COLORADO PREVENTION SYSTEM

CO KIT EVALUATION TA

Family Resource Center Association

March 2007

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ABOUT THIS MANUAL

This manual contains a brief introduction to the CO KIT system. It then discusses the specific modules and screens that Family Resource Centers (FRCs) will use. Lastly, the OMNI support module is explained, through which providers can access technical assistance and the full CO KIT User Manual.

INTRODUCTION TO CO KIT

Colorado KIT (Knowledge-Based Information Technology) is a web-based reporting and evaluation system that allows social service organizations to enter data about their programs, participants and service outcomes. CO KIT is comprehensive, flexible, and consistent with national standards (including, DSS, MDS, Core Measures, Risk and Protective Factors).

KIT (Knowledge-Based Information Technology) Solutions, Inc. is a software company that develops database systems for the health and human service fields. One of their products is called the "Performance Based Prevention System" (PBPS). CO KIT is an extension of this system. PBPS is currently used by seven other states: Maine, Washington, Pennsylvania, Virginia, South Carolina, Rhode Island and Florida. As of Fall 2005, California and New York also became clients. While PBPS is used by several states nationwide, Colorado's extension of it — CO KIT — is unique. At this time, Colorado is the only state to offer a common framework for reporting and evaluating prevention and intervention services for contractors across various programs and social service organizations. Currently, CO KIT is used by an array of programs and agencies throughout the state.

CO KIT SYSTEM FEATURES
CO KIT MENUS

The following table gives an overview of the menu choices in CO KIT. The yellow tabs are called "modules," while the green tabs are "screens." Fields for modules and screens that are not currently available in CO KIT have been left blank.

Planning	
Funding Source	Enter or select targeted funding.
Need Statement	Enter the reason for doing your program.
Program	Enter information related to your program. A program is a group of activities.
Outcome	Desired effects of the program in relation to your funding.
Activities	Single, Recurring, or Mentoring services describing what you intend to accomplish.
Approval	

Funder Approval	Enter a set dollar amount. Also, to check if funding is approved or not.
Implementation	
Individual Enrollment	Enter information about the participants in the various programs. You will need to assign the individual to a specific program and cohort.
Cohort	A group of clients that participate in Recurring services. Assigning the right participants to the right cohort is important to ensure the attendance is correct for your recurring services.
Recurring Activity	Enter a service that is delivered more than one time to the same set of participants.
Single Activity	Enter a service that occurs once.
Infrastructure Milestones	Update the status of population outcomes or infrastructure milestones.
Reports	
Service	
Administrative	
Client Data	
Outcomes-Individual	Allows you to input answers to pre- and post-tests for participants.
Coalition	
Coalition Organization Registration	Register an organization to provide coalition services.
Coalition Member Registration	Register a coalition member within the organization.
Meeting Groups	A group of coalition members who meet for meetings on a recurring schedule to track service performed.
Meetings	Establish and prioritize goals and objectives, and then track the progress to meeting those goals and objectives. This module is a way of centralizing the meeting agendas and tasks.
Mentoring	
Register Mentor	Register a mentor.
Mentor-Mentee Match	Assign an activity to a mentor and mentee.
Mentor-Mentee Activities	Enter a Mentor service.
Match Closure	Close a Mentor/Mentee match.
Knowledge Base	
Expert Help	

Indicators	
Library	
Web Sources	
Administration	
Organization	This area is used to set or modify information on the organization.
Staff	Register new staff or edit existing staff information.
Administrative Time	Track non-service staff time.
Change Password	Allows a user to change the password for the account s/he is currently logged in under.
OMNI Support	Opens a new browser window to the support site.
Log Off	By choosing this option, you will Exit the program and close the online session.

This screen illustrates the yellow modules menu and green screens menu described above:

Tips For Using the System Effectively

The program and data entry screens are organized in the same way an agency would typically outline a program. **First**, goals and outcomes are created, supported by the use of an outcome builder, which helps to ensure that they are clearly stated and measurable. **Next**, descriptive information about programs and services is entered, including the types, amount and duration of services. Because outcome instruments are built into the system, one or more of these is selected for the program, enabling the direct entry of pre-post data. **Finally**, participant information is added as individuals enter the program, and attendance tracking is made easy through a batch entry process. The system also contains a separate coalition module that is useful for tracking coalition membership, activities and successes.

CO KIT is set up in such a fashion that moving from left to right on the module and screen menu bars is the best approach to using the system. Start at the Planning module, filling in all the information for that area before moving on to the Implementation module. Continuing in this manner will ensure that all of the modules in the system have enough information to function correctly. If all of the different portions are not completed, some modules will not work correctly.

Recommended Computer Settings

Screen Resolution
The best screen layout for CO KIT requires PC monitor settings be set to 1024 x 768 pixels or larger. If your screen resolution is smaller (for example, 800 x 600 pixels) everything on the screen will appear larger. But, if you use 800 x 600 pixels, then you will have to scroll more both up and down, and left and right to access all the data fields. To determine your PC monitor's pixels settings (Windows XP), go to: My Computer →Control Panel→click Appearance & Themes→click the "Display" icon→click the "Settings" tab in Display Properties. "Screen resolution" information is in the lower left box.

Web Browser
The web browser supporting CO KIT is Microsoft Internet Explorer (IE). Currently, Mozilla Firefox, Netscape, AOL, MSN and other browsers are not supported. They may function, <u>but not to design specifications</u>. We recommend users have the latest version of IE installed on their computers along with the updates provided by Microsoft (which are released periodically).

Pop-Up Blockers
Modern computer security technology and usability features development have led to pop-up blocking. Although this new feature of internet browsers, toolbars and other third party managing software blocks hazardous and annoying pop-ups, the CO KIT site requires pop-ups to function. If your pop-up blocker is enabled, then there is a possibility CO KIT may not function or appear properly. You should either disable the pop-up blocker while using CO KIT (while remembering to enable it, if desired, when not in the CO KIT system), or create exceptions for the pop-up blocker. This is cumbersome, but may be easier than making exceptions to the pop-up blocker.

<u>To create exceptions for the pop-up blocker</u>:
1. Open the Internet Explorer browser window.
2. Once the browser is open, click the top toolbar option "Tools" and then go to "Internet Options."

3. After the “Internet Options” window is available, click on the “Privacy” tab at the top of the window.
4. You will notice while on the “Privacy” tab, there is a section near the bottom on “Pop-Up Blockers.”
If the “Block Pop-Ups” box is checked, then click on the “Settings” button.
You can now add CO KIT links to the “Allowed Sites” list, which the pop-up blocker will ignore when trying to block pop-ups from CO KIT.
5. You will want to add https://cokit.omni.org.

Once this site is added to your “Allowed Sites” list, the pop-up blocker will no longer prevent pages from loading or appearing while you are using CO KIT.

