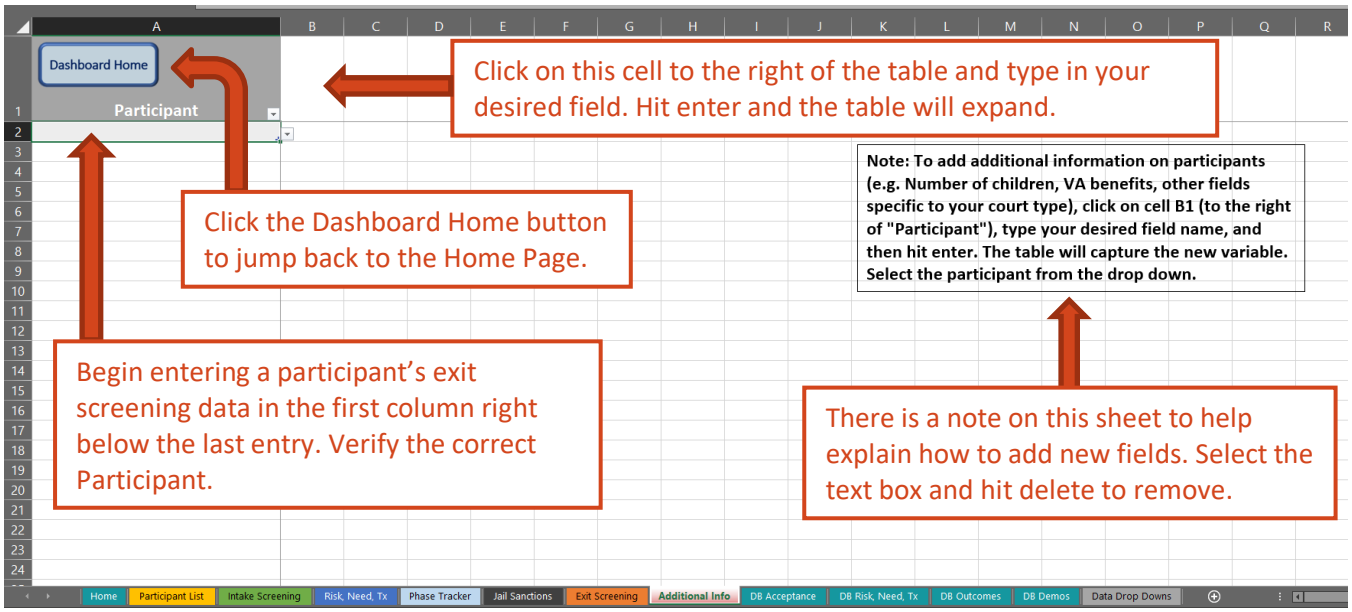
Definitions of Key Data Elements: Exit Screening

Variable	Use
Received a Jail Sanction while in Program	Indicates whether the individual ever received a jail sanction while in the program. Options include: Yes, No, or Don't Know. Note: this is the field that populates the graph in the Demographics Dashboard related to receiving a jail sanction while in program.
In-Program Rearrest	Indicates whether the participant was ever arrested during their time in the program. Options include: Yes, No, or Don't Know.
Rearrest Date *(first if multiple)*	Provide information on the first arrest if there were multiple. Use MM/DD/YYY format when entering the date. Repeat for both the first in-program arrest and the first post-program arrest.

Variable	Use
Rearrest Charge Class *(first if multiple)*	Enter the class of the most severe charge on the first arrest. The charge class includes the various classes of traffic misdemeanors, misdemeanors, and felony, as well as the different levels of drug misdemeanors and drug felonies. Repeat for both the first in-program arrest and the first post-program arrest.
Rearrest Drug or DUI-Related *(first if multiple)*	Indicate whether the rearrest directly or indirectly involved substances. Repeat for both the first in-program arrest and the first post-program arrest. Drug-related can include: ▶ Violations of laws prohibiting or regulating the possession, distribution, or manufacture of illegal drugs. ▶ Offenses in which the drug's pharmacological effects contribute. ▶ Offenses that are motivated by the user's need for money to support continued use. ▶ Offenses connected to drug distribution itself.
Rearrest Domestic Violence-Related *(first if multiple)*	Indicate whether the rearrest involved an incident of domestic violence. Options include: Yes, No or Don't Know. Repeat for both the first in-program arrest and the first post-program arrest.
Rearrest Conviction *(first if multiple)*	Indicate whether the described rearrest led to a conviction charge. Repeat for both the first in-program arrest and the first post-program arrest.
Participant Termination on Present Case	Indicate if the participant was terminated from your problem solving court due to the in-program rearrest. If a participant was terminated from your program based on a subsequent rearrest (e.g., the second in-program arrest), indicate "No" to this question and provide an explanation in the notes field (see next definition).
Other In-Program Rearrest Notes	A field to provide information on other in-program arrests beyond the first in the case of multiple in-program arrests. Try to include information captured in the other in-program arrest fields, including date, charge, class, and conviction.
Post-Program Rearrest within 1 Year of Program Exit	Indicates whether the participant was arrested within 1 year of exiting the program. Options include: Yes or No.
Other Post-Program Rearrest Notes	A field to provide information on other post-program arrests beyond the first in the case of multiple in-program arrests. Try to include information captured in the other post-program arrest fields, including date, charge, class, and conviction.

ADDITIONAL INFORMATION

The *Additional Info* sheet is entirely customizable to you and the needs of your program. This sheet provides the space to track additional information not captured in the other data entry sheets. **Individuals should not be repeated on separate rows in this sheet** (unless an individual enters your program more than once and they have a different ID). Also, always double-check the *Participant & Referral List* sheet to verify you are using the unique identifier that corresponds to the correct individual.



INTERACTIVE DASHBOARD

OVERVIEW

A dashboard is a tool used for program management. Much like the dashboard of a car, a data dashboard displays important information from multiple data sources in an easy-to-access place. Using data visualization, dashboards communicate important metrics to help users understand complex relationship in their data. The CO PSC Excel Dashboard has been developed based on metrics important to monitoring treatment court participant success.

There are **four** dashboard sheets:

- **Program Acceptance** (**page 35**): provides participant overview, social indicators at referral, triggering arrest information, program acceptance rate, and average days from triggering arrest to program entry.
- **Risk, Need & Treatment** (**page 38**): includes visuals related to participant risk and need levels at program entry, substance use, mental health, treatment referrals, and overall treatment completion.
- **Participant Outcomes** (**page 40**): displays graphics related to graduation rate, average time in program, risk and need at program exit, change in social indicators from entry to exit, and rearrest information.
- **Demographics** (**page 42**): highlights differences in key performance indicators by participant race, gender, and age, including program acceptance rates, graduation rates, treatment completion, use of jail as a sanction, and rearrests.

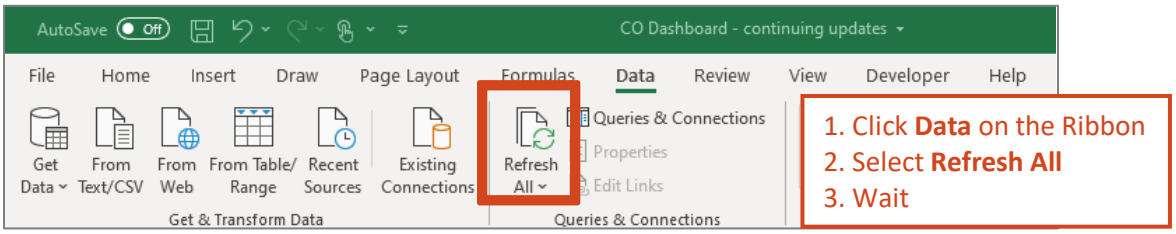
Typically, the colors of the dashboard sheet correspond to the data entry tab that it most heavily draws information from. For example, the *Participant Outcomes Dashboard* sheet is orange, just like the *Exit Screening* data entry sheet.

STRUCTURE

The interactive Dashboard sheets are powered behind the scenes using linked tables, formulas, and pivot tables.

