New York Coalition

Getting Started Guide

VERSION 1.0
July 2011

KIT Solutions®, LLC
5700 Corporate Drive
Suite 530
Pittsburgh, PA 15237

support@kitsolutions.net
1-888-600-4777

TABLE OF CONTENTS

TIPS FOR USING THE SERVICE EFFECTIVELY

Recommended Computer Settings

Screen Resolution

You will get the best screen layout if you set your PC monitor settings to 1024 X 768 pixels or larger. If your screen resolution is smaller (i.e., 800 X 600 pixels), everything on the screen will appear larger. But, if you use 800 X 600 pixels you will have to scroll more both up & down and left & right to access all the data fields.

To change your PC monitor settings, right click on the **Desktop background** and select **Properties.** Next, click on the **Settings** tab and move the **Screen Resolution** scroll bar to the right (towards "more") to select 1024 X 768 (or larger) resolution. Click the **OK** button at the bottom of the window to make the change effective.

*Note: The above steps apply to a PC and may not work if you are using a MAC.

Web Browser

The web browser supported by NY KIT Prevention Service (KPS) is Microsoft Internet Explorer (IE). Mozilla Firefox, Netscape, Safari and other browsers may not be supported by NY KIT Prevention Service (KPS). They may function but not to design specifications. We recommended users have the latest version of IE installed on their computer along with the updates provided by Microsoft (which are released periodically).

Pop-Up Blockers

Modern computer security technology and usability features development have lead to pop-up blocking. Although these new features of internet browsers, toolbars, and other 3rd party managing software blocks hazardous and annoying pop-ups, sites like NY KIT Prevention Service (KPS) require pop-ups to be able to function. If your pop-up blocker is enabled, there is a possibility that NY KIT Prevention Service (KPS) may not function or appear properly. You should either disable the pop-up blocker while using NY KIT Prevention Service (KPS) (while remembering to enable it, if desired, when not in NY KIT Prevention Service (KPS)) or create exceptions for the pop-up blocker. This is cumbersome, but may be easier than making exceptions to the pop-up blocker.

To create exceptions for the pop-up blocker, open your Internet Explorer browser window. Once the browser is open, click the top toolbar option "Tools" and then go to "Internet Options". After the "Internet Options" window is available, you will want to click on the "Privacy" tab at the top of the window. You will notice while on the "Privacy" tab, at the bottom will be a section on Pop-Up Blockers. If your "Block Pop-Ups" checkbox is checked then click on the "Settings" button. You can now add the NY KIT Prevention Service (KPS) link to the "Allowed Sites" list which the pop-up blocker will ignore when trying to block pop-ups from NY KIT Prevention Service (KPS).

*Note: These are instructions for Internet Explorer 6.0 and may be different for other Internet Explorer version.

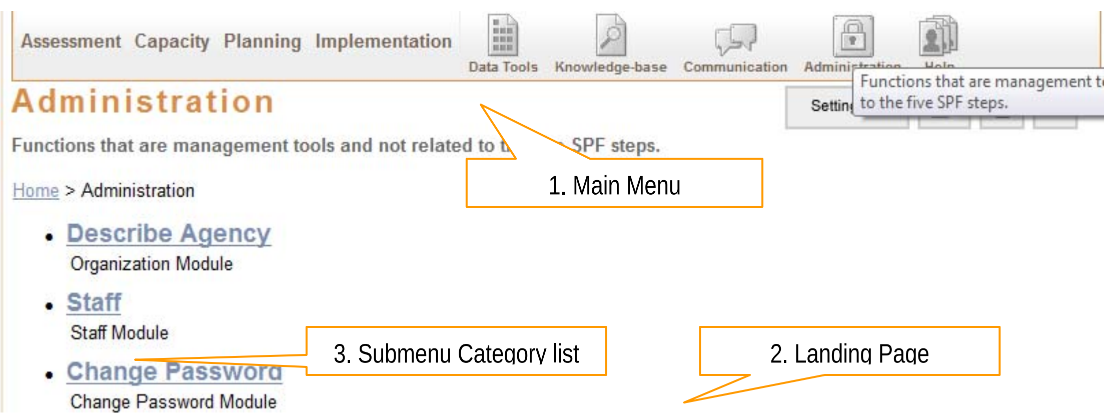
Application Navigating

The NY KIT Prevention Service (KPS) is set up in such a fashion that moving from Left to Right on the menu is the best approach to using the application. Start at the Logic Model module, filling in all the information for that area, before moving on to the Planning module. Continuing in this manner will ensure that all of the sections of the application have enough information to function correctly. If all of the different portions are not completed, some modules will not work correctly.

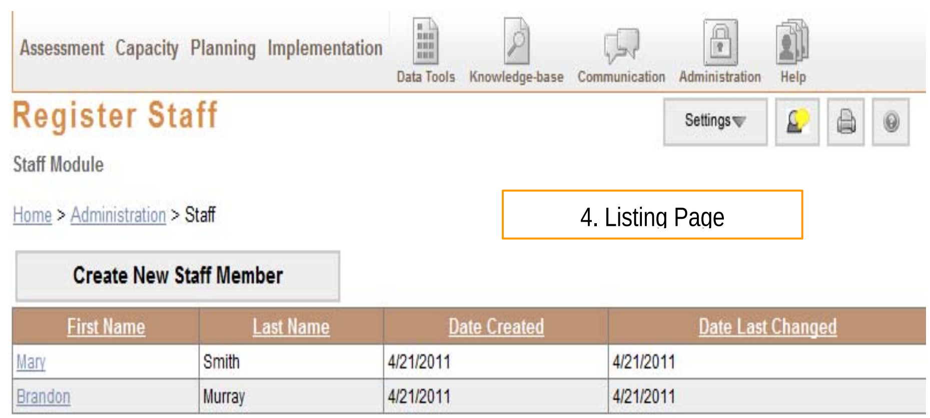
Menu Information

The Menu for the service is located across the top of the screen. Some Menu categories may be broken down into submenu categories to choose from. The Menu categories list the main modules that are within the application. When a Menu category is selected a list of Submenu categories will be displayed on the Landing Page as links to access the modules. (For more information on Landing Pages, see the Landing Pages section.)

1. Menu	Constant (unchanging). Available at all times.
2. Landing Page	Varies depending on which Menu category is selected. Displays the Submenu Categories.
3. Submenu Category	Varies depending on which Menu category is selected.
4. Listing Page	Varies depending on which Submenu Category is selected.



(This is a screenshot displaying the Main Menu (1), a Landing Page (2) and a Submenu Category list (3))

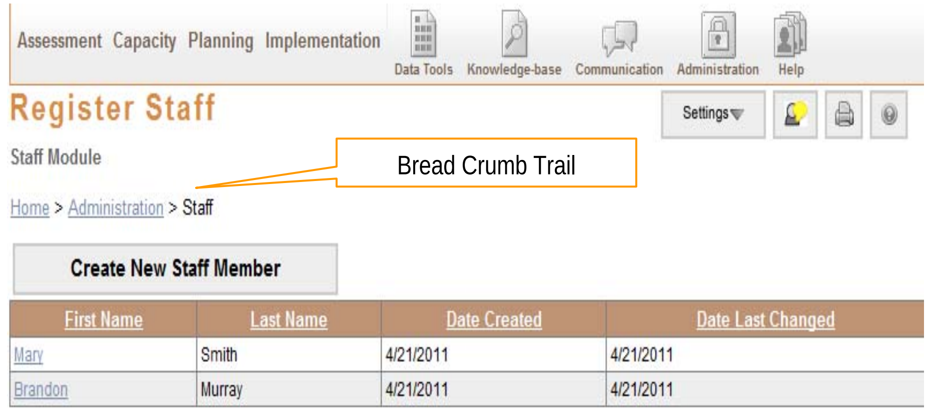


(This is a sample screenshot displaying a Listing Page (4))

Bread Crumb Trail

A "Bread Crumb Trail" is provided to indicate where you currently are in the system. The links provided in the Bread Crumb Trail also allows you to move **backwards** in the system.