IMPLEMENTATION MODULE

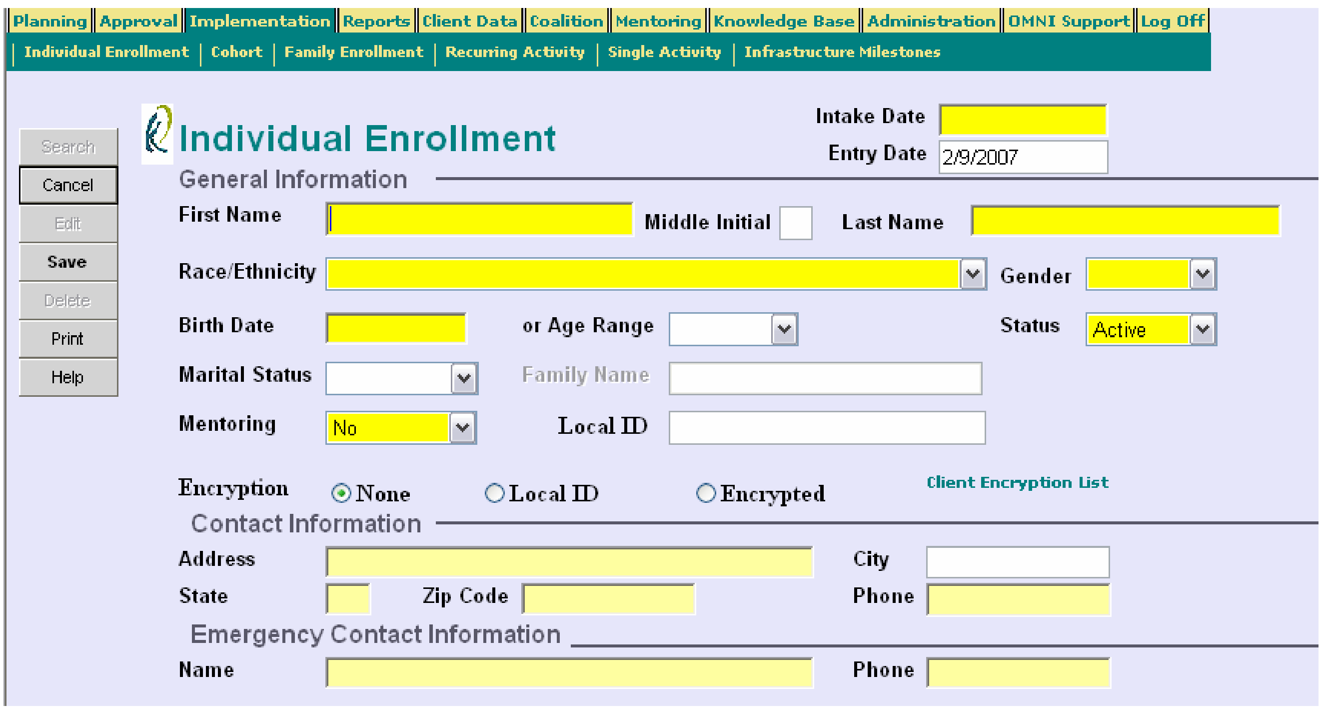
When you are ready to track the individuals enrolled in your program, or in this case, the families receiving Family Support Services, and enter their information into the CO KIT system, you'll begin with the Implementation Module. The first screen is the Individual Enrollment Screen.

INDIVIDUAL ENROLLMENT SCREEN

The Individual Enrollment screen is where you enter participant information and set up their profile within the CO KIT system.

STEPS for Adding a New Participant

1. Click the **Implementation** module, followed by the **Individual Enrollment** screen.
2. Click the gray **Add** button on the left toolbar. This opens the form for data entry (see form below). The bright yellow fields must be completed before you can move to the next screen.



3. Enter the Participant's **Intake Date** (the date the individual began the program), **First Name** and **Last Name**.
4. Click **Race/Ethnicity, Marital Status** and **Gender** from the fields' drop-down boxes. The available choices appear and you may select the appropriate option.
5. Enter the participant's **Birth Date**. *Or*, if you do not know the participant's birth date, click the down arrow for the **Age Range** field. A list of age ranges displays. Select the participant's age range and the system automatically populates the

Birth Date field with a date that corresponds with that age range. Data will be aggregated by age ranges, so exact birthdates are not mandatory.

6. Select "Active" in the **Status** field. If a participant exits your program, you may change the status to "Inactive."
7. In the **Mentoring** field's drop-down box, select "**Yes**" or "**No**" depending on whether the individual will participate in a one-on-one mentoring activity (this will be "no" for the FRCA Family Support Assessment data entry).
8. The **Encryption** section provides some flexibility in how your participants are identified in CO KIT. In the event it is necessary to internally protect the identity of your program's participants, three options are available (followed by brief explanations):

    <u>None</u>: If you want to identify your participants by their first and last names, click the **None** option. Your participants' names will always display in CO KIT.

    <u>Local ID</u>: If you want to identify your participants by a code (such as case numbers, or other alpha &/or numeric codes you use to identify your participants), click the **Local ID** option and type the corresponding code into the blank **Local ID**'s field found above the Local ID encryption option.

    > **NOTE:** *Once this screen is saved, you no longer have access to the individual's first and last names assigned to this ID. Therefore, at the time you choose this option, <u>it is essential that you to keep a separate record linking Local IDs to their corresponding participants</u>.* If you want to record the Local ID but keep the name as well, do not click the "Local ID" button. Rather, keep the "None" button selected but enter the Local ID into the blank field. Both the name and the information you enter will then be saved.

    <u>Encrypted</u>: If you want to identify your participants with a number randomly generated by CO KIT, select the **Encrypted** option.

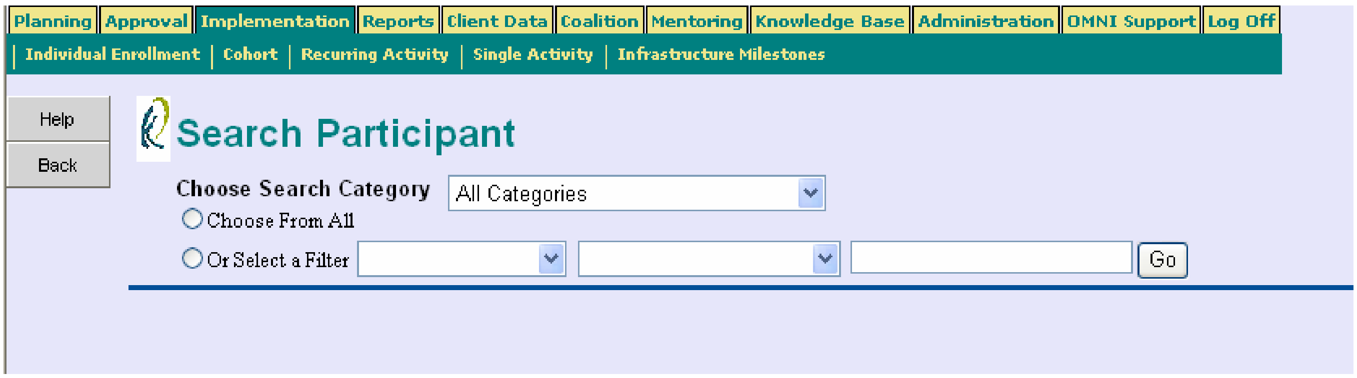
    > **NOTE:** *Once this screen is saved, you no longer have access to the individual's first and last names assigned to this ID. Therefore, at the time you choose this option, <u>it is essential that you keep a separate record linking CO KIT-created numbers to their corresponding participants</u>*.

    Remember, a participant's Display ID cannot be edited. Once you make the decision to display a participant by name, Local ID, or Encrypted number in CO KIT, this cannot be changed.

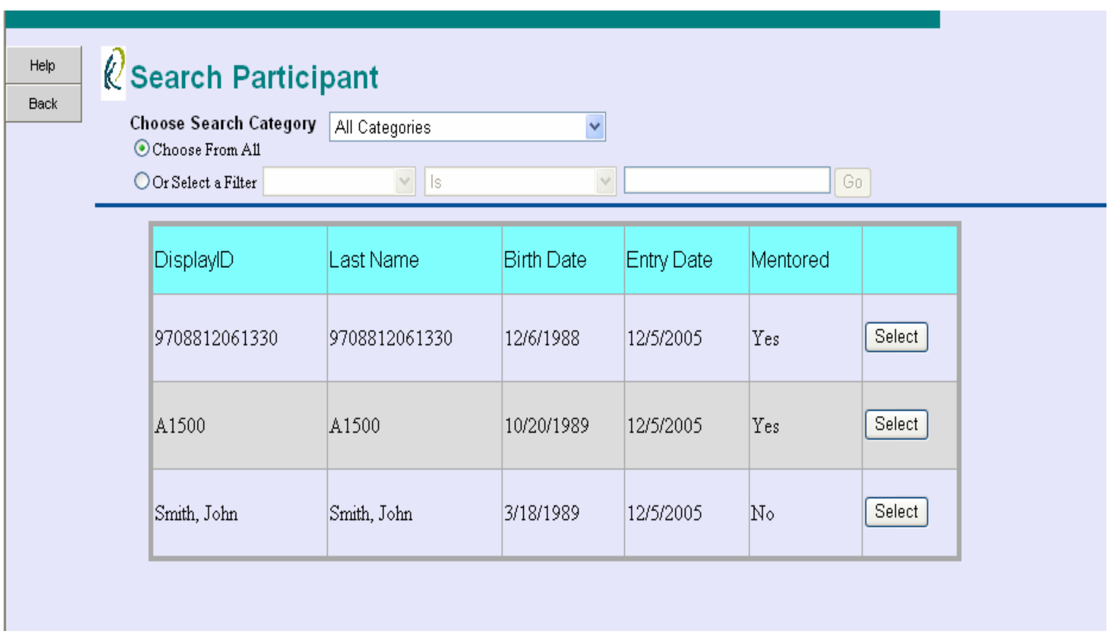
9. **Contact Information** and **Emergency Contact Information** are optional. If you wish to record this information, you may do so here. If you do not choose to record them, the system will not require you to do so.
10. After all information has been entered click the gray **Save** button on the left toolbar.