Refresh

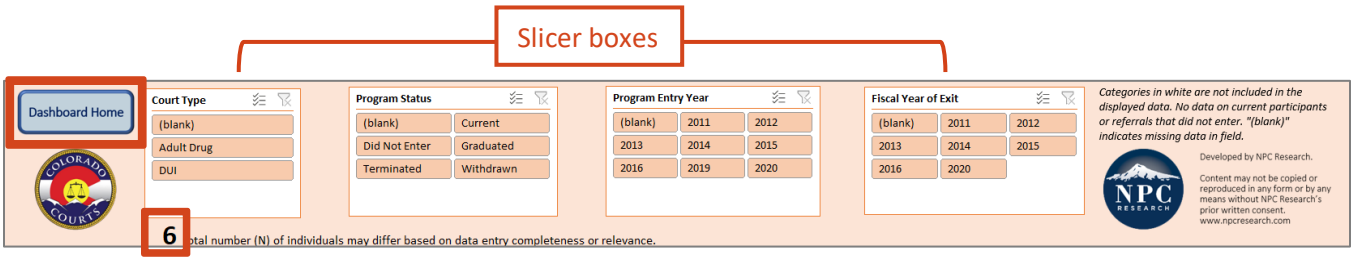
Refresh the Excel Dashboard after you have finished entering data. You do not need to update the dashboard every time you open the file, but after you add new participant information. This will update the formulas, tables, and dashboard graphics with up-to-date information from the data sheets. Click on the **Data** tab of the ribbon and select **Refresh All.**



Because of the many complex components and large number of graphics, it can at times take up to a minute to refresh the Excel Dashboard. Please be patient!

Header Bar

A header bar appears at the top of every dashboard sheet. It includes information and tools such as the Dashboard Home button, slicer boxes, as well as the overall count of individuals (N).



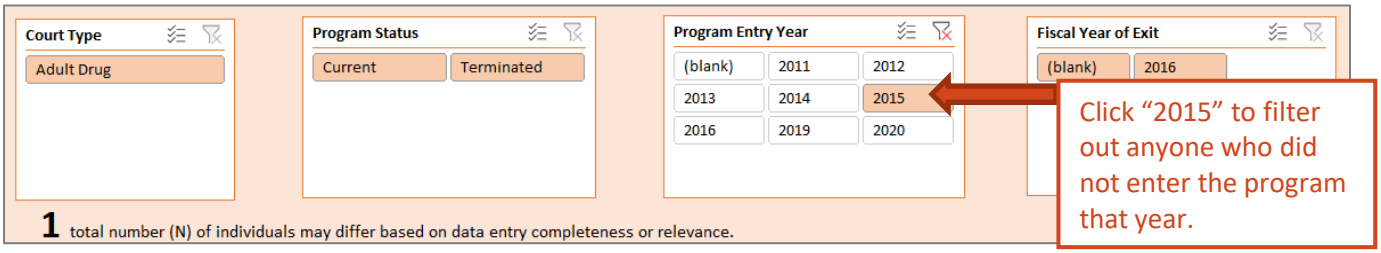
USING THE DASHBOARD

Filter with the Slicer Box

Each dashboard sheet can be filtered using any combination of the following data elements: Court Type, Program Status, Program Entry Year, and Fiscal Year of Exit. The dashboard has been pre-programmed with "slicer boxes" that appear in the header bar of each dashboard page. **Because of the many complex components and large number of graphics, it can at times take up to a minute to filter data after refreshing or opening the Excel Dashboard.** However, any subsequent filtering will not take as long.

Filtering by One Item

Say, for example, you are interested in only seeing information displayed for individuals who entered the program in 2015. Click on "2015" in the Program Entry Year slicer box. This will "filter out" any information on individuals who did not enter that year.



All other entry year options are now white, indicating that individuals that fit those criteria have been "filtered out" and the data displayed does not include their information. (One tip is to think of the white categories as "empty" or "inactive.") The other slicer boxes are more limited now as well – they are only displaying options that are left that can be filtered out.

You have the option to filter by multiple data elements simultaneously. For example, if you wanted to view only terminated participants of 2015, you would repeat the steps above by clicking on "Terminated" under Program Status. The data displayed will then be filtered to include only terminated participants that entered the program in 2015.

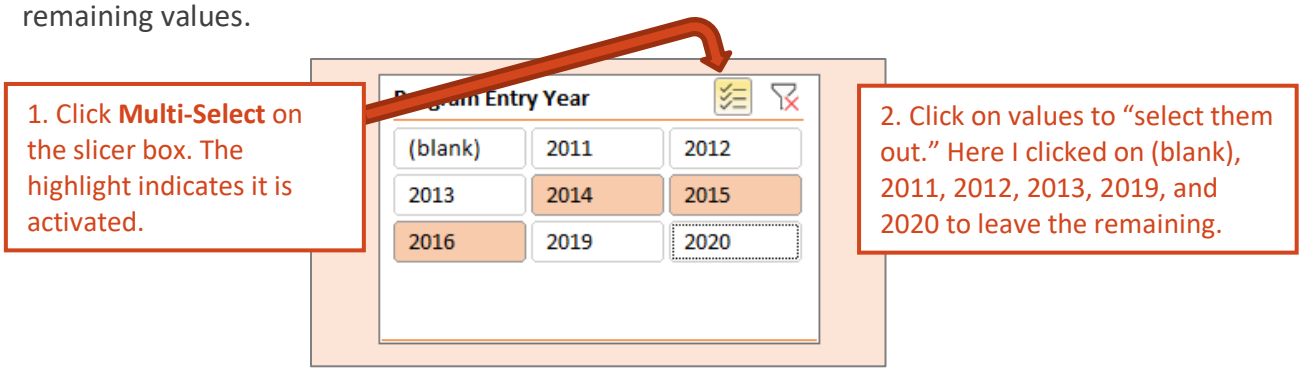
Filtering by Multiple Items (in same slicer box)

Filtering out using multiple options on the same slicer box is slightly different from the process mentioned above. Say, for example, you only want to look at information for individuals who entered the program between 2014 and 2016. You cannot just click on 2014, 2015, and 2016 to see all those

participants at the same time - the slicer box will default to whatever option was selected most recently.

There are two ways to filter by multiple items:

1. The fastest way to do this is to hold down the Ctrl key as you select the other filtering options **(Ctrl + *click*)**.
2. The second option is to click on the **Multi-Select** button in the upper right corner of the slicer box, shown below. This allows the user to "select out" certain values one-by-one and leave the remaining values.

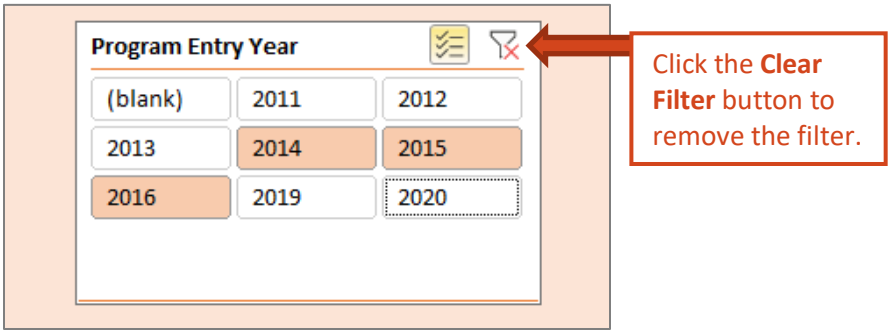


3. The third option is to click anywhere inside the slicer box and press (Alt + S). This will initiate the **Multi-Select** button, allowing the user to select multiple items. Proceed with the steps under option 2 to remove any categories you don't want to see displayed in the dashboard.

Clear a Slicer Filter

You can clear current slicer filter a few ways.

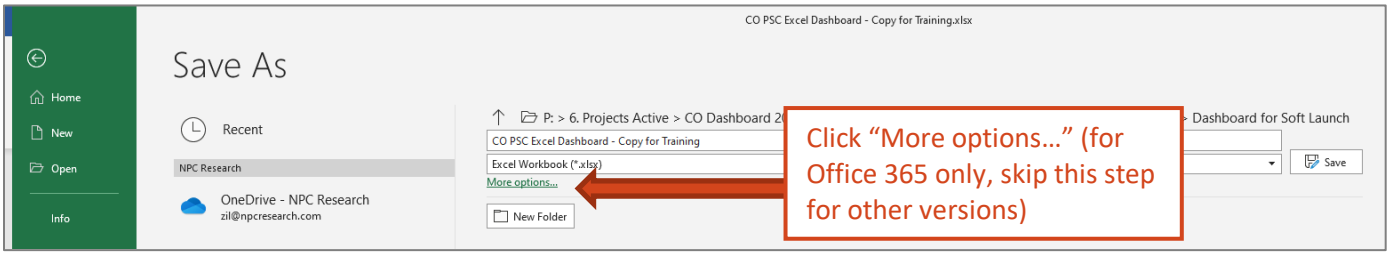
1. Click anywhere in the slicer box and press **(Alt + C)**.
2. Click the **Clear Filter** button in the upper right corner of the slicer box, shown below. This will remove the filter and select all available options in the slicer, filtering it all in.