- If at any time while working in the application you wish to return to the Home page, you can click the **Home** link located within the Bread Crumb Trail.



Tips

- Clicking the *KIT Prevention Service – NY Coalition* banner above the Menu will also return you to the Home page.

Listing Pages

After selecting a category from the Landing Page you will see the “Listing Page”. When going into an area where a Listing Page is available, the service allows you to select previously entered data to edit or view its content. No data is entered on the Listing Page.

- When viewing a Listing Page, all of the data is available for review.

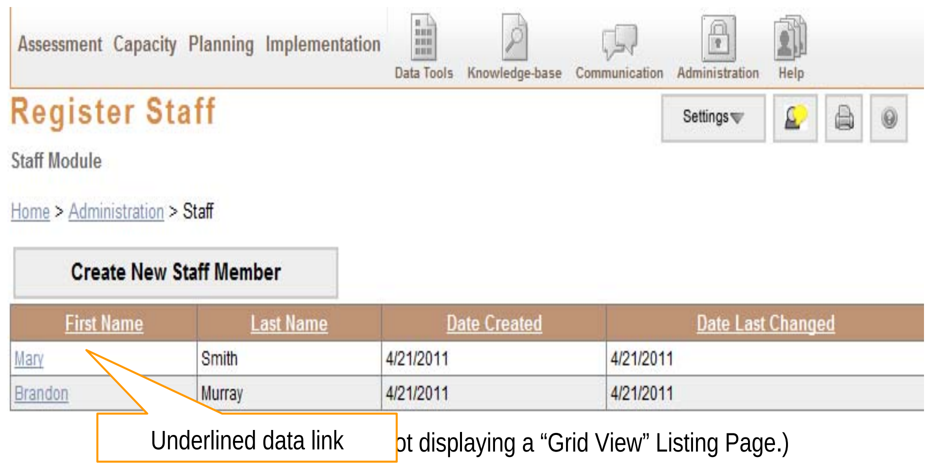
There are three types of Listing Pages:

1. Grid View
2. Hierarchy View
3. Single Form View

Grid View:

The Grid View displays the data in tables. Specific pieces of data will be displayed within the Grid based on the fields within the entry/edit form.

- When first viewing a Listing Page, all of the data is available for review. Click the underlined Name of the data (Mary) you would like to edit/view.
- You will be taken to the entry/edit screen. This page will be in edit mode (all data fields will be open for data entry). Make any changes needed to the form. Click the Save (Save) button to save the changes.



ot displaying a “Grid View” Listing Page.)

Tips

- If this is the first time data is being entered the Listing Page will be empty.
- Clicking on the field name in a Category field (e.g., First Name) will allow you to sort through your files by ascending or descending order.

Computer Keys

While entering information into a form, several keys are helpful for moving the cursor from one information box (called a data field) to another. The table below summarizes those keys:

Key	Description	Function
	The Cursor	Points to desired location
	The TAB key	Moves the cursor to the next data field
	Hold down the SHIFT key and then press the TAB key	Moves the cursor to the previous data field
	The Control (Ctrl) key	Enables blocked material to open (due to pop-up blocker)
	Use the MOUSE by pointing and clicking to move the cursor	Moves the cursor by pointing and clicking

Data Fields & Buttons

In NY KIT Prevention Service (KPS) there are several fields, boxes, and buttons that are used to collect, store, print, organize and delete data. Here are some examples:

Type	Preview/Description
Text Field (aka 'Text Box')	
Dropdown List (aka 'Pull Down Menu')	
List Box Buttons	
Multiple Selector Box	Delinquency School Dropout Substance Abuse Teen Pregnancy
Radio Buttons	checked unchecked
Check Boxes	checked unchecked
Plus/Minus buttons	(click to open) (click to close)
Expand/Collapse buttons	(expand) (collapse)
Required field	**First Name**
Default Page	Default Page (For additional information, see the Default Page section)

Tips

- If a required field does not have data entered into it and you try to save the form, you will receive a message that informs you of the field vacant of data and you will not be able to save that form until that field has data. Some or all of the fields may be required in order to save the form. Those fields that are required are bold and with an asterisk next to the field name.
- To select multiple data at one time from a Multiple Selector Box or List Box, hold the control (**Ctrl**) key on the keyboard and left click the mouse on any of the data options that you'd like to include in your entry.
- Type an identifying letter of an item in a dropdown list to appear in the box.

Default Page

When the ☐ Default Page (**Default Page**) checkbox is selected for a particular page within the NY KIT Prevention Service (KPS), the user will be taken directly to the selected page upon login.

Edit Form Buttons

Information is entered and edited through the Edit Forms. The table below summarizes the buttons used to enter/edit information into an Edit Form.

Delete	Removes the information currently on an Edit Form from the NY KIT Prevention Service (KPS) database
Save	Adds the information on an Edit Form to the NY KIT Prevention Service (KPS) database
Cancel	Cancels the Add or Edit without saving any information entered

Additional Feature Buttons

Each page within the NY KIT Prevention Service (KPS) offers additional help to the user. Click on one of the icons to receive the help needed.

Settings	Allows you to change the size of the text displayed on the form. (For additional information, see the Settings section.)
	The Chat feature enables users to get immediate assistance from the Customer Support department through an instance messaging system.
	Prints the information currently on the form.
	Provides the multimedia tutorial video specific to the Submenu category.
	Provides user manual help specific to the submenu topic. Includes step by step instructions for adding, editing and deleting.
	Provides information on the topic with regards to treatment.

Below are some additional buttons that may appear on a page or form.

Select	Opens the information in the enter/edit form for viewing or modifications.
Show Report	Opens a selected report for viewing or printing.

Settings

You can alter the size of the text on a form by using the Settings (Settings) option. Clicking on one of the (Radio) button changes the text size from smallest to largest.