STEPS for Editing an Existing Participant

1. Click the gray **Search** button, and the following screen appears:



2. Choose either **Choose From All** or **Or Select a Filter**. If you select **Choose From All**, the names, Local IDs or encrypted numbers for every individual previously entered into the system will display on your screen. If you click **Or Select a Filter**, you can narrow your participant list to first name, last name, birth date, assigned program, mentored, or entry date.
3. Once you have selected the individuals you wish to view, the following screen appears:



4. Click the **Select** button to the right of the line for the name/ID of the individual whose record you want to edit. You will be brought back to that individual's **Individual Enrollment** screen.

5. Now, click **Edit** and the form opens, allowing you to make changes to the information originally entered.

   NOTE: As explained under **STEPS for Adding a New Participant** - # 8, you cannot edit a participant's Display ID. Once you make the decision to display a participant by name or Local ID or Encrypted number, this cannot be changed.

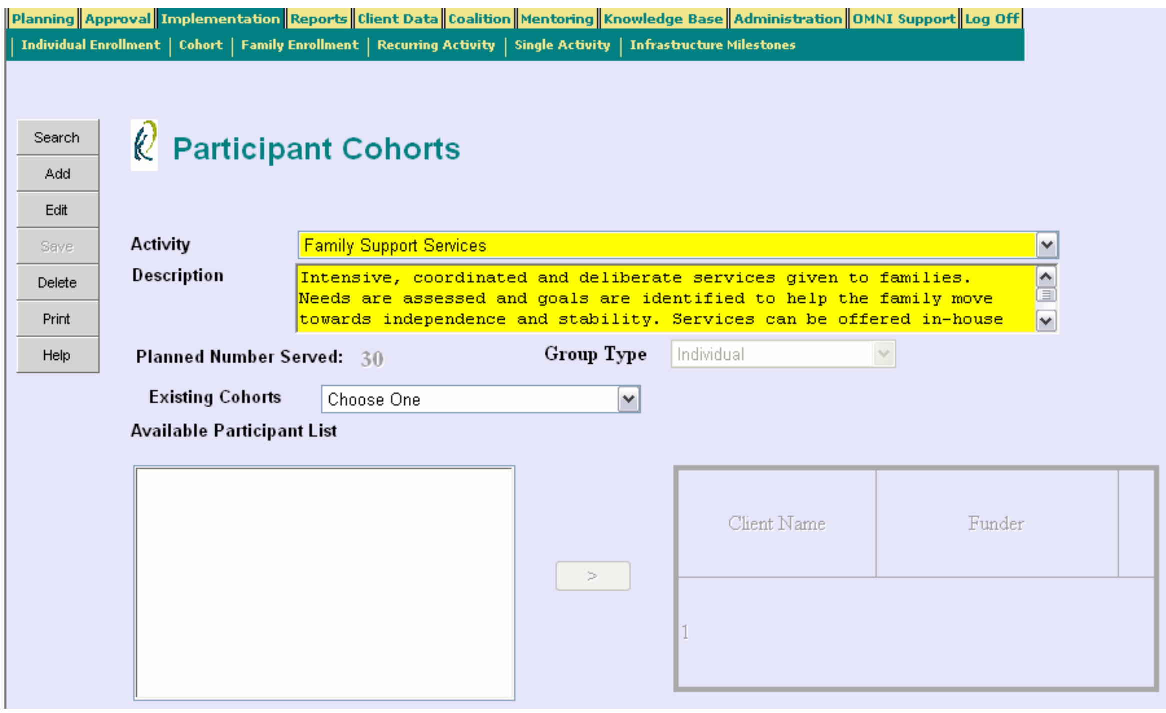
6. When all necessary changes have been made, click **Save**.

COHORT SCREEN

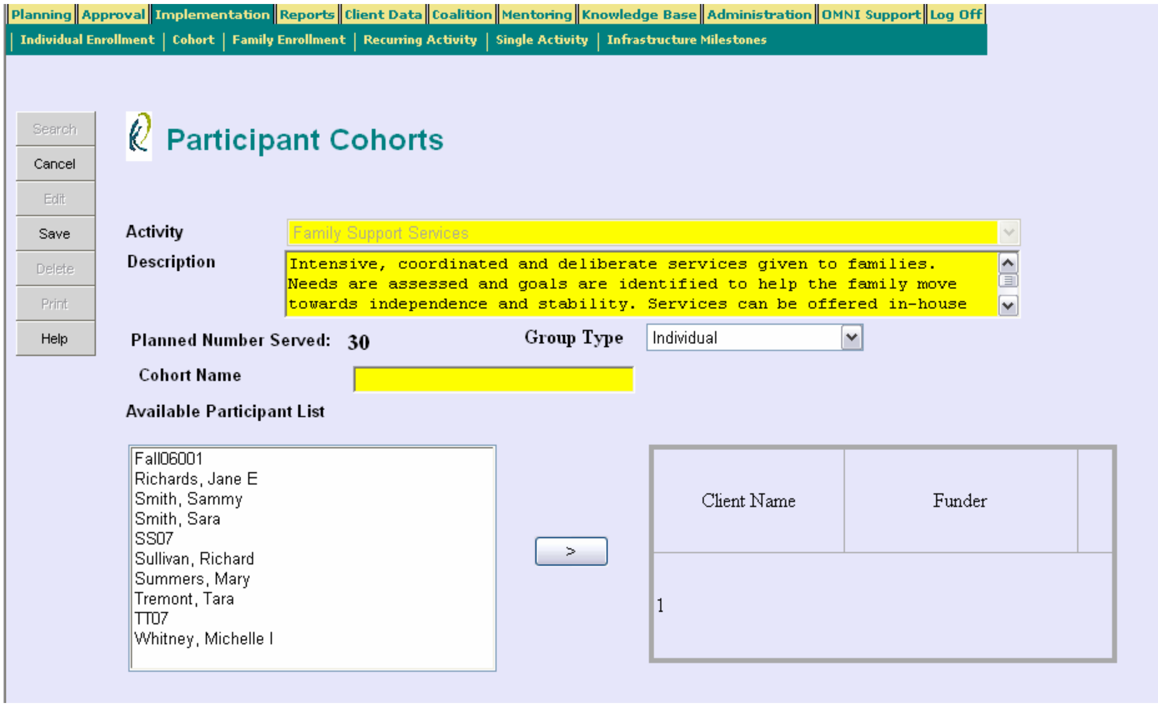
Cohorts are the groups assigned to the various activities and are necessary to proceed in the CO KIT system. In the case of the Family Support Assessment, the activity is providing services to families. Cohorts provide a way to group individuals or families together so that they can be tracked as a larger group. Participants can be grouped into a cohort depending on the time of year that they enrolled in the program or the time period during which they began receiving services, for example Fall 2006. After individuals are enrolled in your programs (Individual Enrollment screen) they need to be assigned to cohorts before moving on with the entry process.