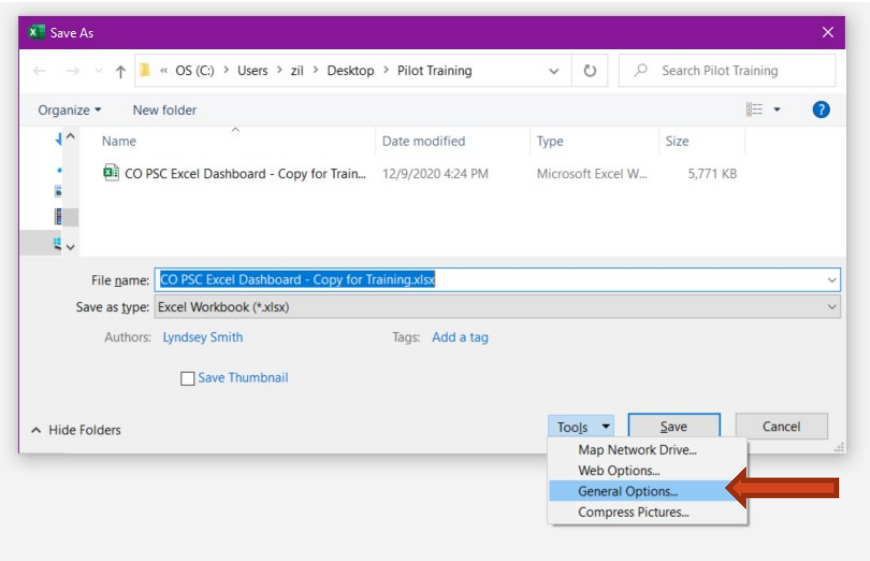
Sharing the Dashboard

The dashboard contains sensitive and confidential participant information. Therefore, only qualified team members should have access to the dashboard. Further, to ensure data integrity, it is recommended that only the team member(s) responsible for data entry should be able to enter data. Despite these limitations, it is still very easy to share insights with other team members. Below are different steps to sharing the dashboard:

- **Share the dashboard in read-only mode:** If you intend on sharing the dashboard with other team members, but do not want them to have the ability to edit the underlying data, you can share the dashboard with read-only privileges. To do so, open the dashboard and choose Save-As and select "More options…":

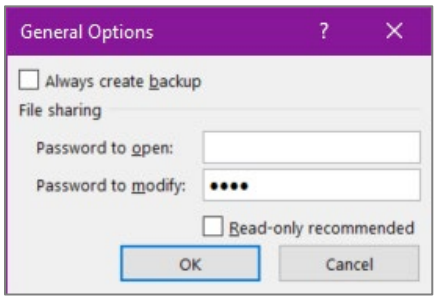


Click on the Tools drop-down menu (next to the Save button) and select "General Options…":



Enter a password in the second to **modify** the file. Leaving "Password to open" blank will allow anyone to open the file, but only those with the password to modify will be able to save changes. You may choose to set a password to open the file (e.g., for all team members) and set

a *different* password to modify the document (e.g., only the coordinator has the password to save). In this example, we will leave the first option blank so that anyone can open the file to view, but it will only open in read-only mode unless a password is entered.



Click OK, retype the password to confirm, and then click Save. To remove the password, follow the same steps, but when you see the prompt above, delete (or backspace) over the existing password.

It is important to **write down the password** and keep that in a secure location. **If you forget the password used to protect a sheet, you will not be able to open or edit the file.**

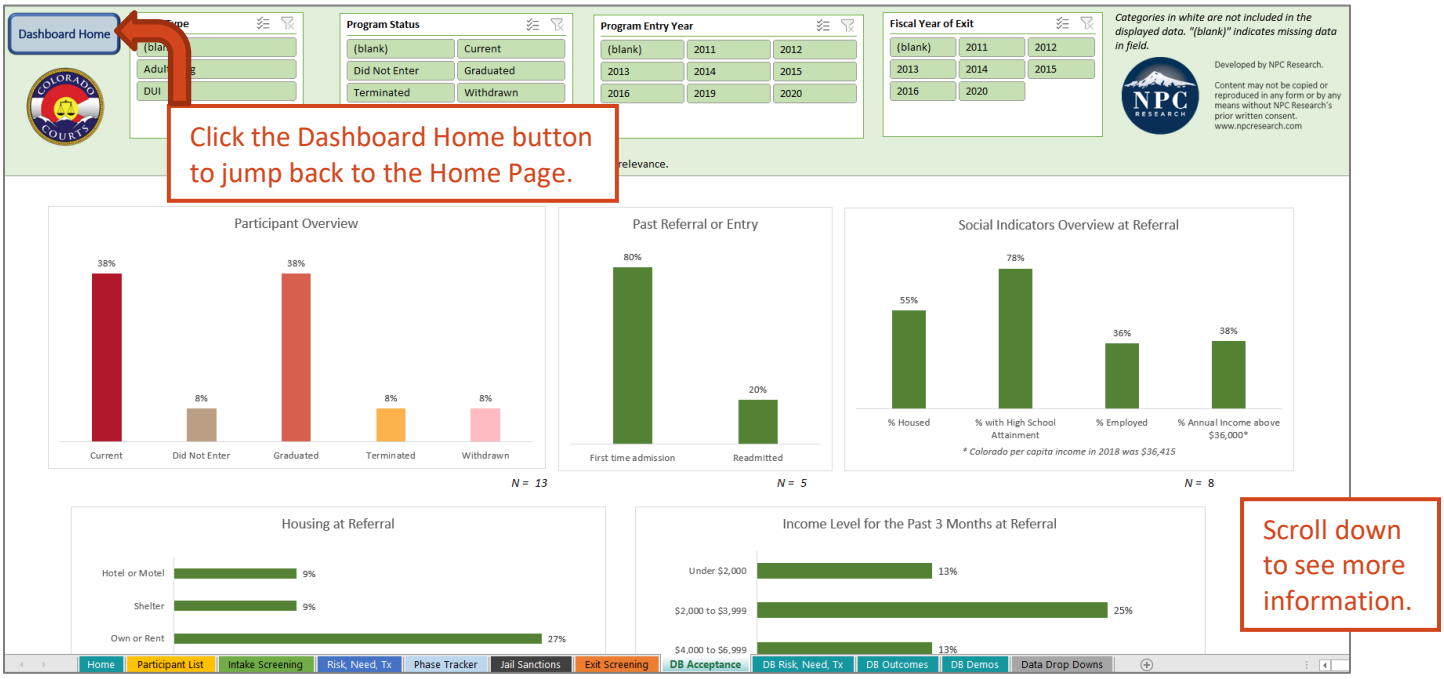
For further instructions on how to password-protect this Dashboard, please visit: **https://support.microsoft.com/en-us/office/protect-an-excel-file-7359d4ae-7213-4ac2-b058-f75e9311b599**

- **Copy a graph:** To copy a graph into another document or into an email to share internally, it is recommended to select **Save as Picture** rather than Copy. Typical copying and pasting pastes an embedded or linked graphic, meaning it will change as you adjust filters in the Excel Dashboard even after you have pasted it. To prevent this, select Save as Picture. Do not email the entire dashboard. This jeopardizes individuals' confidentiality.
- **Print a dashboard sheet:** The Excel Dashboard sheets also have pre-formatted printing settings, making it easy to print and share at team meetings. These settings include a title, page numbers, and a set printing area so no visuals are cut off. Note that the document will not indicate if any filters were activated so make sure to make a note before printing.
- **Screen-share virtually:** While most of the world is still working remotely, many virtual meeting platforms have screen-sharing capabilities. This provides another easy way to share the dashboard with more teammates in real time.

Reminder: This content was developed by NPC Research specifically for use by Colorado problem solving courts. Do not distribute copies of this dashboard to another court outside of Colorado.

PROGRAM ACCEPTANCE DASHBOARD (AKA DB ACCEPTANCE)

The *Program Acceptance Dashboard* data visuals include participant overview, social indicators at referral, triggering arrest information, program acceptance rate, and average days from triggering arrest to program entry.



