

How To Use Tableau for Your Data

What is Tableau?

Mental Health America (MHA) is now using a software called Tableau for our monthly affiliate data reports. Tableau is a data visualization software that will allow you to access your data at any time, search date ranges so you can see more than just a month at a time and visualize the data graphically rather than just in table form.

How Do I Access My Data in Tableau?

On a monthly or quarterly basis, Maddy Reinert will send you your unique Tableau file. To open it, you must download an application called Tableau Reader. Go to this link:

<https://www.tableau.com/products/reader> and click “Download Reader.”

Once you have Reader, open your unique Tableau file. This file contains all your screening data (both Custom URL and state-level or zip code data, if requested) from 2015 through 2020. You will now see all the demographics that we normally send in your report in graphs and other visualizations.

Every month or quarter (whichever you prefer), I will upload the new data into your dashboard and re-send you the file. This file will still contain all your old data, so you can just save it in place of the old Tableau file you have.

The new data will be added to your entire dashboard, and the date filter on the first two tabs will reflect the new date range of the data. If you would only like to view the previous month, simply change the date range by moving the slider or typing in the dates you would like to view (see section on How to Use Your Tableau Dashboard for more information).

How Do I Use Tableau Once I Have My Unique File?

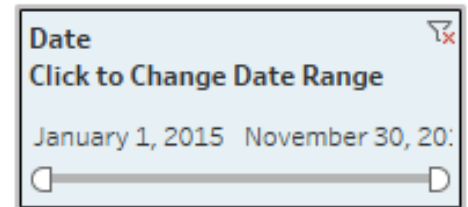
Important Terminology

- **What is a Dashboard?**
 - Once you open the file we emailed, you will see what is called a Dashboard. The dashboard is the visual representation of your screening data and is named after the updated file you will receive each reporting period. At the bottom of your dashboard, there are tabs that represent the various demographics we collect during screening (e.g. Screen Results, Gender and Age, Race/Ethnicity and Household Income).
- **What is a Visualization?**
 - Each of the graphs or tables throughout the dashboard are called “visualizations.”

Filters Applied to the Whole Dashboard

If you click on the first dashboard, titled “Screens,” or the second dashboard, titled “Screen Results,” you will see a table and a graph reflecting the screens that we have collected for you. On the right side of the table and graph, you will see two filters.

- **Date:** We have uploaded all the data we have collected for your affiliate, so this filter ranges from 2015 to 2020. You can either move the sliding bar to choose a different date range, or you can click on the date to type in a new one. This allows you to generate a report for any date range you choose, whether you want to view the report just from the last month, the last year, etc.



- **NOTE:** This filter also applies to all visualizations in the other tabs. As you choose a date range, the visualizations will change to reflect only the data from the dates you have chosen. To reset this, go back to the date filter and select new dates.

- **Referrer:** The check boxes below represent the source of your data. If you select “All”, you will view the data for both your Custom URL and zip codes/state level data, based on what you have requested. To just view your Custom URL data, uncheck all and select Custom URL. This filter applies to all the demographic tabs you see, so the visualizations in each tab will change to reflect what you select as this filter.

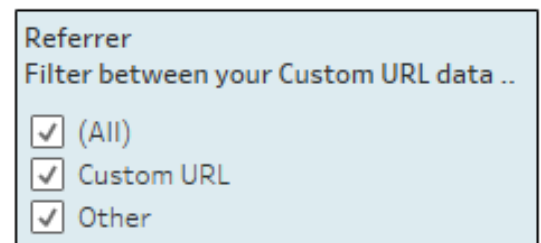


Chart Details

You can hover over the graphs to get more information. For example, if you hover over any parts of a chart, you can see more information, including the counts, and percent of totals.

Charts in Each Tab


This section only applies to the tabs: “Gender and Age”, and “Race/Ethnicity and Household Income.”

You can click on certain charts to filter data in the other chart in the tab.

- On the third tab with the gender and age charts, when you click on the “Female” section of the pie chart, the age graph will change to show you the age distribution of just the female screeners. To reset the chart so you see the age breakdown of all genders again, simply click just outside the gender pie chart.
 - You can also do this the other way around: if you click one of the bars under age, the gender graph will change to show the gender breakdown of just that age

group. The age graph can be reset the same way as the gender pie chart (just click in the vicinity of the graph).

- You can also click to filter on the next tab, with race/ethnicity and household income. If you click on one of the bars for race/ethnicity, the household income graph will reset to reflect the income distribution of screeners of that race/ethnicity, and vice versa.
 - These filters will only apply to that dashboard. For example, if you select Asian or Pacific Islander, only the household income graph will change to reflect the breakdown of that group of screeners, not any of the visualizations under the other tabs.

If you want to turn these filters off: Click on the visualization. In the top right corner, you will see this symbol . Clicking this will undo the filter functionality. You can reset it any time by clicking that symbol again.

NOTE: Filtering by diagnosis and health insurance does not work because the questions “Have you ever been diagnosed with a mental health condition?” and “Do you currently have health insurance?” were introduced to the screens at different times, and therefore there is very little overlap between this data.

Similarly, on the next tab, the question “Are you currently receiving treatment/support?” only appears if someone answers “Yes” to the question “Have you ever received treatment/support for a mental health problem?” when someone is taking the screen, so these graphs are naturally filtered.

Undo/Redo

As you are using your dashboard, you may want to undo something you have changed. On the toolbar at the top, you will also see two arrows. The arrow pointing left is the “Undo” button, which can be useful if you would like to undo a certain filter you have set.



Can I Download and Use These Graphs?

Yes! If you would like to use any of these graphs for your own purposes (reports, presentations, on your website, etc.) you can click “Dashboard” on the toolbar at the top, and then either select “Copy Image” or “Export Image.”

This will either copy or export a screenshot of the tab you are currently viewing.

Why Are Some Tabs Blank as I Change the Date Range?

If you have been using MHA Screening since we started, your dashboard contains data collected since 2015. Over the years, we have made some changes in the questions we ask. As you change the date range, you may notice some questions no longer contain data, or some answers may be missing.

Below are the changes we have made over time:

- In May 2015:
 - We removed the option “Take another screen immediately” from the question, “What next steps do you plan to take after screening?”
 - We added the Alcohol or Substance Use, Parent, and Youth screens.
- In August 2015:
 - We added the Psychosis screen.
- In March 2017:
 - We added the Eating Disorder screen.
- In February 2018:
 - We added the questions: “Have you ever received treatment/support?”, “Do you currently receive treatment/support?”, and “Do you currently have health insurance?”
 - We added “Trauma Survivor” as an option to select under the question, “Which of the following populations describes you? Check all that apply.”
- In March 2018:
 - We removed the question, “Have you ever been diagnosed with a mental health condition by a provider?”
- In April 2018:
 - We added “Cancer” as an option to select under “Do you have any of the following general health conditions?”
- In September 2018:
 - We added “Movement Disorders” as an option to select under the question, “Do you have any of the following general health conditions? Check all that apply.”
 - We removed the questions: “What next steps do you plan to take after screening?” and “How can MHA help you? Check all that apply.”
 - We added the questions: “How can MHA help you?” specifically if screeners selected that they were Caregivers or if they reported that they were currently receiving treatment (both which can be found under the tab “MHA Help Special Categories”).