STEPS for Adding a New Cohort

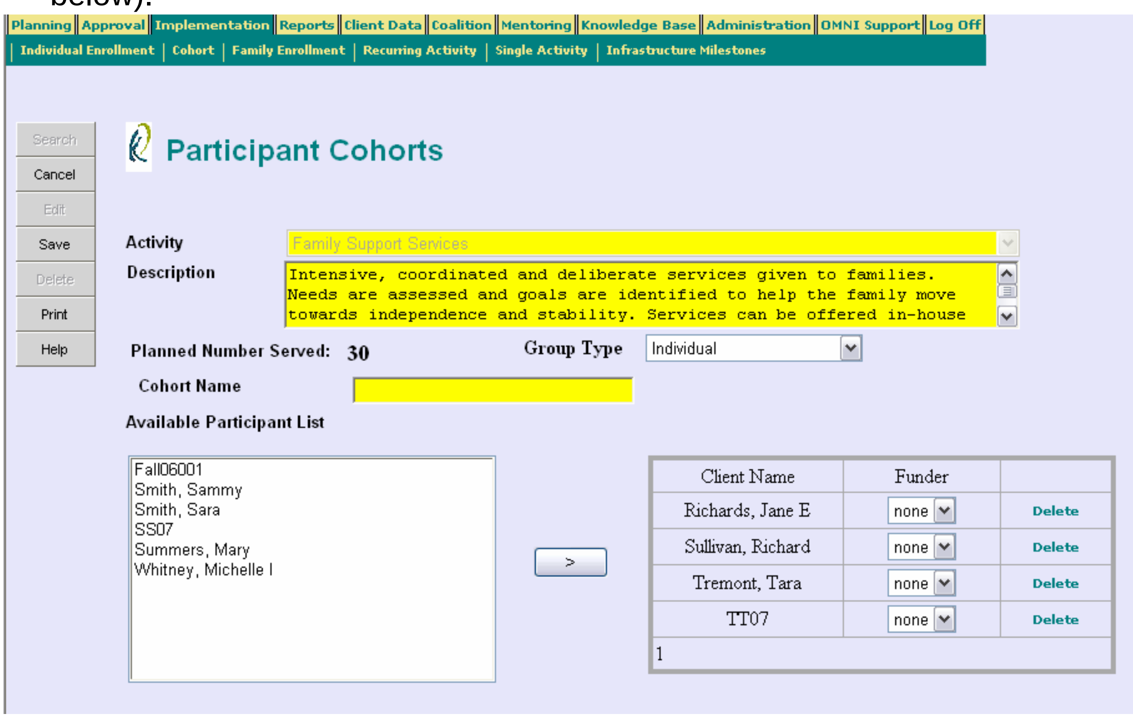
1. Click the **Implementation** module, followed by the **Cohort** screen.
2. Click the **Activity** field's drop-down list and select the activity for which you are creating the cohort. It will be Family Support Services.



3. The **Description** and **Number Served** fields automatically populate once you select the activity (see example above).
4. Click **Add** to create a new cohort. Type the name of your cohort into the **Cohort Name** field, which is now yellow and open for data entry. While you may name the cohort whatever you wish, having the name you select correspond with the time period of the program is recommended. **TIP:** Do not use special characters when naming your cohort ("&," apostrophes, etc).



5. Notice the **Participant List** at the bottom left of the above screen. This list includes all of the individuals you enrolled in the CO KIT system previously. (see example above).
6. From the **Participant List**, click on the individual's name you are adding to this cohort. Holding down the "Ctrl" button on your keyboard while you click your selections enables you to highlight more than one participant.
7. Once you have selected your participant(s), click the gray ">" key between the **Participant List** and the **Client Name/Funder** box. The participant(s) you selected shifts into the **Client Name** box, forming your cohort (see example below).



8. If you have multiple funding sources, you can choose the Funder that corresponds to a particular individual by selecting it from the drop-down arrow under the **Funder** heading. This feature, however, is **optional**.

STEPS for Editing and/or Adding More Participants to an Existing Cohort

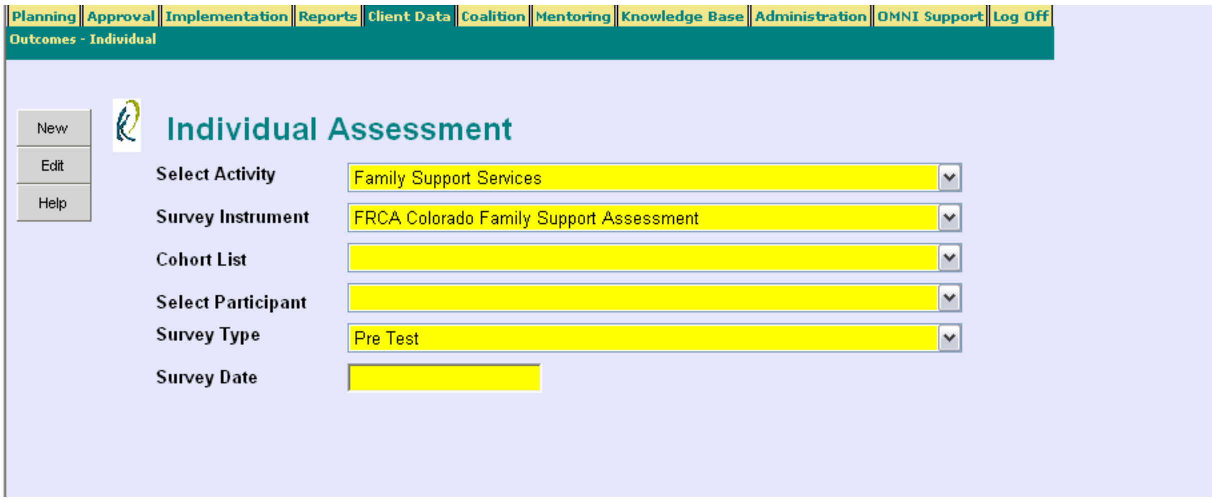
1. Click the **Activity** field's drop-down list, select Family Support Services.
2. Click the **Existing Cohorts** field's drop-down arrow and select the cohort you want to modify and/or add to.
3. Click the gray **Edit** button on the left toolbar. The form opens for data entry and you can make changes to information previously entered for that cohort.
4. When you are done making changes, click the gray **Save** button.

CLIENT DATA MODULE

OUTCOMES-INDIVIDUAL SCREEN

The **Outcomes-Individual** screen in the **Client Data** module allows CO KIT users to input participants' answers to Pre-Tests and Post-Tests. After the program is entered and the participant is enrolled and assigned to a cohort, the Individual Assessment page is accessible, which enables surveys *by individual (or in this case, by family)* to be completed.

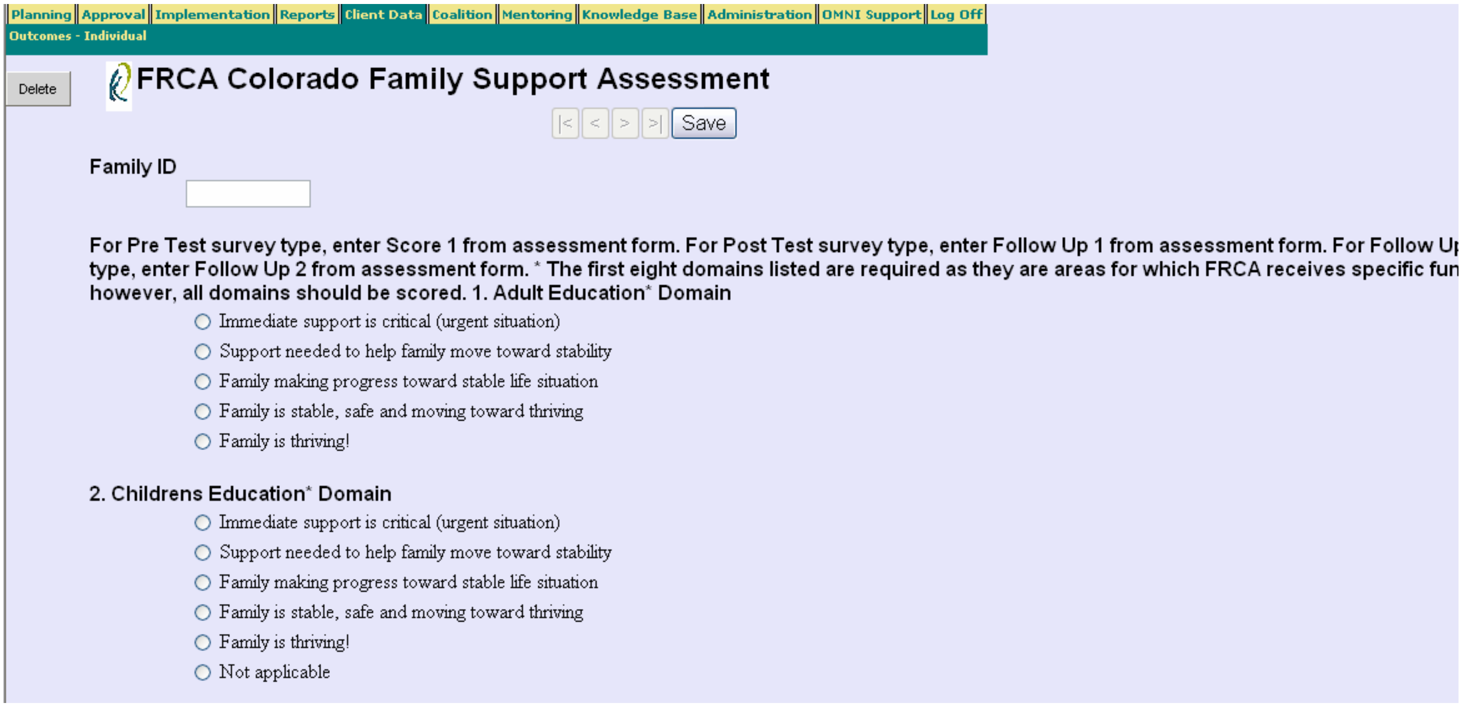
STEPS for Completing the Family Support Assessment