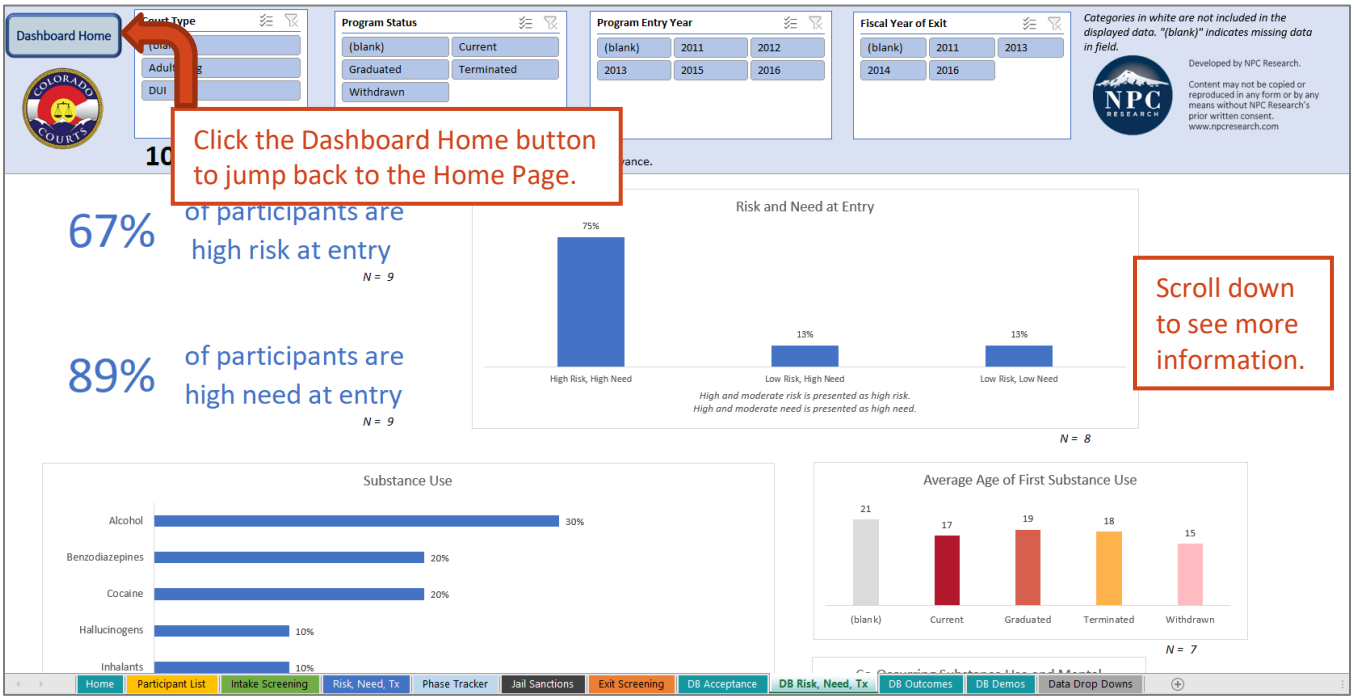
Definitions of Key Dashboard Elements: Program Acceptance

Variable	Use
Total N	A count of the total **number** of individuals entered on the *Participant & Referral List* data entry sheet. May not reflect the number of individuals in the subsequent graphics. Graphics will differ based on data entry completeness or relevance.
Social Indicators Overview at Referral	This graph gives an quick overview of 4 important indicators: ▶ % Housed: Total individuals indicated as living in Transitional Housing, Permanent Supportive Housing, Hotel or Motel, or Own or Rent, divided by the total individuals with complete education information (does not include

Variable	Use
	missing). Unhoused includes those indicated as Living on the Street, in a Shelter, or Couch Surfing. ▶ % with High School Attainment: Total individuals indicated as a High School Graduate or GED, Some college (no diploma), an Associates or vocational/technical degree, or a Bachelors, masters, doctorate, or other advanced degree, divided by the total individuals complete education information (does not include missing). Those without High School attainment includes individuals noted as achieving Less than 12th grade. ▶ % Employed: Total individuals indicated as either Employed full time (30+ hrs per week), Employed part time, or with Seasonal employment, divided by the total individuals with complete employment information (does not include missing). Those not employed includes individuals indicated as Unemployed, a Student, a Stay at home parent, those who are Retired, and those On disability. ▶ % Annual Income above $36,000: Total individuals whose Income at Entry (last 3 months) is indicated as earning $9,000 to $12,999 ($36,000 to $51,999 annually) or more, divided by the total individuals with complete income information (does not include missing). $36,000 is used as an indicator of overall welfare given Colorado's per capita income in 2018 was $36,000. Per capita income measures the average income eared per person which is generally calculated by dividing total income by total population.
Program Acceptance Rate	Total number of participants accepted into the program divided by the number of individuals either accepted or not accepted to the program. Does not include those whose Program Acceptance is indicated as Other or missing.
Average Days from Triggering Arrest to Program Referral	The average number of days between the Referral Date and the Triggering Arrest Date. Does not include individuals missing a Referral Date or Triggering Arrest Date.
Average Days from Program Referral to Program Entry	The average number of days between the Program Entry Date and the Referral Date. Does not include individuals missing a Program Entry Date or Referral Date.
Average Days from Triggering Arrest to Program Referral	The average number of days between the Program Entry Date and the Triggering Arrest Date. Does not include individuals missing a Program Entry Date or Triggering Arrest Date.

RISK, NEED, & TX DASHBOARD (AKA DB RISK, NEED, TX)

The *Risk, Need, & Tx Dashboard* data visuals include risk and need at program entry, substance use, mental health, treatment at entry, and overall treatment completion.



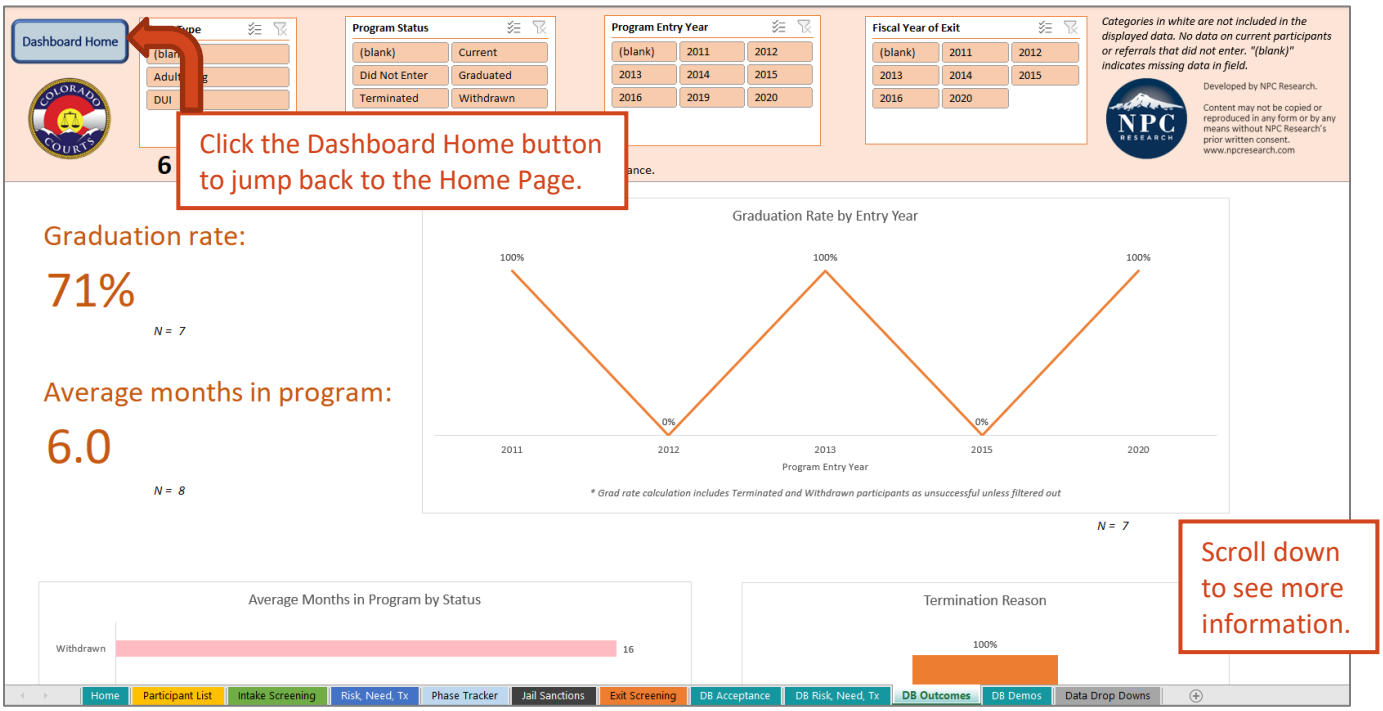
Definitions of Key Dashboard Elements: Risk, Need, & Treatment

Variable	Use
Total N	A count of the total **number** of individuals entered on the *Risk, Need, & Tx* data entry sheet. May not reflect the number of individuals in the subsequent graphics. Graphics will differ based on data entry completeness or relevance.
% High Risk	Total number of participants noted as high or moderate risk at program entry divided by the total number of participants with complete risk information (does not include missing).
% High Need	Total number of participants noted as high or moderate need at program entry divided by the total number of participants with complete need information (does not include missing).

