Weekly Tracking Sheet Overview

Within each agency's Dropbox folder, an excel document is generated every Monday that tracks each client's GPRA survey information and when follow-up surveys are due. Please review this document for an overview of this excel tracking sheet.

Tracking Sheet Basics

What? Each agency receives weekly tracking sheets with client GPRA survey information. This document is intended to support tracking client IDs, GPRA interview dates, and follow-up GPRA timelines. The document is an excel file.

When? A new tracking sheet is created every Monday. Each file will have the date it was uploaded at the end of the file name, as well as within the document. Every tracking sheet includes data from the previous week. In an effort to de-clutter Dropbox folders, tracking sheets are deleted every three months (e.g., January tracking sheets are deleted in April, February tracking sheets are deleted in May).

Where? Tracking sheets are placed in agency's Dropbox folders. If you need support accessing or troubleshooting an issue with your agency's Dropbox folder, please review this resource on the Dropbox support page of the SOR website and/or contact SORSupport@omni.org for assistance.

How? Tracking sheets can be viewed in a browser when opened from Dropbox's browser or they can be opened and edited in Excel by opening the document in Excel.

Need help? Should you have any issues, please contact the VA SOR Grant Support Team at SORSupport@omni.org.

Tracking Document Contents

This section outlines the information provided in the Weekly Tracking Sheet. Below is an example of what the Weekly Tracking Sheet looks like.

Site Name: CSB			Number of clients with open windows: 2							
Sheet Updated: May 1, 2023			Number of clients with windows closing in next two weeks: 2							
SOR 3 Year 1 Intakes Completed To-Date: 30										
SOR 3 Year 1 Intake Target: 50										
SOR 3 Year 1 Months Remaining: 5										

GPRA ID	Justice-Involved	Intake Interview Date	6m - Open Date	6m - Close Date	6m - Status	Follow-up Interview Date	Follow-up Type	Discharge - Completed	Discharge Interview Date	Discharge Type	Notes
10001		10/22/22	03/22/23	06/22/23	Completed	04/19/23	Interview	No			
10002		12/01/22	05/01/23	08/01/23	Closed			Yes	07/01/23	Interview	
10003		12/14/22	05/14/23	08/14/23	Completed	06/12/23	Interview	Yes	08/30/23	Administrative	
10004			06/15/23	09/15/23	Completed	07/29/23	Adminisrative	No			
10005		02/06/23	07/06/23	10/06/23	Closing Soon			No			
10006		03/19/23	08/19/23	11/19/23	Open			No			
10007		04/08/23	09/28/23	12/28/23	Upcoming			No			

The variables in the tracking sheet mean:

Top Portion
- **Site Name:** Agency name.
- **Sheet Updated:** The day the excel file was made. This will include GPRAs submitted up to the Friday prior (e.g., a tracking sheet created on Monday, 11/7 would include GPRAs submitted up to Friday, 11/4).
- **Number of clients with open windows:** The number of clients with "Open" follow-up windows. These are clients that you should be attempting to contact for their respective follow-up interview.
- **Number of clients with windows closing in next two weeks:** The number of clients whose follow-up windows will close in the next two weeks. These are clients that you should be interviewing before their windows close in two weeks. If you haven't yet, try alternative methods to contact these clients. For more information and tips and tricks, see our GPRA Administration Tips and Best Practices. If you are unable to complete an interview follow-up GPRA with these clients prior to their window closing, please complete an administrative follow-up GPRA.

Intake GPRA Section
- **GPRA ID:** The agency generated ID number used on the Intake GPRA. This ID will be attached to all GPRA timepoints.
- **Justice-Involved:** "Yes" indicates whether the client is in a justice system setting. The field will remain blank if the client is not in a justice system setting.
- **Intake Interview Date:** Interview date provided on the intake GPRA.

Follow Up GPRA Section

- **6m-Open Date:** Date the client is first eligible to complete the 6-Month Follow-Up GPRA interview (5 months after the intake date)
- **6m-Close Date:** Final date on which the client is eligible to complete the 6-Month Follow-Up GPRA interview (3 months after the open date). If the interview is completed after this date, the GPRA will not count toward the statewide follow-up rate.

- **6m-Status:** Indicates the client's follow-up GPRA status. There are 5 options:
    - **Upcoming**: the follow-up window is not yet open, and it is too soon to administer a follow-up GPRA.
    - **Open**: No follow-up GPRA has been completed and the follow-up window is open. This is highlighted in green.
    - **Closing soon**: no follow-up GPRA has been completed and the follow-up window will close within the next two weeks. This is highlighted in red.
    - **Completed**: the follow-up GPRA has been completed.
    - **Closed**: the follow-up window has closed, and it is too late to administer a Follow-up GPRA
- **Follow-Up Interview Date:** Interview date provided on the follow-up GPRA.
- **Follow-Up Type:** Indicates whether the submitted follow-up GPRA was an "interview" or an "administrative" GPRA.

Discharge GPRA Section

- **Discharge – Completed:** "Yes" indicates a discharge GPRA has been submitted and "No" indicates a discharge GPRA has not been submitted.
- **Discharge Interview Date:** Interview date provided on the discharge GPRA.
- **Discharge Type:** Indicates whether the submitted discharge GPRA was an "interview" or an "administrative" GPRA.

- **Notes:** Miscellaneous notes to indicate a deceased client and a potential duplicate GPRA. Agency staff are also welcome to input any miscellaneous notes in this column (with the knowledge that a new tracking sheet is created every week).
    - **Deceased client:** If a client is deceased, a note indicating this will appear here.
    - **Duplicate client:** If your agency enters more than one intake, follow-up, or discharge survey for a single client, OMNI typically proceeds with using the first survey received (for each survey type). In some cases with follow-up or discharge surveys, OMNI may prioritize interviewed surveys or surveys that were administered within a client's follow-up window instead of the survey first received. In all cases where OMNI has taken an action due to duplicate surveys received, OMNI will flag the affected record accordingly in your agency's tracking sheet with a note explaining the action OMNI took. In the case that your agency would like OMNI to use a duplicate survey that differs from OMNI's selection indicated in the tracking sheet notes, please send an encrypted email to SORSupport@omni.org explaining which survey you would like to use instead.