1. Click the **Client Data** module, then **Outcomes-Individual** screen. The screen header reads "Individual Assessment" (as seen above). As with previous modules, all yellow fields require data.
2. In the **Select Activity** field, click the down arrow and select the appropriate activity. The activity will be "Family Support Services" (as shown above).
3. In the **Survey Instrument** field, click the down arrow and select the survey instrument you are filling out for the participant. It will be the "FRCA Colorado Family Support Assessment"
4. In the **Cohort List** field, click the down arrow and select one of the groups that you have created.
5. In the **Select Participant** field, click the down arrow and select the participant who filled out the survey. Only the participants from the cohort you've chosen will be available in this list.
6. In the **Survey Type** field, select the type of survey you will administer / have administered. You will always select pre test for the initial data entry, or "score one" from your assessment. After you have entered a pre test, the system will give you the option to enter a post test, which is considered "follow-up one" from the assessment. When you enter the "second follow-up" on the assessment for families, you will choose the follow-up option under survey type. **NOTE:** Pre-test

data must be entered first. Once it is, you are then allowed to enter post-test data and follow-up data.

7. Click the field labeled **Survey Date** and enter the date you administered the survey (MM/DD/YY).
8. Click the gray **New** button on the left toolbar. The survey instrument you chose will be displayed. (see Assessment below)


Planning | Approval | Implementation | Reports | Client Data | Coalition | Mentoring | Knowledge Base | Administration | OMNI Support | Log Off

Outcomes - Individual

Delete

FRCA Colorado Family Support Assessment

|< < > >| Save

Family ID

For Pre Test survey type, enter Score 1 from assessment form. For Post Test survey type, enter Follow Up 1 from assessment form. For Follow U type, enter Follow Up 2 from assessment form. * The first eight domains listed are required as they are areas for which FRCA receives specific fun however, all domains should be scored. 1. Adult Education* Domain

- Immediate support is critical (urgent situation)
- Support needed to help family move toward stability
- Family making progress toward stable life situation
- Family is stable, safe and moving toward thriving
- Family is thriving!

2. Childrens Education* Domain

- Immediate support is critical (urgent situation)
- Support needed to help family move toward stability
- Family making progress toward stable life situation
- Family is stable, safe and moving toward thriving
- Family is thriving!
- Not applicable

9. To complete the Family Support Assessment, click the answers and/or fill in data that correspond with the participants' answers on the hard copy of the assessment. Click on the circle next to the answer to each question. Important- once a button has been chosen, it can only be changed by clicking on another button. It cannot be deleted by clicking on it twice so make sure to leave answers completely blank if the participant did not answer the question.
10. If you want to return to the Individual Assessment screen without saving the answers, click the Back button on your browser.
11. Enter as many or as few answers as you have information for. You will be able to move on without completing each question in the case that not all domains have been answered by the family.
12. When you are finished entering the data, click the gray **Save** button found at the top of the on-line survey. You are returned to the Outcomes/Individual "Individual Assessment" screen for the same participant.

STEPS for Entering 1st Follow-Up

1. Click **Survey Type** and you will see that **Post Test** now displays for the participant. Repeat steps 7 – 12. **Use the post-test option to enter the first follow-up for the family.**
2. To enter data for each participant who completed the same survey, repeat steps 5 – 12.

STEPS for Entering 2nd Follow-Up

1. Click **Survey Type** and you will see that **Follow-Up** now displays for the participant. Repeat steps 7 – 12. **Use the follow-up option to enter the second follow-up for the family.**
2. To enter data for each participant who completed the same survey, repeat steps 5 – 12.

STEPS for Editing Outcomes-Individual Data

1. If you discover an error after saving a participant's data, you may edit the survey form.
2. In the **Select Activity** field, click the down arrow and select the appropriate activity.
3. In the **Survey Instrument** field, click the down arrow and select the survey instrument you are filling out for the participant.
4. In the **Cohort List** field, click the down arrow and select the appropriate group that you created.
5. In the **Select Participant** field, click the down arrow and select the participant who filled out the survey.
6. In the **Survey Type** field, and select the type of survey administered/the survey that would like to edit.
7. Click the **Edit** button. The completed survey instrument displays for the participant selected, and you may now make changes.
8. When you are finished editing the data, click the gray **Save** button at the top of the on-line survey form. Repeat steps 2 – 7 for each participant whose survey you are editing.

STEPS for Reviewing Previously Entered Surveys

1. Click the **Select Activity** field's down arrow and select the activity used for the individual assessment.
2. Click the **Survey Instrument** field's down arrow and select the Survey Instrument used for the individual assessment.

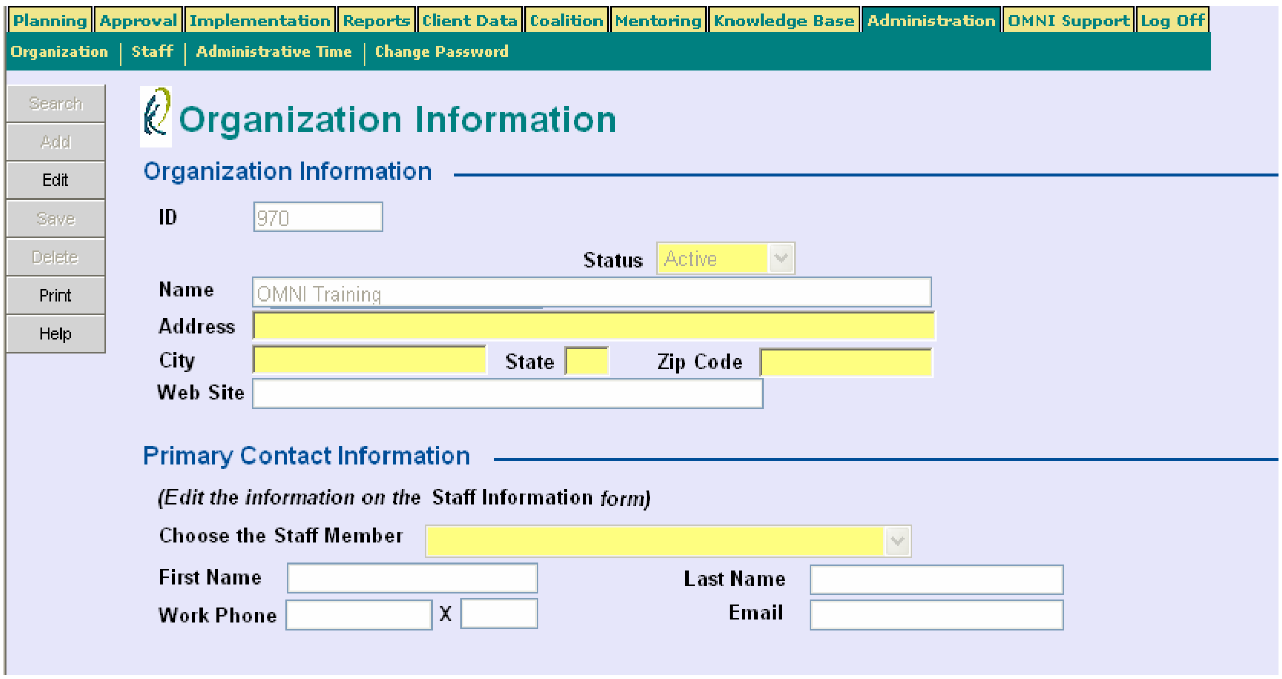
3. Click the **Cohort List** field's down arrow and select the group the participant belongs to and for whom an assessment was completed.
4. Click the **Select Participant** field's down arrow and select the participant for whom the assessment was originally completed.
5. Click the **Survey Type** field's down arrow and select the survey you will be administering / have administered.
6. After all data has been entered into the fields, click the **Edit** button on the left toolbar to review that survey for that participant.
7. Click the **Back** button to return to the Individual Assessment screen if you have not made any changes that you want to save.

ADMINISTRATION MODULE

The Administration module allows you to capture information on your organization and staff members. This is where you register staff members and reset passwords. You may also record administrative hours not *directly* tied to a program, such as entering data into the CO KIT system, if the information is useful for your organization.