Variable	Use
Risk and Need Level	Participants are divided into the following four quadrants based on their assessed risk and need level at entry: ▶ High Risk, High Need ▶ High Risk, Low Need ▶ Low Risk, High Need ▶ Low Risk, Low Need High is inclusive of both high and moderate. Percentages should add up to 100%
Substance Use	Total number of participants ever indicated as using the specific substance divided by the total number of participants entered on the *Risk, Need, & Tx* data entry sheet. A participant may use more than one substance at a time, so percentages can add up to greater than 100%.
MH Diagnosis	Total number of participants ever indicated as having the specific mental health diagnosis divided by the total number of participants entered on the *Risk, Need, & Tx* data entry sheet. A participant may have more than one mental health diagnosis, so percentages can add up to greater than 100%.
Successful Overall Treatment Completion Rate	The number of participants who are indicated as successfully completing treatment divided by all participants who have the overall treatment completion status field completed (does not include missing). Other is classified as unsuccessful overall treatment.

PARTICIPANT OUTCOMES DASHBOARD (AKA DB OUTCOMES)

The *Participant Outcomes Dashboard* data visuals include graduation rate, average months in program, termination reason, risk and need at program exit, change in social indicators from entry to exit (including housing, high school attainment, employment, and income), in-program arrest information, and post-program arrest information.



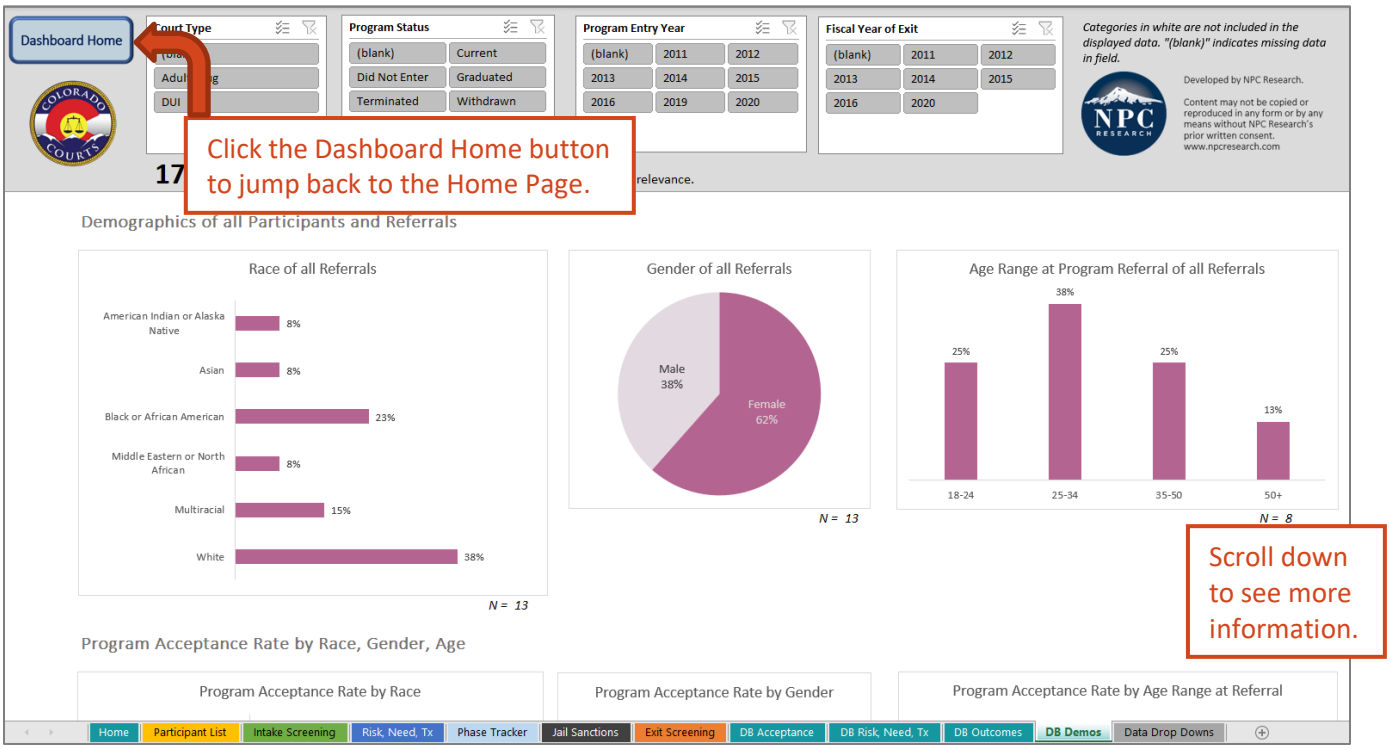
Definitions of Key Dashboard Elements: Participant Outcomes

Variable	Use
Total N	A count of the total **number** of individuals entered on the *Exit Screening* data entry sheet. May not reflect the number of individuals in the subsequent graphics. Graphics will differ based on data entry completeness or relevance.
Graduation Rate	Total number of graduates of the program divided by the total number of participants who were either successful (i.e., graduated) or not successful in the program (i.e., terminated or withdrawn). Does not include those missing a graduation status or active participants.

Variable	Use
Average Months in Program	The average number of months from Program Entry to Program Exit. Does not include individuals missing a Program Entry Date or Program Exit Date.
% High Risk	Total number of participants noted as high or moderate risk at program exit divided by the total number of participants with complete risk information (does not include missing).
% High Need	Total number of participants noted as high or moderate need at program exit divided by the total number of participants with complete need information (does not include missing).
Average Months from Program Entry to In-Program Arrest	The average number of months from Program Entry to In-Program Arrest. Does not include participants missing a Program Entry Date or individuals who either did not re-offend while in the program or those missing an in-program arrest date.
Average Months from Program Exit to Post-Program Arrest	The average number of months from Program Exit to Post-Program Arrest. Does not include participants missing a Program Exit Date or those missing a post-program arrest date.

DEMOGRAPHICS DASHBOARD (AKA DB DEMOS)

The *Demographics Dashboard* data visuals highlight comparisons of various benchmarks by race, gender, and age. These benchmarks include program referral, program acceptance, successful overall treatment completion, graduation rate, jail used as a sanction, average months in program, in-program arrest, and post-program arrest.



Definitions of Key Dashboard Elements: Demographics

Variable	Use
Total N	A count of the total **number** of individuals entered on the *Participant & Referral List* data entry sheet. May not reflect the number of individuals in the subsequent graphics. Graphics will differ based on data entry completeness or relevance. This is broken down by Race, Gender, and Age.
Race	Reflects a participant's race. If a participant indicates they are Hispanic or Latinx, race reflects their ethnicity rather than their race, regardless of what race they specified.

Variable	Use
Program Acceptance Rate	Total number of participants accepted into the program divided by the number of individuals either accepted or not accepted to the program. Does not include those whose Program Acceptance is indicated as Other or those with missing information. This is broken down by Race, Gender, and Age.
Successful Overall Treatment Completion Rate	The number of participants who are indicated as successfully completing treatment divided by all participants who have complete treatment information (does not include missing). Other is classified as unsuccessful overall treatment completion. This is broken down by Race, Gender, and Age.
Graduation Rate	Total number of graduates of the program divided by the total number of participants who were either successful (i.e., graduated) or not successful in the program (i.e., terminated or withdrawn). Does not include those missing a graduation status or active participants. This is broken down by Race, Gender, and Age.
Jail Used as a Sanction	Total number of participants marked as receiving a jail sanction at some point in the program (from the Exit Screening data entry sheet), divided by the total number of participants with complete sanction information (does not include missing). This is broken down by Race, Gender, and Age.
Average Months in Program	The average number of months from Program Entry to Program Exit. Does not include individuals missing a Program Entry Date or Program Exit Date. This is broken down by Race, Gender, and Age.
In-Program Arrest Rate	Total number of participants who were arrested in the program divided by the total number of participants with complete in-program arrest information (does not include missing). This is broken down by Race, Gender, and Age.
Post-Program Arrest Rate	Total number of participants who were arrested after leaving the program divided by the total number of participants with complete post-program arrest information (does not include missing). This is broken down by Race, Gender, and Age.