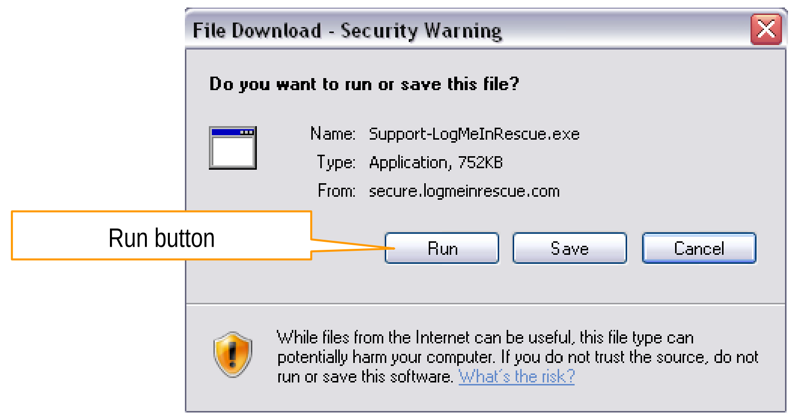
Small	Provides the smallest text size
Medium	Provides a medium (default) text size
Large	Provides the largest text size

1. Click the Settings (**Settings**) button.
2. Select the **Text Size** by selecting the appropriate radio button.
3. Click the Set (**Set**) button.
   *Note: Click the Cancel (Cancel) button to cancel the resizer.

Chat Feature

The Chat feature enables users to get immediate assistance from the Customer Support department.

- When the (**Chat**) button has been selected, a new window opens prompting you to run the LogMeInRescue applet (application).



(This is a screenshot of the download message to use the Chat feature.)

Tips

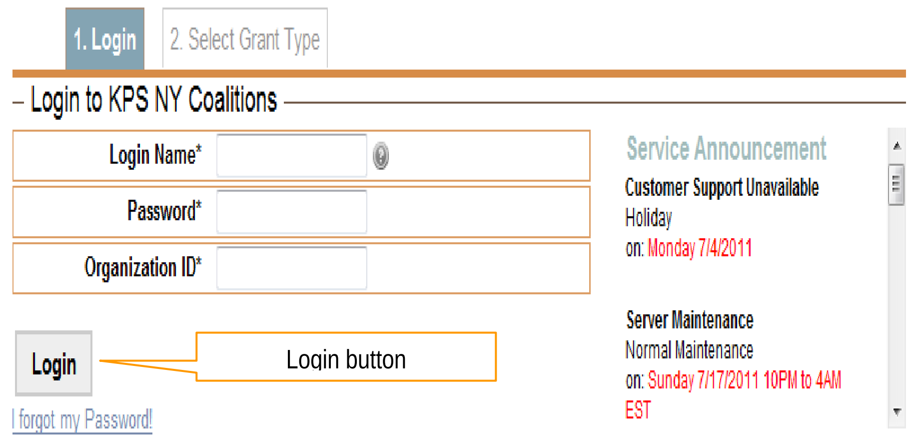
- You will need to install the LogMeIn applet in order to connect with Support. This is a free download.
- The installation may take a few minutes.

LOGIN PROCEDURE

Connect to the internet using an internet browser (i.e., Internet Explorer). In the Address field, type in the following website address and click Enter on your keyboard:

1. Enter the username (login name) provided by your acting administrator in the **Login Name** text box.
2. Enter the password in the **Password** text box.
3. Enter the organization ID in the **Organization ID** text box.
4. Click the Login (**Login**) button.

To log out of the application, click the Logout (Logout) link in the upper right hand corner.

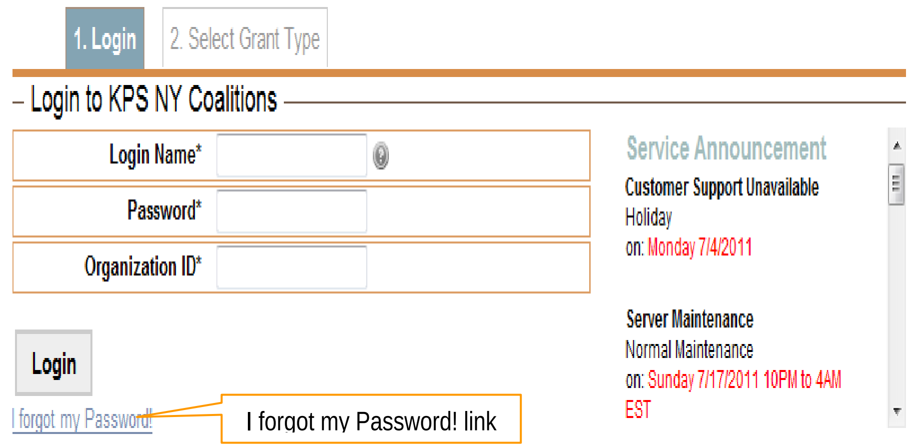


Tips

- The Login Name IS NOT case sensitive.
- The Password IS case sensitive.

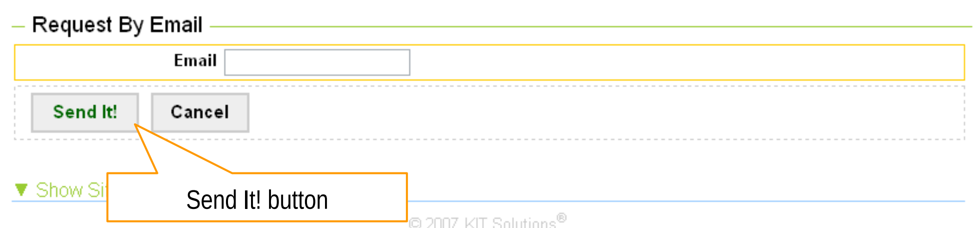
I forgot my Password!

If you are unable to log into the NY KIT Prevention Service (KPS) due to forgetting your Login Name or Password you can retrieve this information by clicking the link entitle I forgot my Password!.



1. Type your email address in the **Email** text box.
2. Click the (**Send It!**) button.

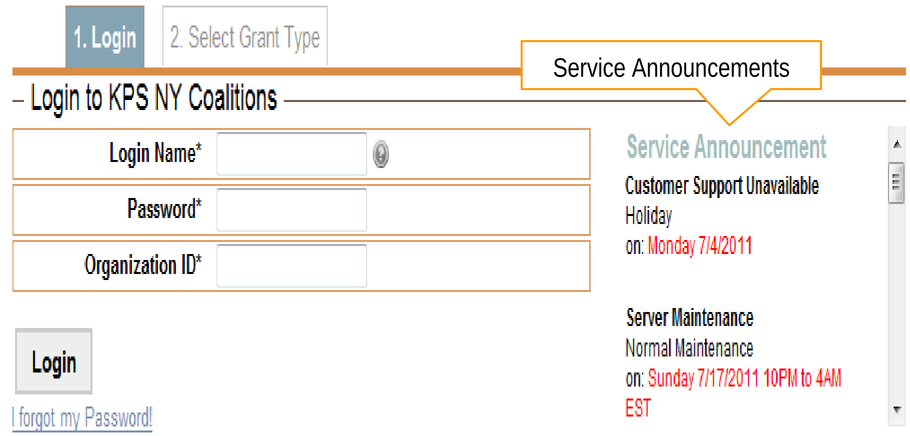
- You will receive a reply with our login information as long as the email address entered matches the email provided in the Staff module.



Service Announcement

The Service Announcement section that is located on the Login page is there to notify users that KPS is receiving any necessary server updates or other important messages regarding the application.

If you see Service Maintenance it means that KPS may be down for a short period of time and you will not be able to log into the application at that time. Server maintenance typically occurs once a month.



Temporary Account

When first accessing the NY KIT Prevention Service (KPS), a temporary account is provided. The temporary account is a one (1) time account used for logging into the NY KIT Prevention Service (KPS) and creating a system administrator (this person will register staff members into the NY KIT Prevention Service (KPS)).