ORGANIZATION SCREEN

In this section you will record contact information for your organization.

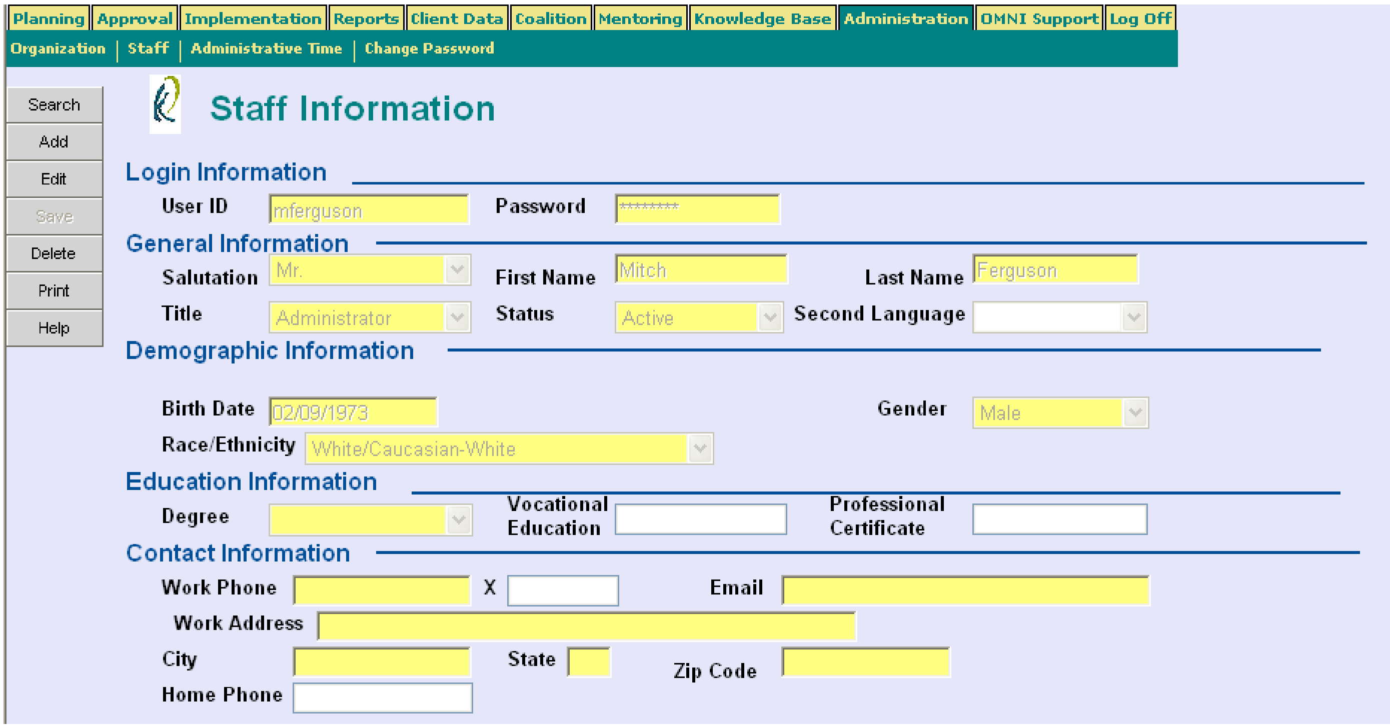


STEPS for Adding / Editing Organization Information

1. To access this screen select the **Administration** module and the **Organization** screen.
2. The **ID** and **Name** fields automatically populate.
3. Click the gray **Edit** button on the left toolbar.
4. Fill in your organization's **Address**, **City**, **State** and **Zip Code**. The **Web Site** field is optional.
5. Beneath the **Primary Contact Information** heading, fill in the information for the individual you would like to use as the CO KIT main contact.
6. Click the gray **Save** button on the left toolbar.

STAFF SCREEN

In order to have access to all CO KIT system screens, a staff member must be entered into the **Staff** section. Registering staff members allows you to track staff members and assign levels of access to the CO KIT system.



STEPS for Registering Staff Information

1. To access this section, click the **Administration** module and the **Staff** screen.
2. Click the gray **Add** button on the left toolbar.
3. Select a **User ID** and **Password**. These will be specific to the individual staff member. There are no requirements on the length or type of characters you may use for the User ID and Password.
4. Enter the staff member's **First Name** and **Last Name**.
5. Select the staff member's **Title**. A staff member's **Title** determines the level of access they will have to the CO KIT system. Although several titles display in the drop-down menu, only the following four titles are valid in CO KIT:

    Administrator: The most common selection. Selecting Administrator gives the staff member full control and access to all screens.

    Contractor: Only allows full control in the Reports module. Contractors have no access to the Administrative module and only have read-only access to the other modules.

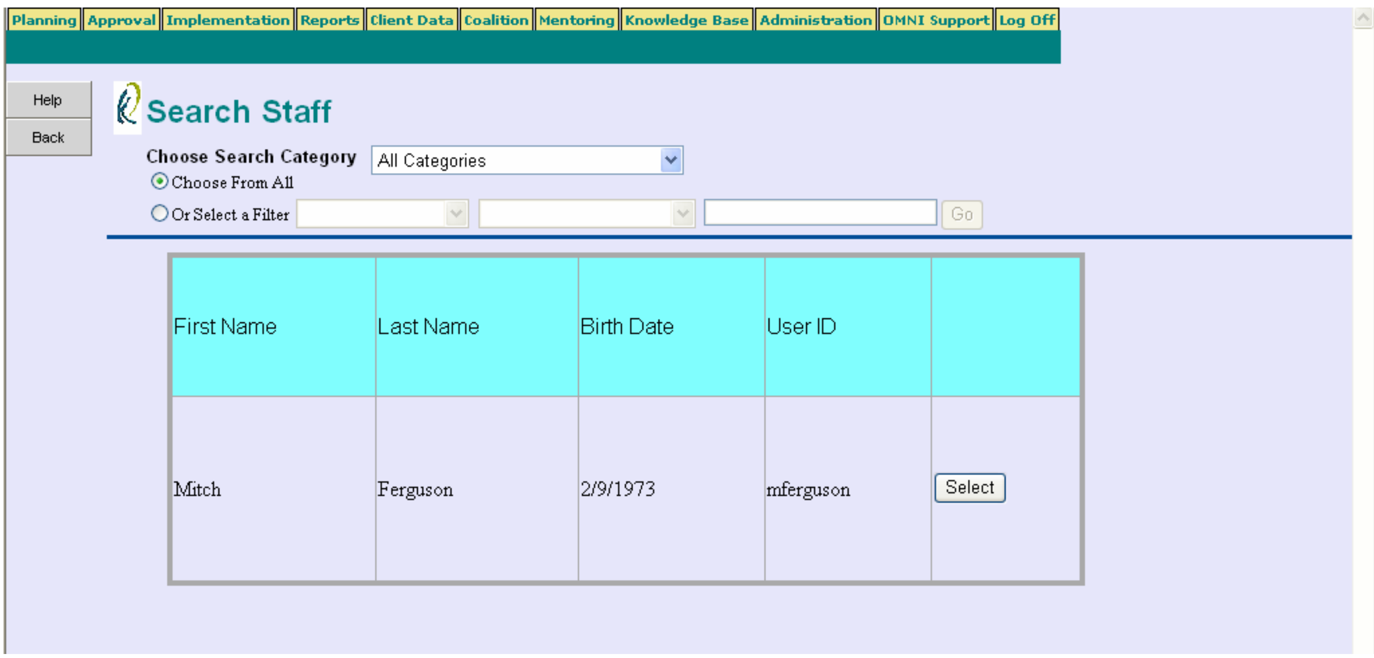
    Data Specialist: Read-only access to the Administration module (except for Staff screen, where no access is allowed). The Planning and Approval modules are read only. All other modules have full control.

<u>Other</u>: Grants read-only access to all modules.

6. Enter the staff member's **Demographic Information**, **Education Information** and **Contact Information**.
7. Click the gray **Save** button on the left toolbar.

STEPS for Editing Staff Information

1. Click the gray **Search** button on the left toolbar.
2. Select **Choose From All** to list all of your staff members.

