Making Excel Work for Your Tribal Community

Building Your Intake Spreadsheet

Capacity Building
CENTER FOR TRIBES

Your intake spreadsheet can hold as little or as much data as you are interested in collecting. When thinking about what your agency does, you can start to build columns in the spreadsheet to collect that data, like child information, important dates, and investigation results. Data collection should always reflect your practice, never the other way around!
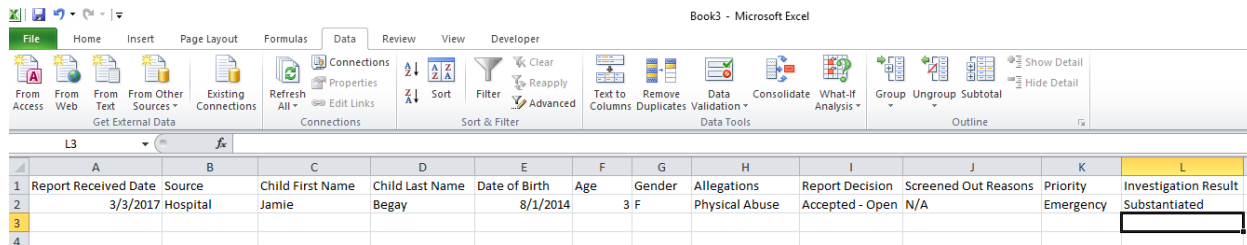
Developing Columns

Let's start with child abuse/neglect reports. Typically, a child welfare case begins when a report comes in on a family. So a column on the spreadsheet could be "Report Received Date." If you are interested in collecting information on how the report came in, you could create a column for "Source." The alleged victim's first and last name should be two columns, and you should also have a column for the child's gender and the type(s) of alleged abuse/neglect reported (e.g., Physical Abuse).

Notice that we have a column for both "Date of Birth" and "Age" so the worker can see at a glance how old the child is. Other columns you may want to include are "Report Decision" (was the report accepted or screened out?) and for reports that are screened out, a column for "Screened Out Reasons." Another column such as assigned caseworker and date assigned could be helpful for tracking staffing issues. Often cases aren't followed up on as quickly as they should be and if you track the date assigned, it's a helpful piece of info.

Once the report is accepted, it is assigned to a worker to investigate. The worker will need to know what "Priority" the report is given to direct what the response time should be to visit the alleged victim.   The result of the investigation should be documented in a column. The terms "Unsubstantiated" and "Substantiated" are often used to describe the result of an investigation – this is a great opportunity to make a drop-down list.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Report Received Date	Source	Child First Name	Child Last Name	Date of Birth	Age	Gender	Allegations	Report Decision	Screened Out Reasons	Priority	Investigation Result
2	3/3/2017	Hospital	Jamie	Begay	8/1/2014	3	F	Physical Abuse	Accepted - Open	N/A	Emergency	Substantiated
3												
4												

What happens after the investigation is found substantiated or confirmed? Was the child removed from the home and placed with a foster parent or relative? Or was a safety plan put in place and the child is able to remain in the home? The answers to these questions should be documented in your spreadsheet.

To continue your spreadsheet, keep thinking about the sequence of activities and processes that you do in your job to identify what data you need to collect. For example, when a child is removed from the home, you most likely would want to know what date the child is removed, where the child is placed, and what kind of placement it is, like foster home (relative or non-relative), shelter or group home.

When setting up your spreadsheet, include data that you want to collect for:
- Federal or State Reporting
- Grant Reporting and Evaluation
- Future Funding Opportunities
- Program Management

Additional information you may want to collect:
- Family's home address (for GIS mapping analysis, if your Tribe has this capability)
- Worker assigned to case
- Date and time of initial contact with child
- Family names of father and mother (maiden name)
- Additional substance abuse or mental health information
- Cultural/Spiritual information specific to your community

Organizing by Month or Quarter

Depending on how many families and children your agency works with in any given month, you will want to organize your data into months or quarters, while still keeping at least a full year of data in the same file. This will make your routine reporting easier to manage.

Add and name a new tab for each month of the year. You may want to start with January or October, depending on whether you are organizing by the calendar year or the federal fiscal year. Once you have all

your columns in the spreadsheet labeled, you can copy the column headers to the other worksheets and start collecting data!

*For help with adding and renaming worksheets, you can visit the **Basic and Intermediate Excel Skills Refreshers** in this learning series. You can also find helpful design tips like freezing header rows, widening columns, wrapping text, and changing the font to make your spreadsheet more attractive and easy to read.*

Reporting Sheet

One of the benefits of having your data in a spreadsheet is that you can have all the counts for reporting and other uses readily available in the same file. You can update the numbers by hand – or better, you can add formulas to automatically update your counts as data is entered into another tab. However you compile these numbers, you'll want to set up a separate worksheet for them.

In this learning series, we'll be using the BIA Quarterly and Annual Report Part B as our example for reporting counts. To set up these reporting numbers, you'll add several columns and rows to the blank worksheet:

- The time periods (months, quarters, and year-to-date) will go in the column headings
- The BIA reporting categories will go in the rows of the left-hand column.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	FFY 2017	Oct	Nov	Dec	Q1 Total	Jan	Feb	Mar	Q2 Total	Apr	May	Jun	Q3 Total	Jul	Aug	Sep	Q4 Total	Year-to-Date
2	BIA Quarterly and Annual Report - Part B Tribal Child Abuse and Neglect Data																	
3	Total Reports/Referrals Received																	
4	Substantiated																	
5	Unsubstantiated																	
6	Sexual Abuse																	
7	Physical Abuse																	
8	Neglect																	
9	Alcohol Involved																	
10	Drugs and/or Inhalants																	
11	Recurring Cases																	
12	Cases of Siblings Involved																	
13	Placement Out of Home																	
14	Petition to Tribal Court																	
15	Referral to Tribal Social Services																	
16	Domestic Violence Involved																	

You can format the font and use color to make the spreadsheet easier to read. You can also add sections for other reporting you do or other kinds of information you're interested in looking at.

Next Steps

Now that you have your spreadsheet set up, you can enhance it with drop-down lists and formulas to make it more efficient and useful. Check out the rest of the *Making Excel Work for Your Tribal Community* learning series to keep learning about enhancing your data collection and what you can do with your data beyond reporting.

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