1. Enter the “temporary account” user name in the Login Name text box.
2. Enter the “temporary account” password in the Password text box.
3. Enter the organization id in the Organization ID text box.
4. Click the Login (**Login**) button.
5. Upon login, you will be required to register a staff member. This will replace the “temporary account”. (For more information on registering staff, see the Staff section for instructions.)
6. Once the new staff account is created, an email notification will be sent to the email address entered on the Staff form. Follow the instructions within the email to activate the new account. (For additional information on activating an account, see the Activating Your Account section.) Upon activating the new account, the “temporary account” will become deactivated; therefore you can no longer login with the “temporary account”.

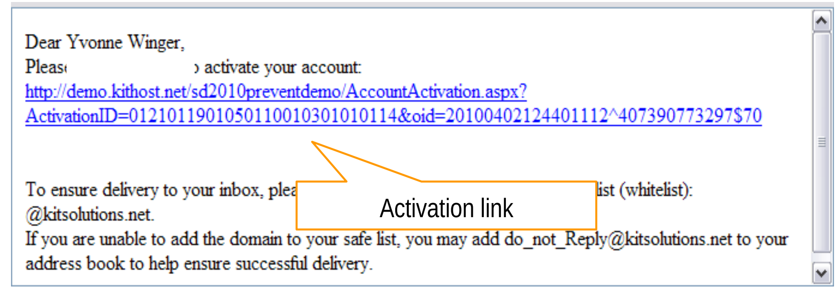
Tips

- When logging in using the “temporary account” you MUST create a new account. Click the (**Cancel**) button will log you out of the application.

Activating Your Account

Your login information is created for you by your System Administrator. Before accessing NY KIT Prevention Service (KPS) for the first time, you will need to activate your account.

1. Once you have been informed by your System Administrator that an account was created for you, check your email. You should receive an email with instructions for activation.
2. Click the activation link within the email to activate your account.



3. You should receive a confirmation message indicating your account was activated successfully. Click the **Login** link to log into the NY KIT Prevention Service (KPS).

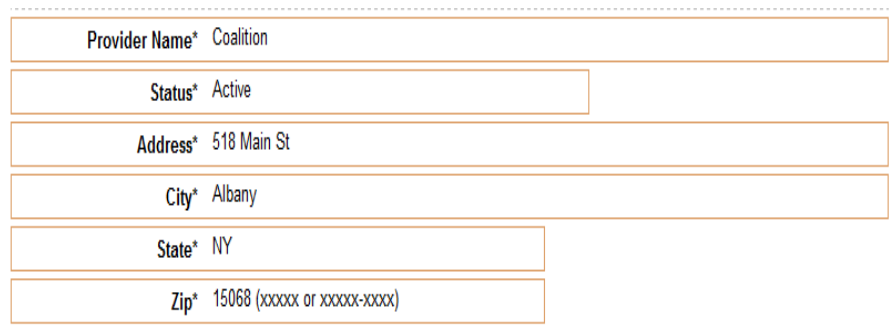
- Your login information should be provided to you by your System Administrator.

ADMINISTRATION

The Administration module is used to complete administrative tasks within the KIT Prevention Service, such as updating organization information, staff registration, and changing a password.

Describe Coalition

The Coalition module has fields that can be filled in with various pieces of information specific to your organization. The Primary Contact information will be useful to the State if there are any questions on the data that has been entered into the KIT Prevention Service.



Editing Organization Information

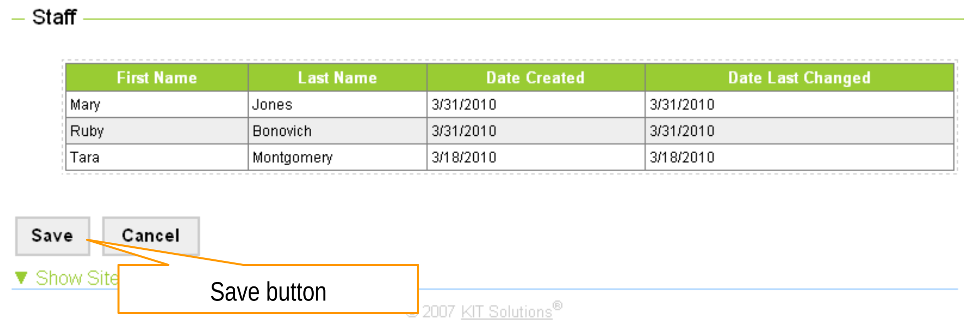
1. Click **Administration** from the Menu.
2. Click **Describe Coalition** from the Administration Landing Page.
3. Click the 

(**Edit This Record**) button.
4. The organization information will display in edit mode.

5. The **Provider Name** field will be pre-populated for you. You may modify this field if needed.

6. The **Status** is defaulted to *Active*.
   a. *Active*: your organization is currently providing services
   b. *Inactive*: your organization is no longer providing services

7. The list of registered staff members are displayed on the Organization form. When in view mode, a link entitled **Add New Staff** will be displayed. If you need to enter additional staff to the Staff list, select the **Add New Staff** link. You will be taken to the [Staff](#) module.
8. Click the Save (Save) button.
   *Note: To exit the screen without saving any changes, click the Cancel (Cancel) button.

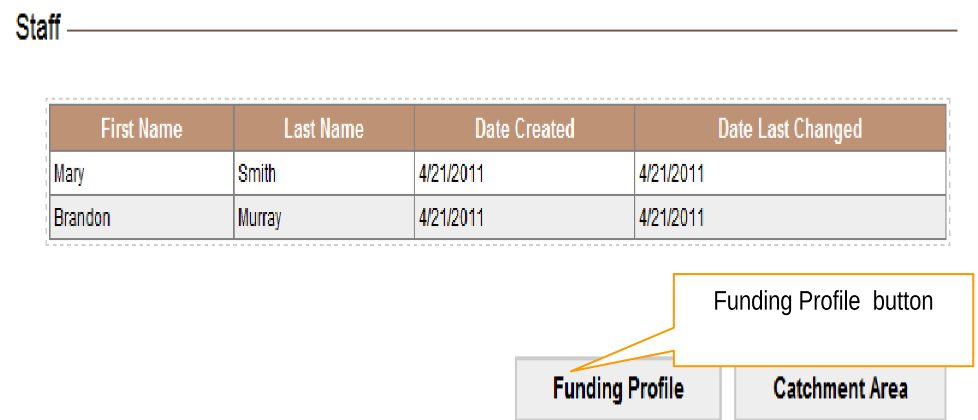


Funding Profile

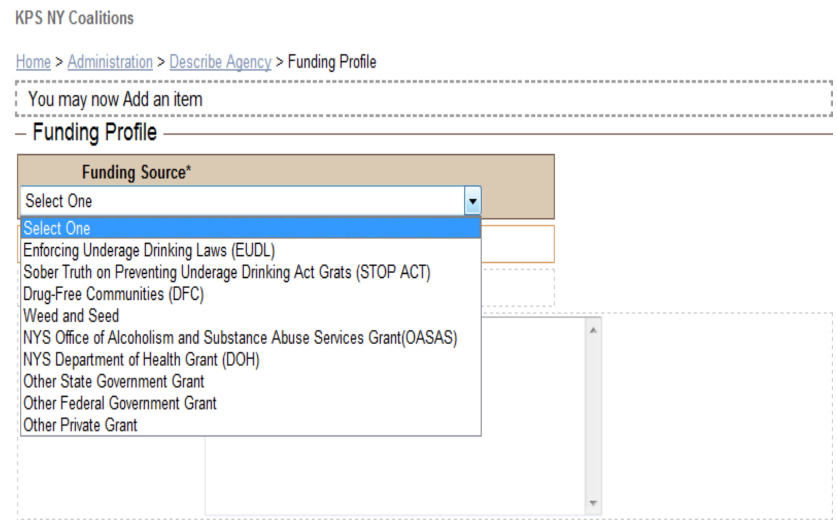
The Funding Profile is used to provide a complete picture of the funding that the coalition is receiving from any source.