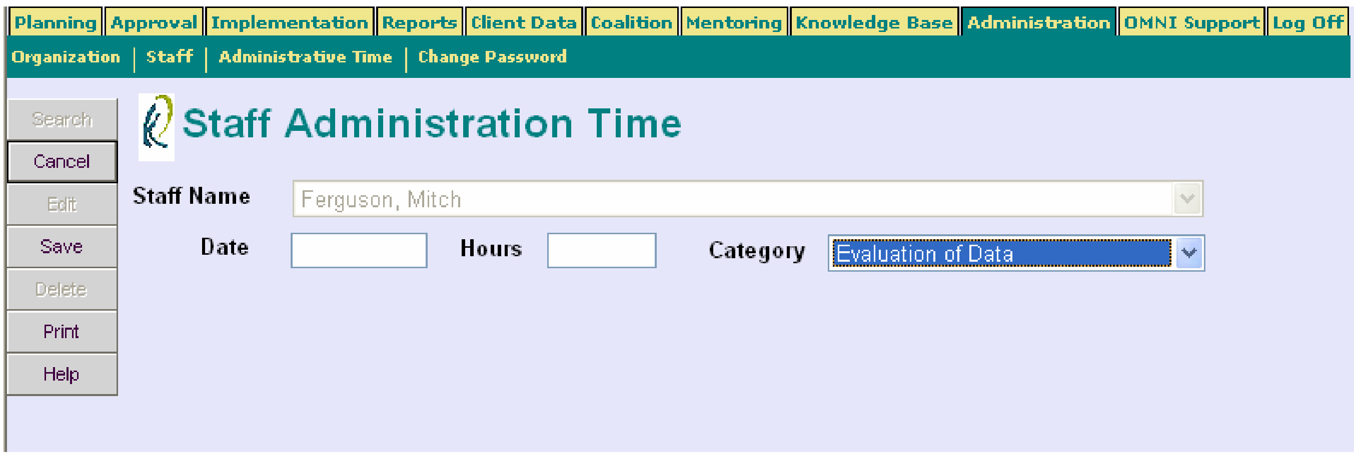


3. Click **Select**.
4. Click **Edit.**
5. Make necessary changes to the individual's staff information.
6. Click **Save**.

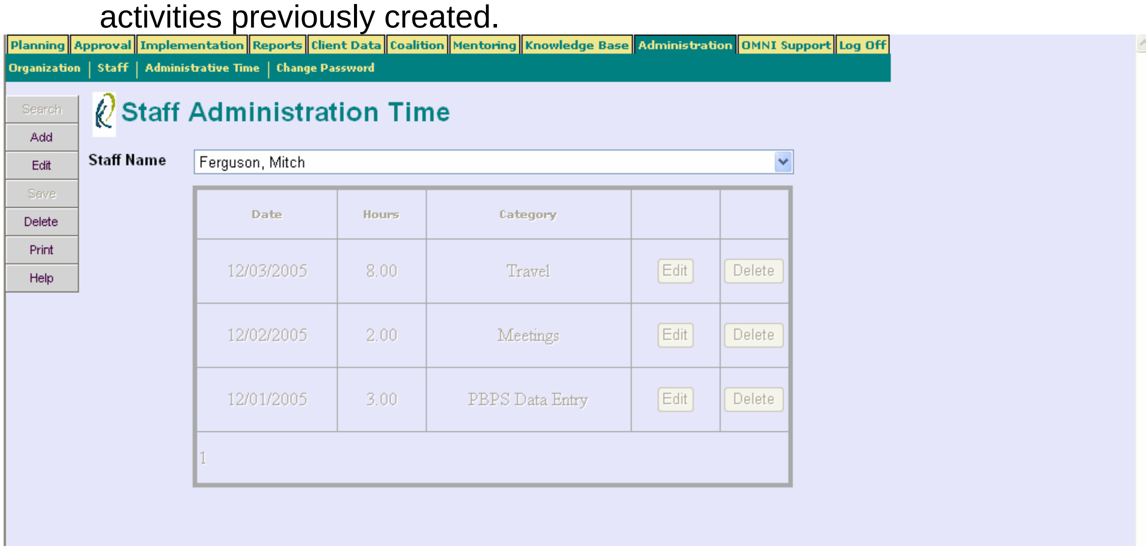
ADMINISTRATIVE TIME SCREEN--OPTIONAL

In the **Administrative Time** section you are able to track staff members' time spent on administrative activities for your programs, such as data entry, travel and meetings.

STEPS for Tracking Administrative Time



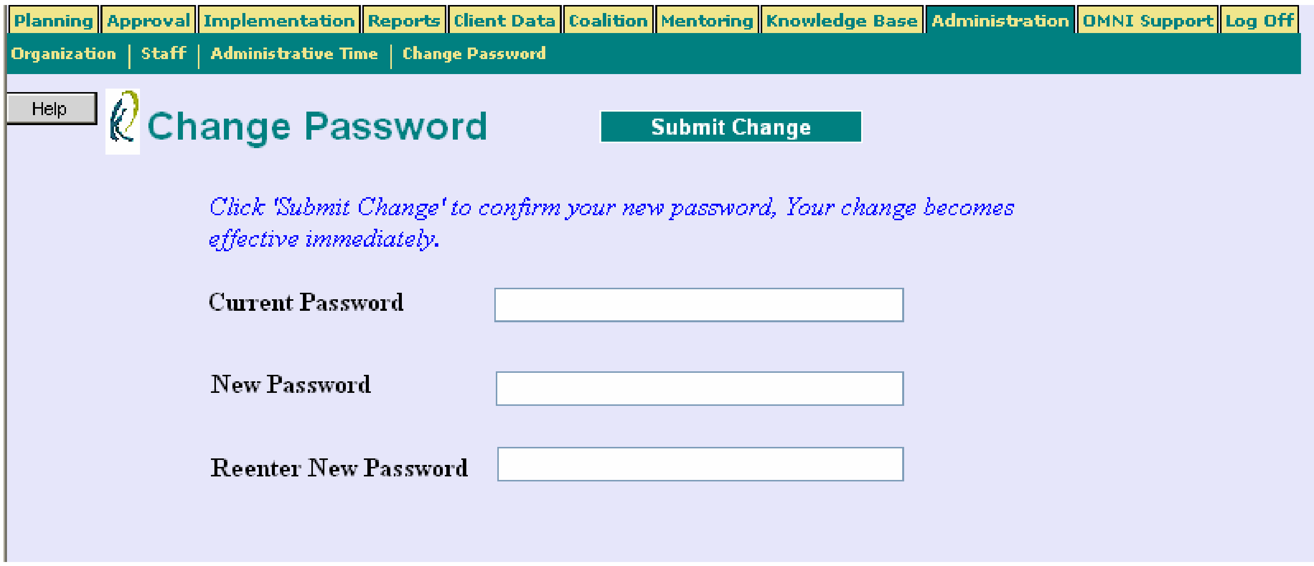
1. To access this section, click the **Administration** module and the **Administrative Time** screen.
2. From the drop-down menu in the **Staff Name** field, select the staff member you wish to track time for.
3. Click **Add**.
4. From the **Category** drop-down menu, select the administrative activity performed by the staff member.
5. Enter the **Date** and **Hours** spent on the activity.
6. Click the gray **Save** button on the left toolbar.
7. As you add administrative activities, they will be added to the list of all other activities previously created.



8. Click the **Edit** or **Delete** buttons to make changes to the date, category or hours. Remember to click **Save** if you make any changes.

CHANGE PASSWORD SCREEN

You may change a staff member's password at any time. CO KIT, however, will not prompt you to change your password at any time.



STEPS for Changing a Password

1. To change a password, click the **Administration** module and the **Change Password** screen.
2. Enter the **Current Password**.
3. Enter the new password in both the **New Password** and the **Reenter New Password** fields.
4. Click the green **Submit Change** bar.
5. This changes the password associated with the User ID used to log on to the system.