TROUBLE SHOOTING

Below are some frequently asked questions about the Excel Dashboard. It is important to understand that Excel can get tired too! If the following suggestions do not fix your issue, try saving your work, quitting Excel, and reloading the Excel Dashboard. If the issue is persistent, please contact NPC Research for any further technical assistance.

FREQUENTLY ASKED QUESTIONS

I accidently deleted a column, changed a column name, deleted a sheet, or renamed a sheet. What should I do?

If possible, immediately **undo (Ctrl + Z)** the change. If not possible, **quit out of the document and do not save**. If these changes have already been saved, please contact NPC Research to fix the error.

Why does my Dashboard take so long to upload, refresh, or filter?

The dashboard is a very large document. It can take up to a minute to upload, refresh, or filter the dashboard due to the number of formulas, tables, and graphics.

Why can I not see the drop-down arrow?

Particularly for entering the unique ID (Participant), make sure you have scrolled completely to the left so that column A (usually Participant) is the first column. The drop-down arrow is sometimes not visible due to the freeze panes bar.

How can I share the dashboard pages with other members of my team?

See **page 34** for ways to share the dashboard while maintaining data integrity and confidentiality.

Why is some of my data missing?

Make sure you have **cleared all filters** on the data entry tables. See **page 51** on clearing filters.

Why is my Dashboard not updating with new data?

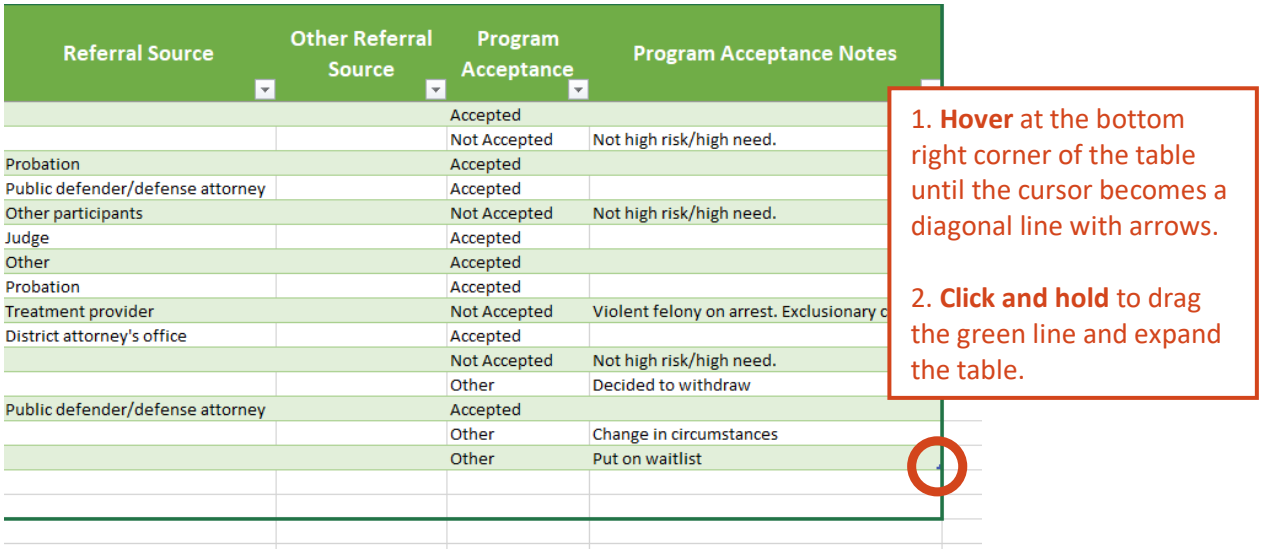
One possible solution is to make sure you have clicked **Refresh All**. See **page 31**.

Another possible solution is to make sure the data tables have "captured" the new data. See below.

How will I know the data entry tables "captured" the new data? What if the data table is not "capturing" the new data?

An easy way to tell if the table has expanded to capture the new data is to scan the sheet to see if the new rows of data mimic the colors of the data table. If they do, the table has expanded to capture the data.

If your table is not capturing new entries, scroll to the bottom right-hand corner of the entire table. Hover your mouse over the bottom right-hand corner of the table. Wait for the curser to become a diagonal line with arrows, then click (hold the click, do not release!) on the corner manually drag down the table. A thin green line will appear, showing the user the new outline of the table. Release the mouse once the new data is within the green line. The new data has now been captured.



Referral Source	Other Referral Source	Program Acceptance	Program Acceptance Notes
		Accepted	
		Not Accepted	Not high risk/high need.
Probation		Accepted	
Public defender/defense attorney		Accepted	
Other participants		Not Accepted	Not high risk/high need.
Judge		Accepted	
Other		Accepted	
Probation		Accepted	
Treatment provider		Not Accepted	Violent felony on arrest. Exclusionary c
District attorney's office		Accepted	
		Not Accepted	Not high risk/high need.
		Other	Decided to withdraw
Public defender/defense attorney		Accepted	
		Other	Change in circumstances
		Other	Put on waitlist

Can I change the drop-down lists to be more relevant?

Most drop-down lists cannot be changed due to data integrity and underlying functions powering the dashboard sheets. However, there are a few drop-down lists that can be updated. This includes: Court Name, Program Track, Need Assessment, and Risk Assessment. To change these options, click on the **Data Drop Downs** sheet.

1. **To add an option:** Select below the table you wish to add an option to. Type the new option in the cell below it and click enter. The table should "capture" this new field. If not, drag the table down as shown above.

2. **To remove an option:** Unless necessary, **do not write over current drop-down options.** It is best to just add a new option. However, if you need to, delete the option(s) to wish to remove. If some options are deleted in the middle of the table, Cut (Ctrl + X) and Paste (Ctrl + V) the remaining options to condense the table. Using the same technique of expanding the table, reduce the size of the table by dragging up to remove blank options.
3. **To change a current option:** Unless necessary, **do not write over current drop-down options.** It is best to just add a new option. If you need to, make sure that option has never been selected for a participant in the Excel Dashboard.

   If you remove a data validation option or change a data validation list, some entries may become "errors" because they no longer fall within the allowable values. These entries will be flagged with a small green triangle in the upper-left corner will appear.

Still have questions?

If you have a question or problem not addressed above, please reach out to Lyndsey Smith at NPC Research at **Smith@npcresearch.com**.