Adding a Funding Source

1. Click **Administration** from the Menu.
2. Click **Describe Coalition** from the Administration Landing Page.
3. Click "**Funding Profile**" button at the bottom of the page



4. Click the “Add” button to enter a funding source
5. Fill in the required fields and save the record

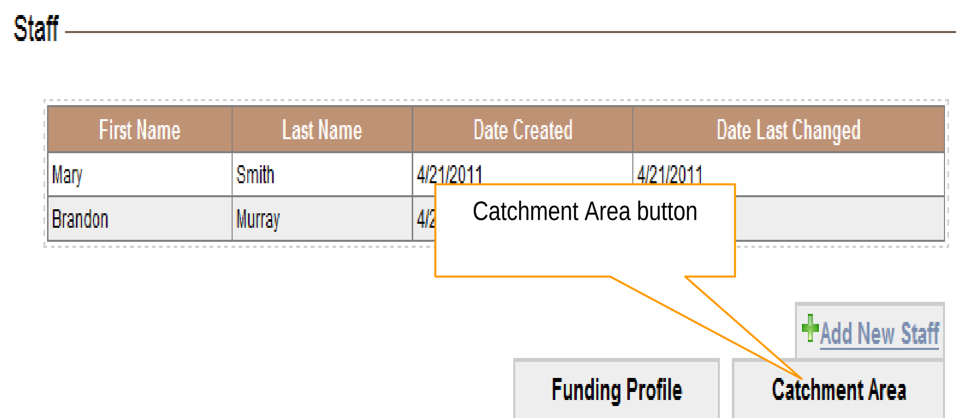


Catchment Area

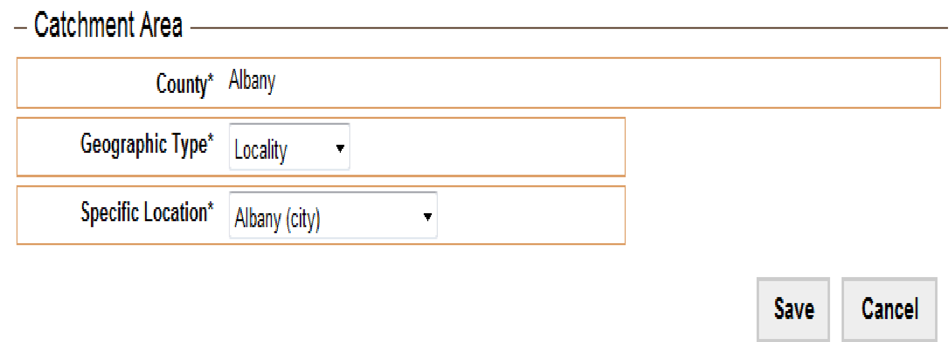
The Catchment Area is used for the coalition to specify the geographical location that they will be serving

Adding a Catchment Area

1. Click **Describe Coalition** from the Menu.
2. Click “**Catchment Area**” button at the bottom of the page



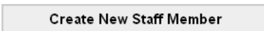
3. The County will be defaulted to the location of the coalition.
4. Choose the other data on the page to save your area.



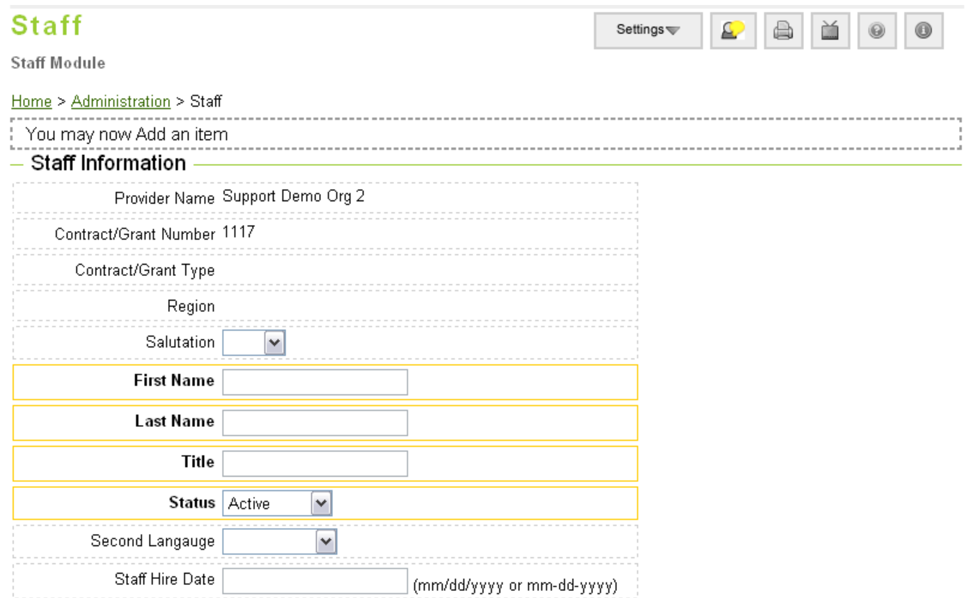
Staff

The Staff module is used to register any staff members that should have access to the data entered within the application or performing services within the community.

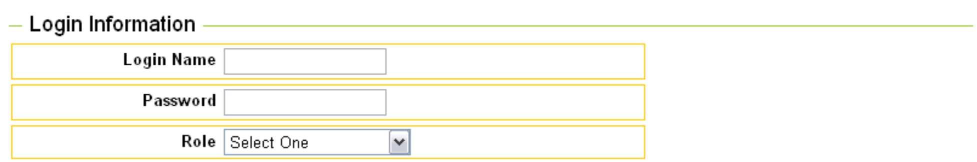
Adding a Staff Member

1. Click **Administration** from the Menu.
2. Click **Staff** from the Administration Landing Page.
3. Click the 

(**Create New Staff Member**) button.