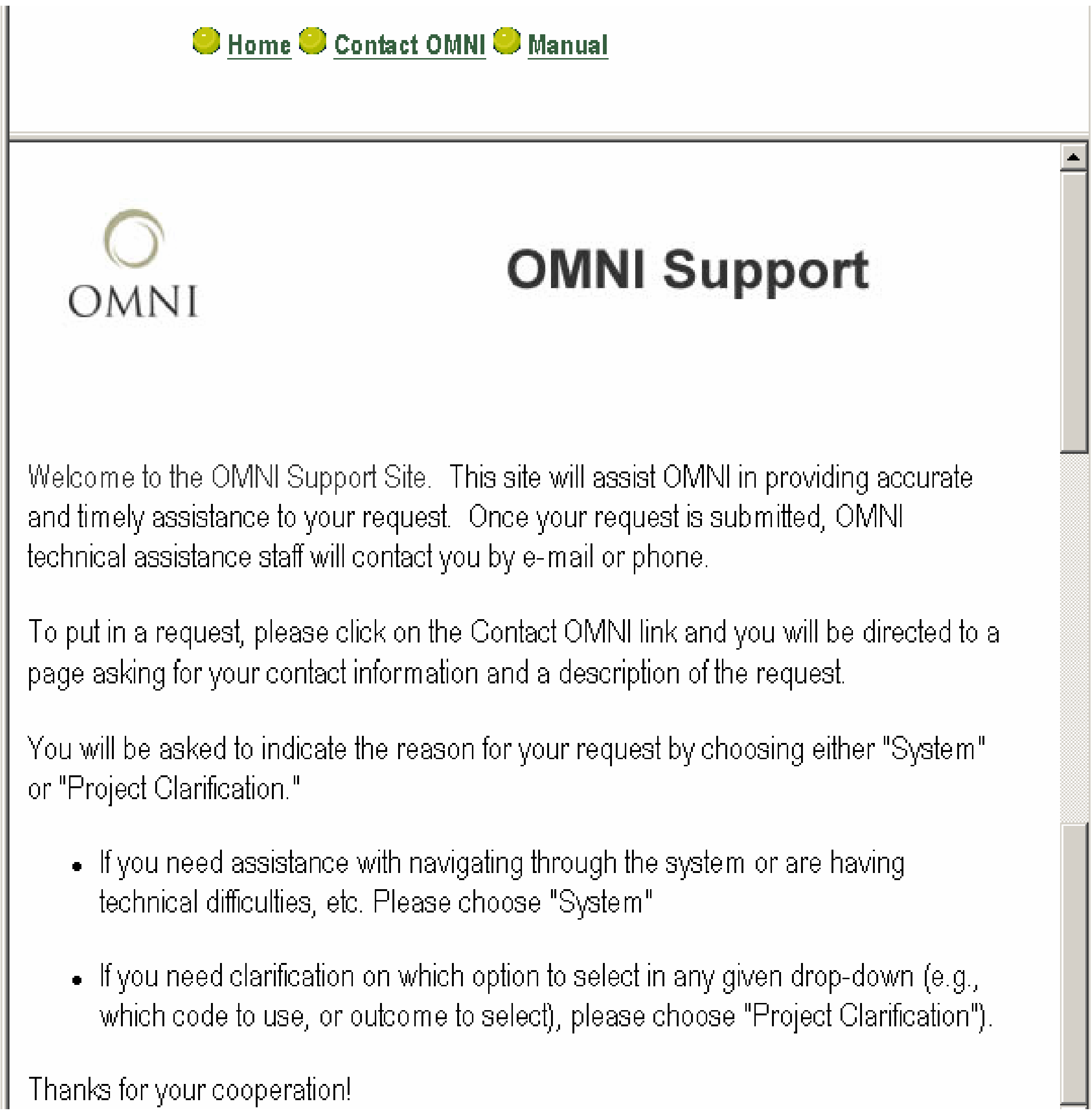
OMNI SUPPORT MODULE

OVERVIEW OF OMNI SUPPORT

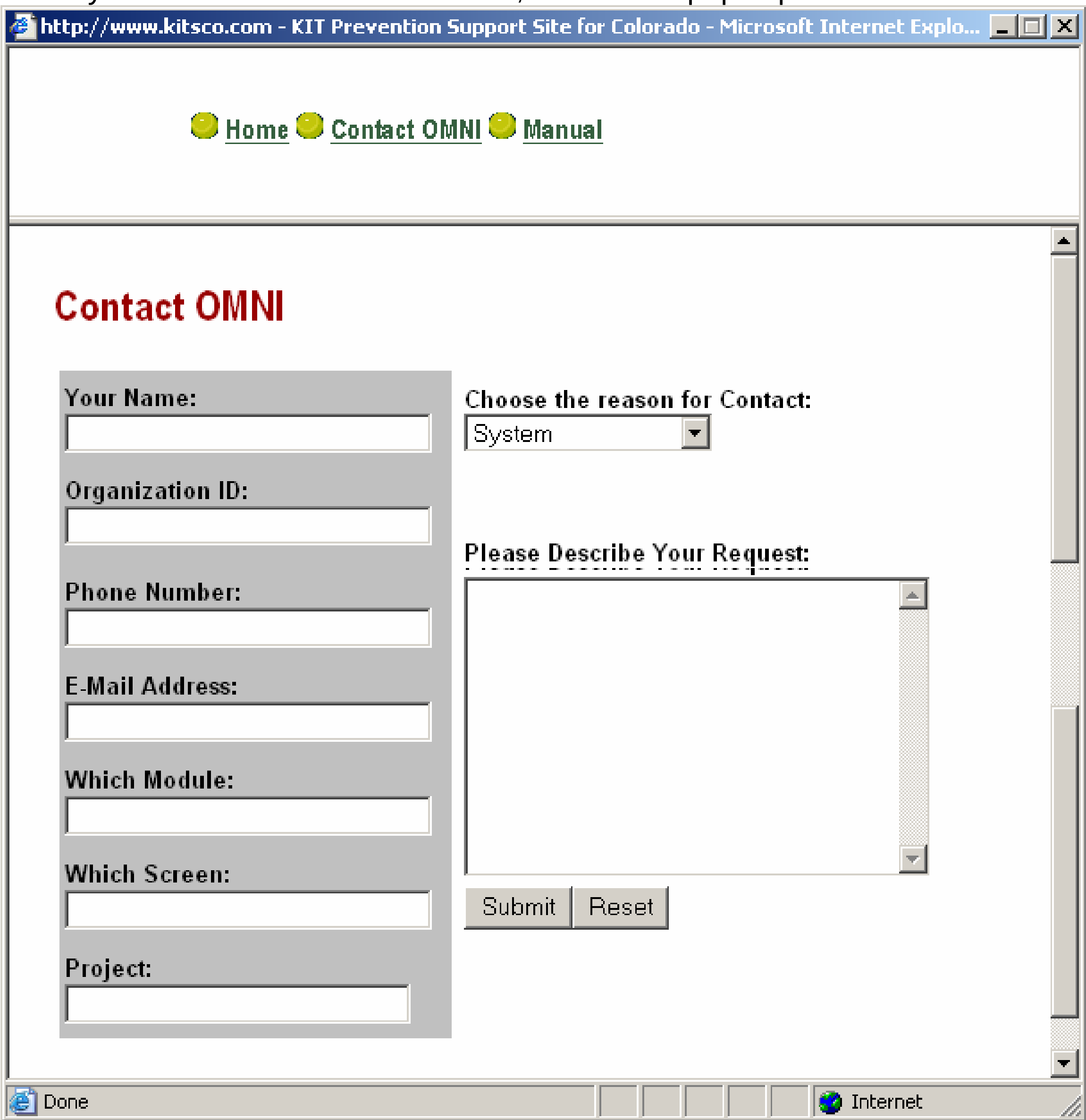
The OMNI Support site enables you to request technical assistance in order to resolve problems, report system bugs, and suggest improvements. Please note that “Pop-ups” must be allowed from the CO KIT site for this screen to appear.

STEPS for Submitting Technical Support Requests

1. Click the **OMNI Support** module, and the screen below pops up.
2. To submit a problem, question, or suggestion for improvement to the CO KIT Technical Support team, click the **Contact OMNI** link.



When you click the **Contact OMNI** link, this screen pops up:



3. Fill in all fields on the **Contact OMNI** form, including: Your Name, ORG ID, Phone Number, E-Mail Address, Module, Screen and Project.
4. In the **Choose the reason for Contact** field, select **System** or **Project Clarification**.

   Examples of System Issues: technical difficulties or "bugs," navigating through CO KIT.

   Examples of Project Clarifications: help determining whether an activity is single or recurring, how to enter your RFP/grant into CO KIT, which code to use, selecting an outcome.

5. In the **Please Describe Your Request** box, explain the nature of the problem you are experiencing.
6. Click the gray **Submit** button to send your request for support to the OMNI CO KIT Technical Support team. A notice displays confirming your request was delivered.
7. Click **Reset** if, and only if, you want to clear the form and start over. **NOTE:** All fields will be erased, including name, ORG ID and so on.