**Appendix 4: MIS Guidance Document Workbook**

| Bureau of Substance Abuse Services |
| Massachusetts Department of Public Health |

**Type of project:** In the white space below, specify whether you are reporting on a MOAPC or UAD project:

| Your community: | In the white space below, provide the name of your community (and cluster communities, if applicable): |

**Instructions:** This EXCEL workbook includes data entry sheets and summary sheets for each of the four quarters of FY 2015, plus summary sheets for the whole fiscal year. The purpose of the workbook is to facilitate detailed tracking of project activities and people served during each three-month quarter and the year as a whole. (blank MIS form can be found here: http://masstapp.edc.org/tools-and-worksheets)

The first step in use of the workbook is to complete the "Activities" sheet, which follows this sheet. This is done by listing all of the activities/strategies to be carried out during the project year. In doing so, note that this is the only place where activities/strategies can be listed in the workbook. In addition, while additional activities/strategies can be added later in the project year, please do not remove any activities/strategies from the list, even if no additional activities of that type are provided during some months of the year.

Then, for each Quarter, the workbook includes nine sheets and is intended to facilitate tracking of project activities and people served during a three-month quarter of the project year. The first six sheets are for recording your project data by month, with two sheets for each month: (1) a sheet to record activities provided during the month, and (2) a second sheet to record demographic characteristics of people served during the month.

The monthly sheets are filled out by populating the **pink and light blue background cells** in the appropriate sheet for each of the three months in a quarter, first filling in each activity carried out and the estimated and direct numbers of people reached with each activity in the first sheet and then filling in the blue background cells in the second table to provide the demographic breakouts for those people where that data is available. Please note the additional instructions in the yellow background cells of the demographic summary sheet for each month.

**So please remember:** You fill out only the **pink and light blue background cells**. All the other non-blue and non-pink background cells contain labels, instructions, cell references, and/or formulas that provide various sub-totals and totals for your own use or to forward figures from the current month to quarterly or year-long summaries so that they can be combined automatically in cumulative summary statistics.
For each Quarter, the last three sheets are summary tables that automatically provide quarterly summary statistics as the monthly tracking sheets are completed. **You do not fill out these sheets.** The seventh and eighth sheets of the workbook provide detailed cumulative summary statistics for project activities and demographics of people served during the quarter, and the ninth and last sheet is structured the same way as the MIS reporting form currently used by BSAS. All three of these final sheets are populated automatically by completing the blue background sections of the monthly tracking sheets.

Finally, the last three sheets of the workbook are summary tables for the year as a whole that provide statistics for the project year as a whole as the monthly tracking sheets are completed. **Again, you do not fill out these sheets.** The first two year-long summary sheets provide summary statistics for project activities and demographics of people served during the year. The final sheet is structured the same way as the “Year to Date” sheet of the MIS reporting form used by BSAS. As with the quarterly summaries, these year-long summary sheets are populated automatically by completing the blue background sections of the monthly tracking sheets.

EXCEL tips:
1. The blue cells have been set to accept only whole numbers and will reject text or other types of data. This was done to prevent accidental inclusion of data that cannot be processed by the formulas. The pink cells are set to accept text responses.

2. Sheets have been formatted to show as much of each table as possible, leaving columns somewhat narrow. As a result, very large numbers (over 100,000) may show as ####### in some cells. The numbers become visible by running the cursor over these cells. Of course, the columns also can be widened to make the numbers visible.