4. Enter the details for the staff account that you are creating.

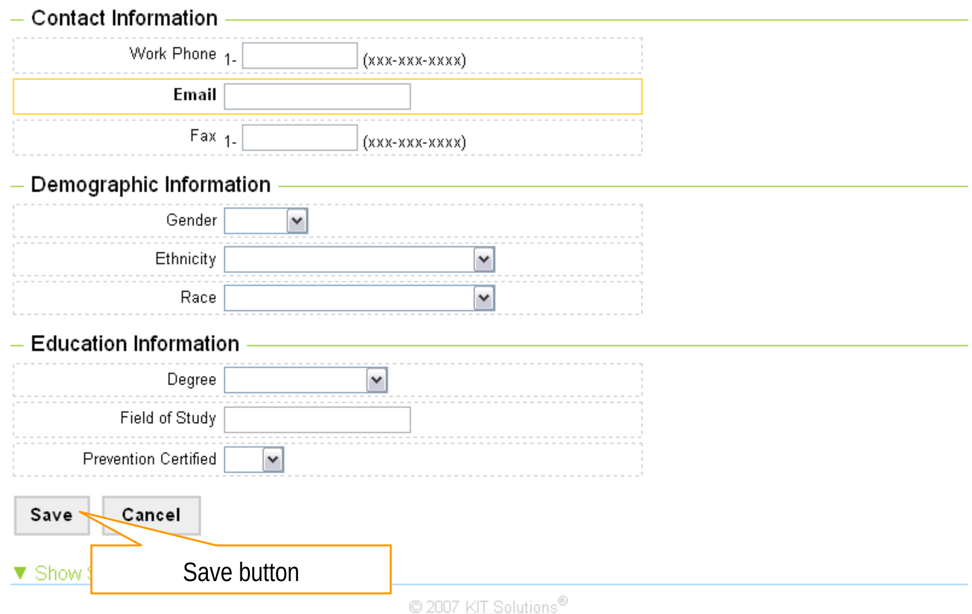


5. Enter a username for the staff member in the **Login Name** text box.
6. Enter a temporary password for the staff member in the **Password** text box. The Password can be any combination of alpha or numeric characters. This Password will be used in combination with the Login Name to log into the NY KIT Prevention Service (KPS). Once a user logs in, the password can be changed to one of their liking using the Change Password module.
7. Select the staff member's permission level from the **Role** dropdown list.

Tips

- Passwords can be any combination of letters, numbers and/or characters.
- Passwords are case sensitive.

8. Click the Save (**Save**) button.
   *__Note__: To exit the screen without saving, click the Cancel (**Cancel**) button.



Editing a Staff Member

1. Click **Administration** from the Menu.
2. Click **Staff** from the Administration Landing Page.
3. From the Staff Listing Page, click the staff member First Name link of the staff member you wish to edit.
4. Make any changes needed to the form.
5. Click the Save (**Save**) button.
   *__Note__: To exit the screen without saving any changes, click the Cancel (**Cancel**) button.

Deleting a Staff Member

1. Click **Administration** from the Menu.
2. Click **Staff** from the Administration Landing Page.
3. From the Staff Listing Page, click the staff member First Name link of the staff member you wish to delete.
4. Click the Delete (**Delete**) button at the bottom of the form.
   *__Note__: To exit the screen without deleting, click the Cancel (**Cancel**) button.
5. You will receive a message asking if you are sure you want to continue with the deletion. Click the OK (**OK**) button to continue with the deletion.
   *__Note__: Click the Cancel (**Cancel**) button to cancel the deletion.
6. You will receive a confirmation message indicating the staff member has been deleted successfully. Notice that the staff member is no longer in the list.

Tips

- When a staff member leaves your organization you will not be able to delete the staff member. In these instances, change the **Status** to ***Inactive*** to prevent the staff member from logging into the application.
- Setting the **Status** to ***Inactive*** is used to keep the staff member in the database for history purposes but removed from all of the staff lists on the Edit Forms.

Change Password

The Change Password module allows a user to change the password on the account they are currently logged in with.

1. Click **Administration** from the Menu.
2. Click **Change Password** from the Administration Landing Page.
3. Enter the current password into the **Current Password** text box.
4. Enter a password you would like to use in the **New Password** text box.
5. Retype the password in the **Confirm New Password** text box.
6. Click the (**Save**) button.
   *__Note__: To exit the screen without saving, click the (**Cancel**) button

Tips

- It is important to remember that passwords are case sensitive.
- Passwords can be any combination of letters, numbers, and/or characters.
- Passwords do not expire.

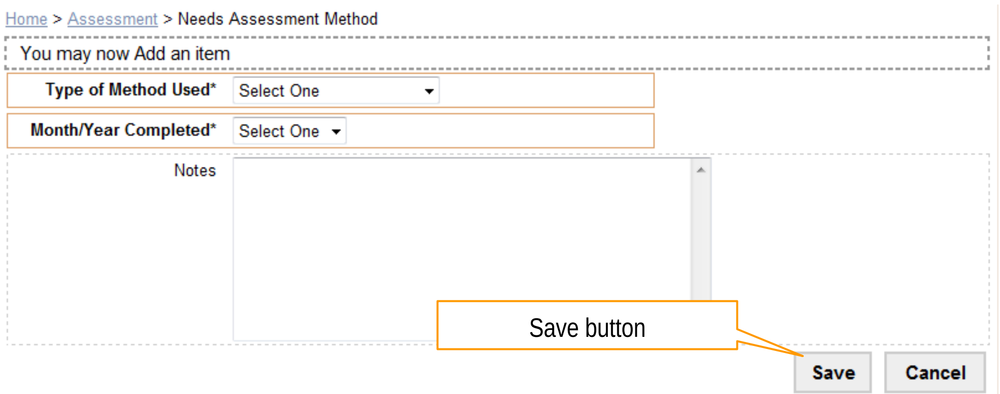
ASSESSMENT

The Assessment area is used to enter the results of the needs assessment that has been conducted by the coalition.

Needs Assessment Methods

Adding a Needs Assessment Method

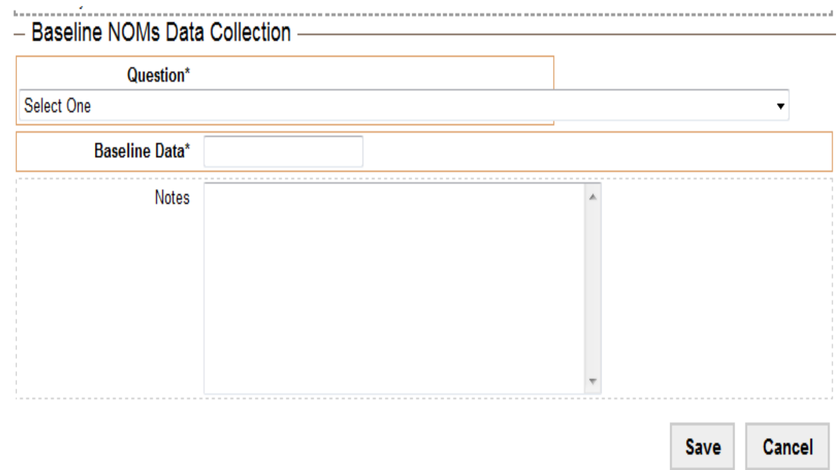
1. Click **Assessment** from the Menu.
2. Click the Needs Assessment Method Link



3. Click the "Add Assessment Method" button
4. Use the drop downs to complete the page. The Notes section is optional to provide any additional details.

   NOTE: All of the Methods that are entered in this area will be used when building your Logic Model during the Planning step.