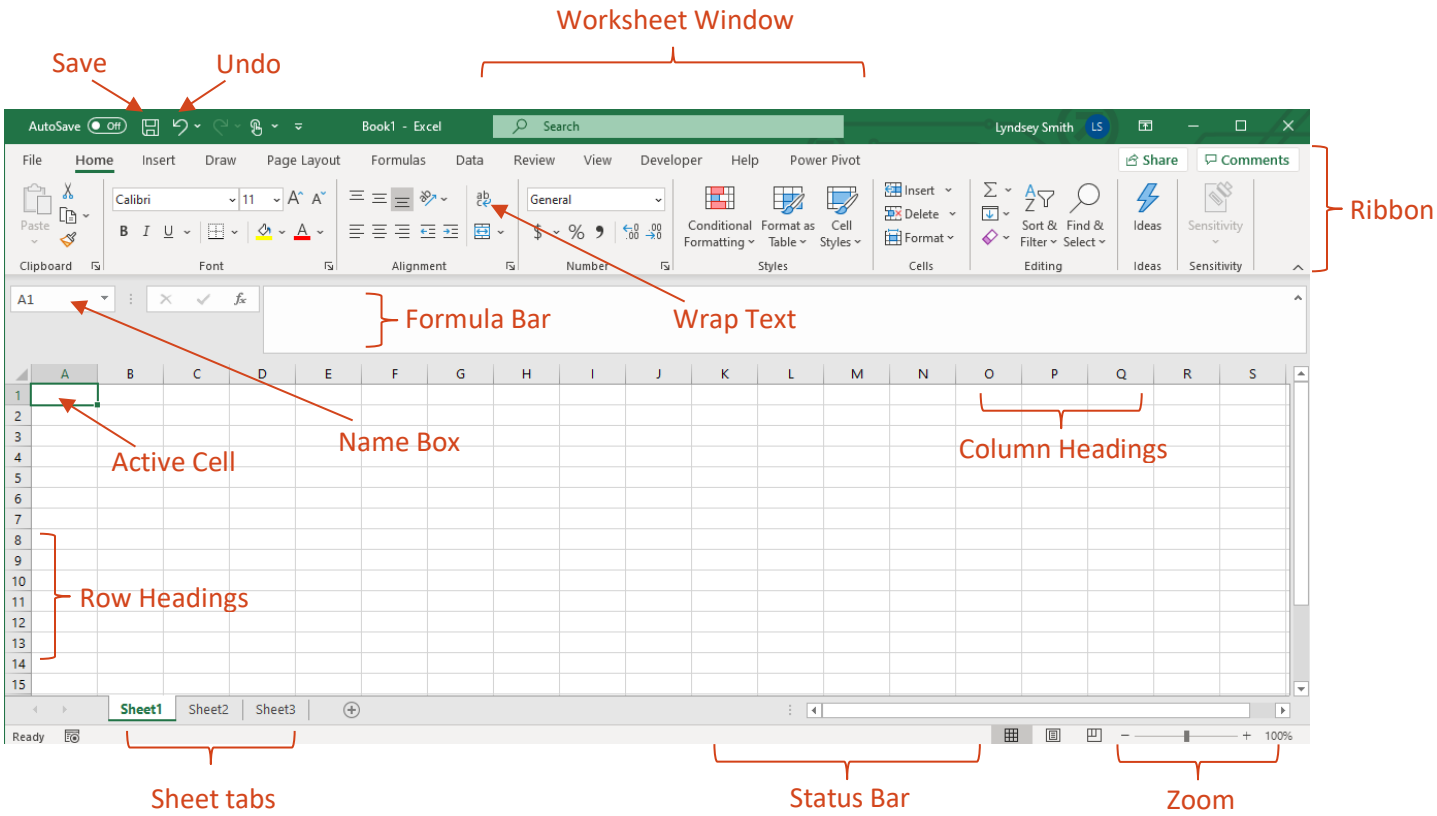
EXCEL REFERENCE

EXCEL TERMINOLOGY, TIPS, AND TRICKS

Basic Terminology

- A **workbook** refers to the whole Excel file.
- A **sheet** is contained within the workbook.
- A workbook can contain multiple sheets.

Navigating Excel



Status Bar: Highlight the data of interest and the status bar will populate with quick calculations, including the average, N count, minimum, maximum, and sum.

Wrap Text: Highlight the cell(s) and select Wrap Text to lengthen the cell for long text values.

Some Keyboard Shortcuts:

- Ctrl + X = Cut
- Ctrl + C = Copy
- **Ctrl + V** = Paste
- Ctrl + Z = Undo
- Ctrl + S = Save
- **Ctrl + F** = Search document for words, numbers, phrases, etc.
- **Ctrl + ;** = Inserts today's date
- **Ctrl + down arrow** = highlight all the data in the column below the activated cell
- **Ctrl + up arrow** = highlight all the data in the column above the activated cell
- **Ctrl + left arrow** = highlight all the data in the row to the left of the activated cell
- **Ctrl + right arrow** = highlight all the data in the row to the right of the activated cell
- **Ctrl + Shift + End** = highlight all the data from the activated cell to the bottom right-hand cell. Start in cell A1 to highlight the entire table
- **Ctrl + PageUp or PageDown** = Shifts between sheets in the open workbook
- **Alt + down arrow** = initiates the drop-down list

FILTER A TABLE

A tool to better use your data is filtering your table. This allows you to focus on areas of interest and temporarily hide data that is not relevant. The three filter options — **Text Filter**, **Number Filter**, and **Date Filter** are determined by the data in the column.

In the bottom right-hand corner of every column header, is the **column header arrow** (see next page).

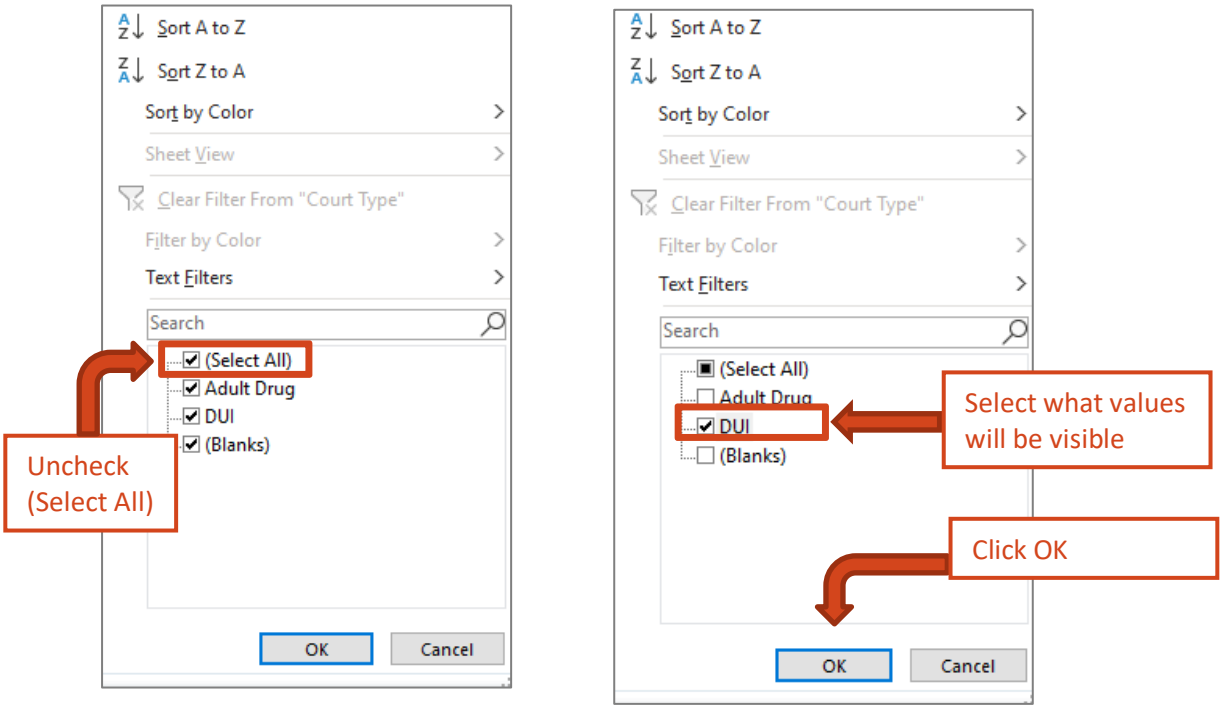
First Name	Participant Note (if same name, multiple entry)	Date of Birth	Court Type	Judicial District
Gabriel	2nd entry	4/27/1978	Adult Drug	1
Kurt		5/20/1991	Adult Drug	1
Josie		3/27/1985	Adult Drug	1
Katherine		10/13/1976	Adult Drug	1
Robert		11/7/1995	Adult Drug	1
Jasmine		2/27/1964	Adult Drug	1
Dylan		10/4/1983	Adult Drug	1
Sally		11/2/1984	DUI	1
Bread		3/31/1984	DUI	1
Merry		12/8/1980	DUI	1
Chaz		8/24/1979	DUI	1
Wiley		10/8/1960	DUI	1

Click on the **column header arrow**

Text Filter

Say, for example, you would like to limit the data visible to participants of DUI court.

1. **Select the column header arrow**.
2. **Uncheck (Select All)** and select the boxes you would like to show. Then **press OK**.



3. The column header arrow will now show a filter box.

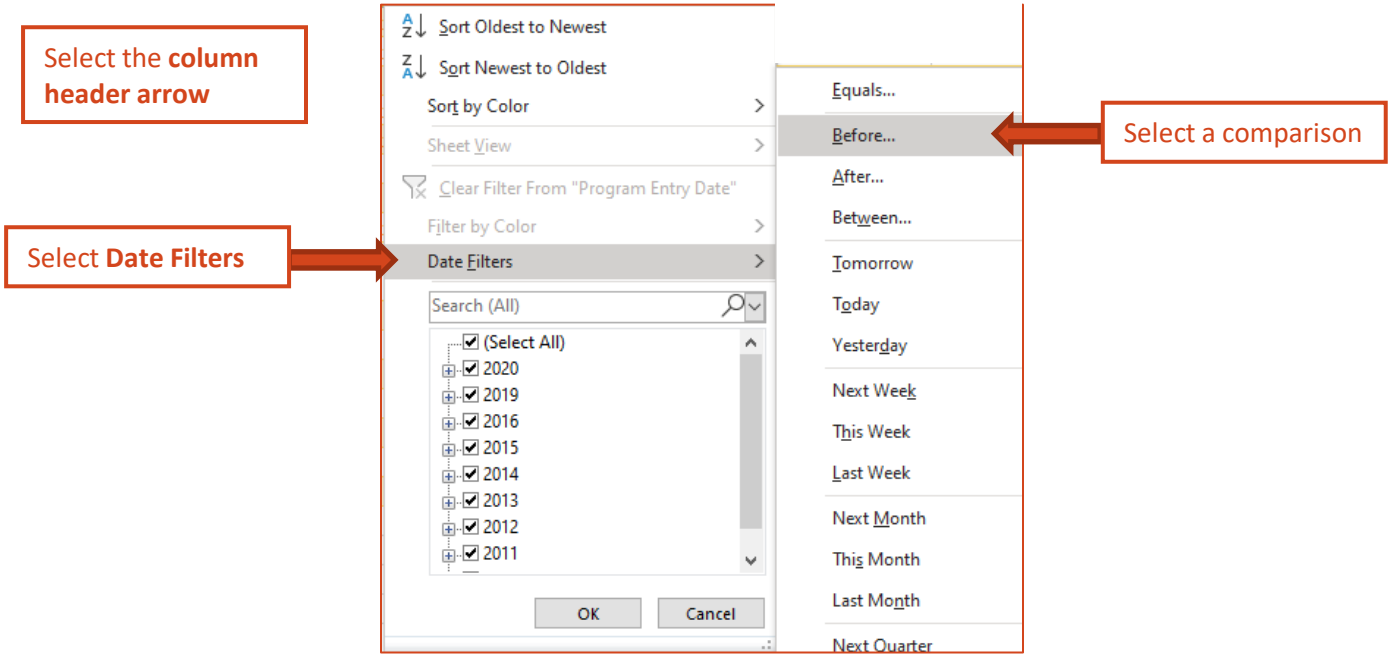
First Name	Participant Note (if same name, multiple entry)	Date of Birth	Court Type	Judicial District
Sally		11/2/1984	DUI	
Bread		3/31/1984	DUI	
Merry		12/8/1980	DUI	
Chaz		8/24/1979	DUI	1
Wiley		10/8/1960	DUI	1
Test		1/1/1980	DUI	1

A **filter box** rather than a column header arrow indicates the column is being filtered.

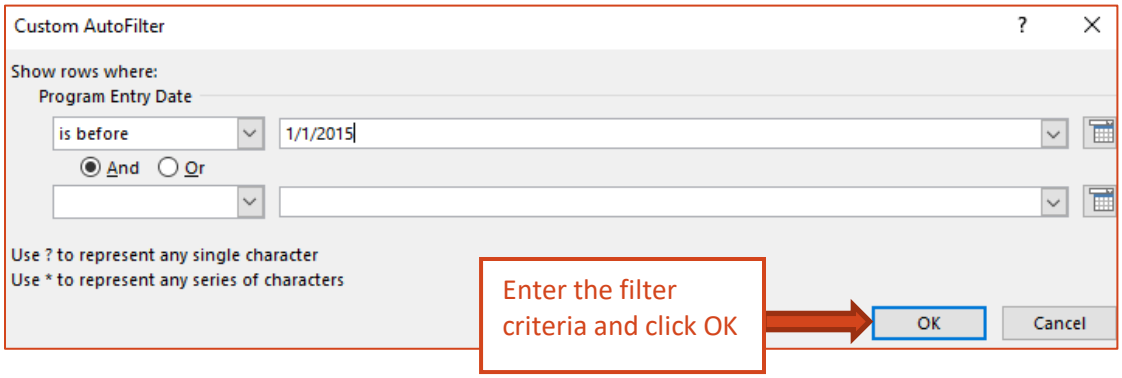
Number or Date Filters

Now say you would like to limit the visible data to participants who entered the program before 2015. There are two paths to take – one exactly like the text filter above and one slightly different. The different process is as follows:

1. **Select the column header arrow** and select Date Filters.
2. **Select a comparison** (in this case, select Before…).



3. Enter the filter criteria and **click OK.**



Multiple Filters

A table can easily be filtered by multiple criteria. Just repeat these steps in each column.

Clear Filters

Filters do not automatically turn off. Rather, they need to be manually disabled to allow all data to populate the table.

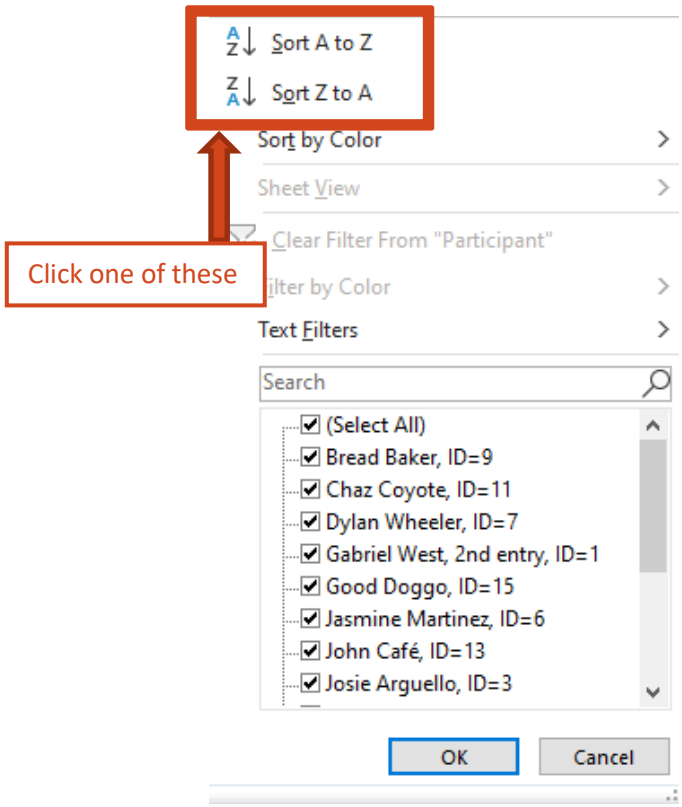
1. **Select the filter box** in the bottom right-hand corner of the column header.
2. **Click (Select All)** and press OK or select Clear Filters From *(Column Name)*.

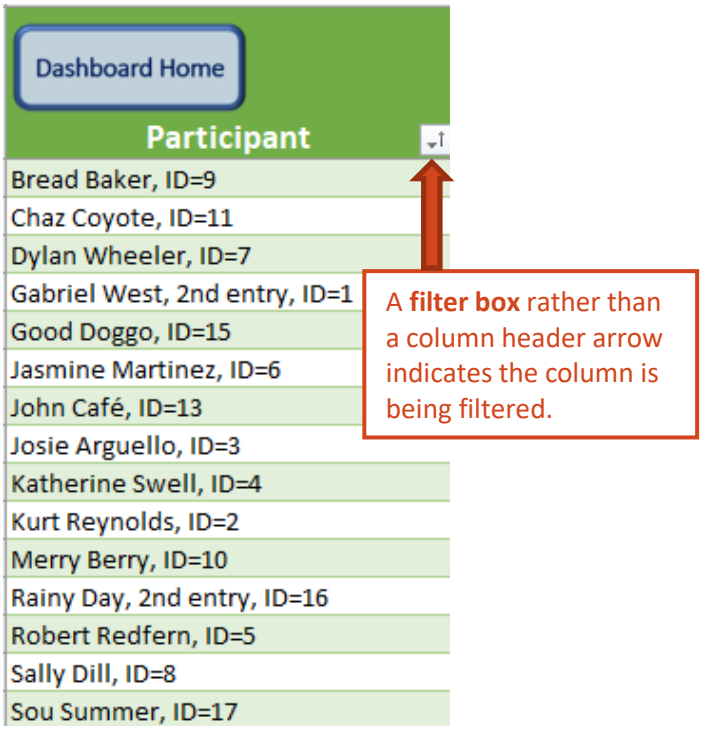
A quick check to see if some of your data is being filtered out is to scan the column headers for **filter boxes.** If there are filter boxes visible, some data is being hidden.

SORT A TABLE

Another tool to better use your data is sorting your table. This can allow for more intuitive organization or a greater ability to find a participant of interest. Unlike filtering, this will not hide any data.

1. **Select the column header arrow**.
2. Select either **Sort A to Z** (alphabetical) or **Sort Z to A** (anti-alphabetical). The column header arrow will now indicate that data is being sorted.





The sort options for date and number columns is different than the options for text columns (as shown above). Date columns can **Sort Oldest to Newest** and **Sort Newest to Oldest** while number columns can **Sort Smallest to Largest** and **Sort Largest to Smallest**.