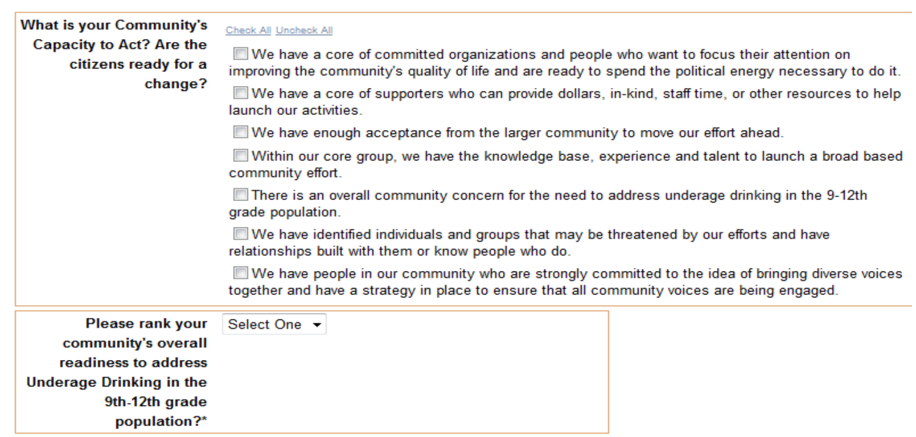
Baseline NOMs Data Collection



Adding Baseline NOMs Data

1. Click **Assessment** from the Menu.
2. Click the Baseline NOMs Data Collection Link.
3. Click “Add”
4. Use the drop downs to complete the details of the page

Community Readiness



Adding a Community Readiness Method

1. Click **Assessment** from the Menu.
2. Click the Community Readiness Link
3. Click the “Add” button
4. Complete the required fields for your methods.

Needs Assessment Results

Adding a Needs Assessment Results

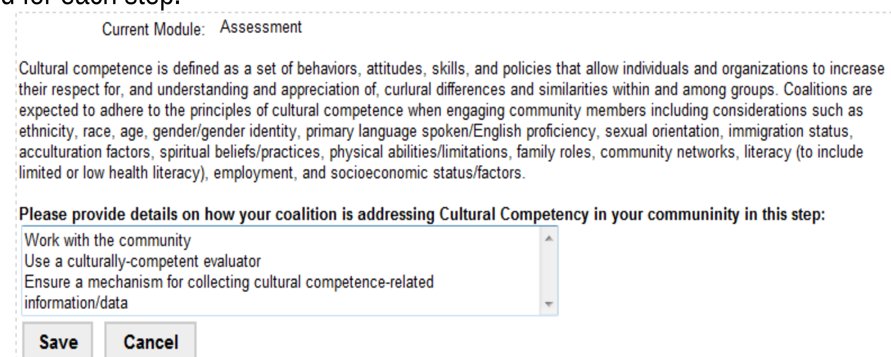
1. Click **Assessment** from the Menu.
2. Click the Needs Assessment Results Link

3. Choose whether each of the items have been identified.

   NOTE: You will not be able to complete your Planning if this screen has not been completed.

Cultural Competency

Record the Steps that the coalition is taking towards cultural competency need to be recorded for each step.



Adding Cultural Competency

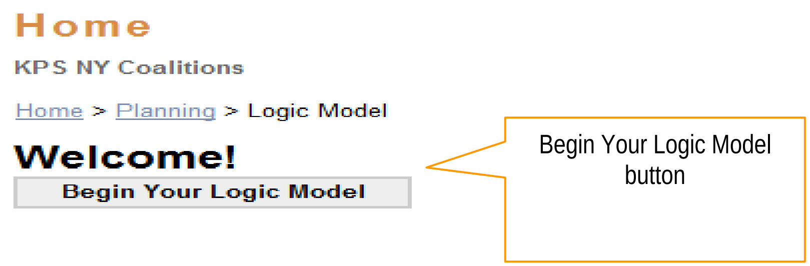
1. Click **Assessment** from the Menu.
2. Click the Cultural Competency Link.
3. Record the details on how your coalition is addressing cultural competency

NOTE: Cultural Competency will be recorded for each of the SPF Steps. What is recorded under each step should be addressing that step.

The Planning Step contains the Logic Model module which is used for describing relationships among multiple factors and components in a community, and identifies the strategies that can impact those relationships to achieve a desired outcome. This area is also used to develop your strategic plan and coalition capacity building activities.

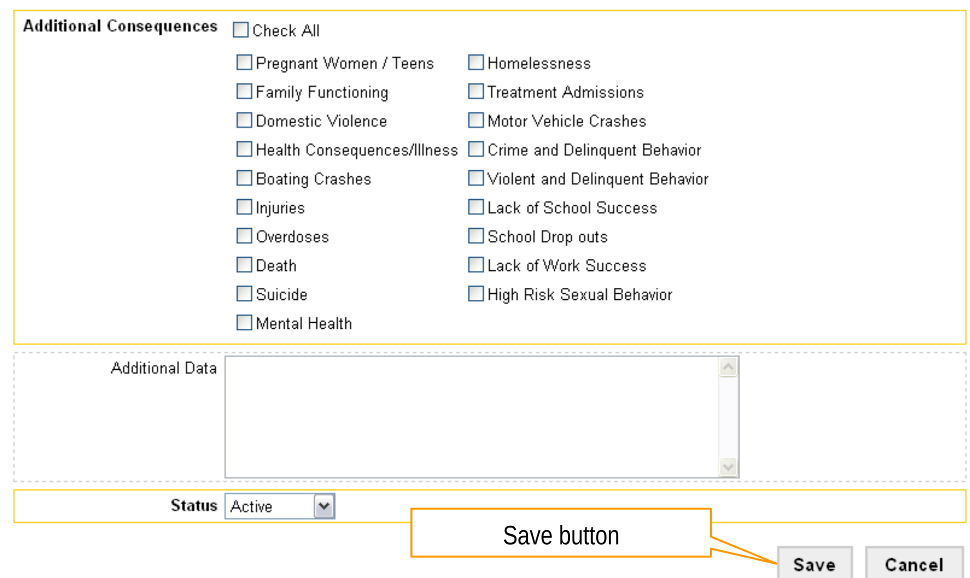
LOGIC MODEL - Substance Related Consequences

Adding a Substance Related Consequence



4. Click **Planning** from the menu
5. Click **Logic Model** from the Planning Menu.
6. Click the Begin Your Logic Model (**Begin Logic Model**) button.

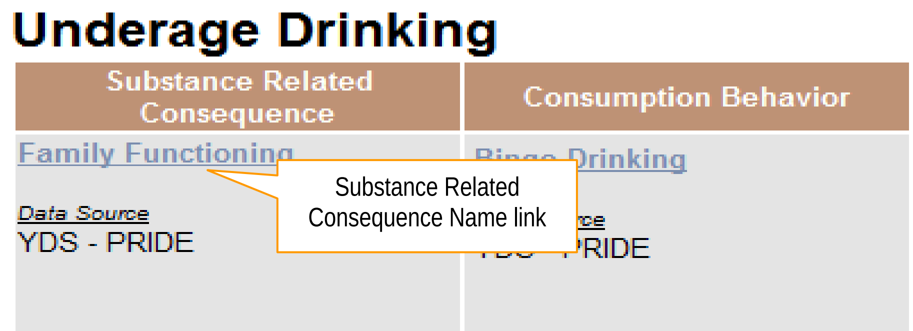
7. Identifying the priority problem from the **Priority Problem** dropdown list.
8. Select the primary substance related consequence from the **Primary Consequence** dropdown list.



9. Using the **Additional Consequences** checkboxes, select any other substance related consequences you wish to identify.
   *Note: Depending on the Primary Consequence selected, the Additional Consequences options may change.
10. Enter your problem statement
11. Choose the data source/sources that determined that support your selections. These Data Sources are pre-populated from what was entered in the Needs Assessment Methods in the Assessment step.
12. Choose the demographics that reflect the target population for this consequence
13. The **Status** is defaulted to *Active*.
    1. *Active*: the substance related consequence is currently in use.
    2. *Inactive*: the substance related consequence is no longer in use.
14. Click the Save (**Save**) button.
    *Note: To exit the screen without saving, click the Cancel (**Cancel**) button.

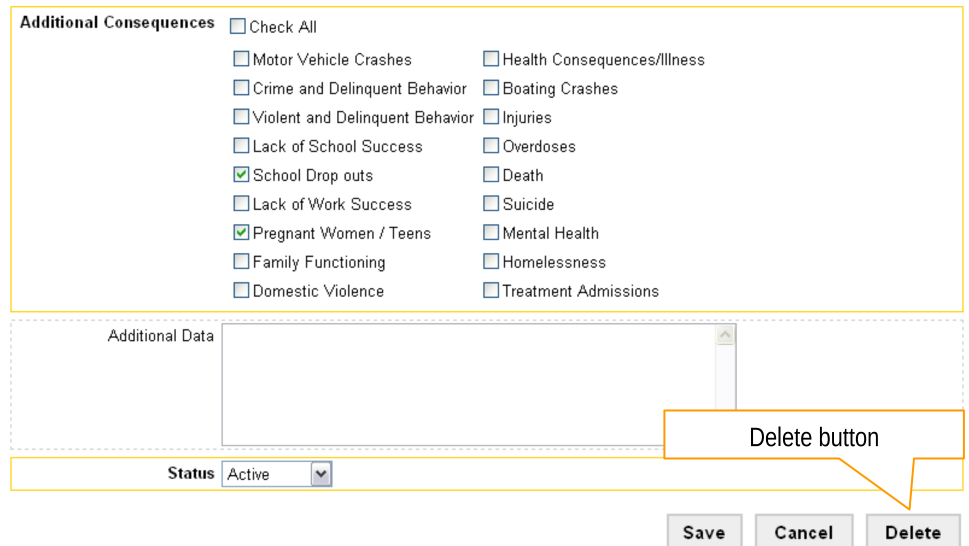
Editing a Substance Related Consequence

1. Click **Planning** from the Menu
2. Click **Logic Model** from the Planning Menu.
3. From the Logic Model Listing Page, click the Substance Related Consequence Name link of the consequence you wish to edit.
4. Make any changes needed to the form.
5. Click the Save (**Save**) button.
   *Note: To exit the screen without saving any changes, click the Cancel (**Cancel**) button.



Deleting a Substance Related Consequence

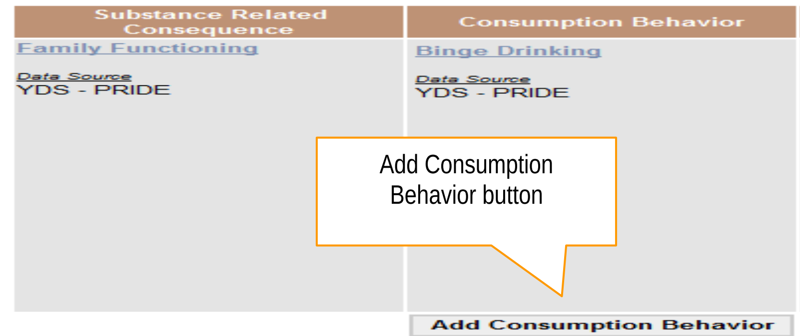
1. Click **Planning** from the Menu
2. Click **Logic Model** from the Planning Menu.
3. From the Logic Model Listing Page, click the Substance Related Consequence Name link of the consequence you wish to delete.
4. Click the Delete (**Delete**) button at the bottom of the form.
   *Note: To exit the screen without deleting, click the Cancel (**Cancel**) button.
5. You will receive a message asking if you are sure you want to continue with the deletion. Click the OK (OK) button to continue with the deletion.
   *Note: Click the Cancel (**Cancel**) button to cancel the deletion.



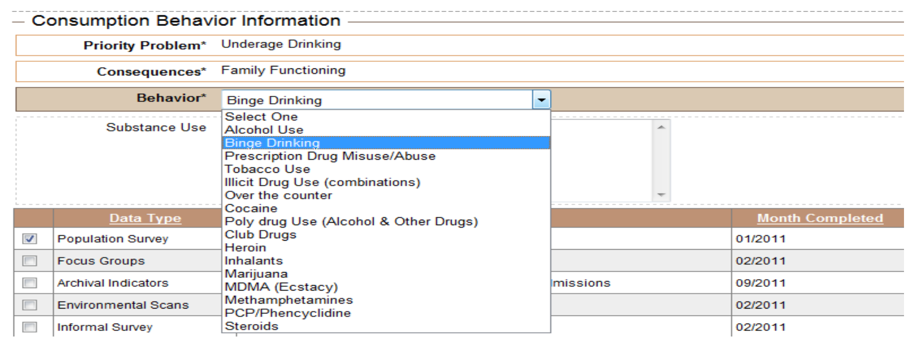
LOGIC MODEL - Consumption Behavior

Adding a Consumption Behavior

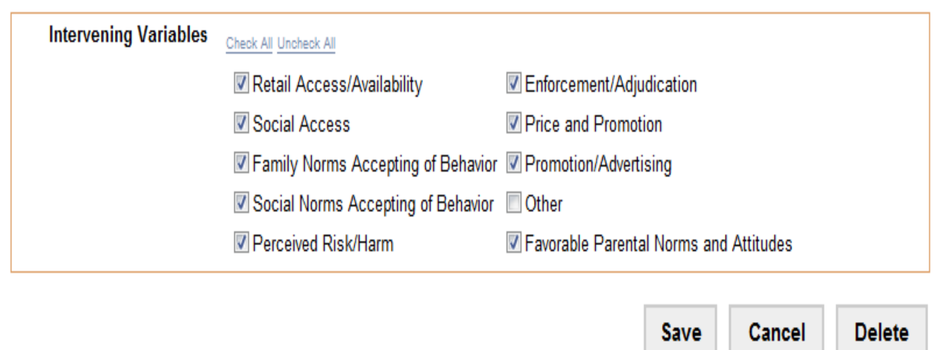
1. Click **Planning** from the Menu
2. Click **Logic Model** from the Planning Menu.
3. Click the **Add Consumption Behavior** button.



4. The **Priority Problem and Consequences** are prepopulated for you.
5. Select the substance abuse behavior from the **Behavior** dropdown list.
6. Enter any additional notes regarding the substance abuse behavior in the **Substance Abuse** text box, if desired.
7. Choose the data sources that determined that support your selections. These Data Sources are pre-populated from what was entered in the Needs Assessment Methods in the Assessment step.
8. Select the demographic profile that is associated with this behavior
9. The **Status** is defaulted to *__Active__*.
   a. *__Active__*: substance abuse behavior is currently in use.
   b. *__Inactive__*: substance abuse behavior is no longer is use.

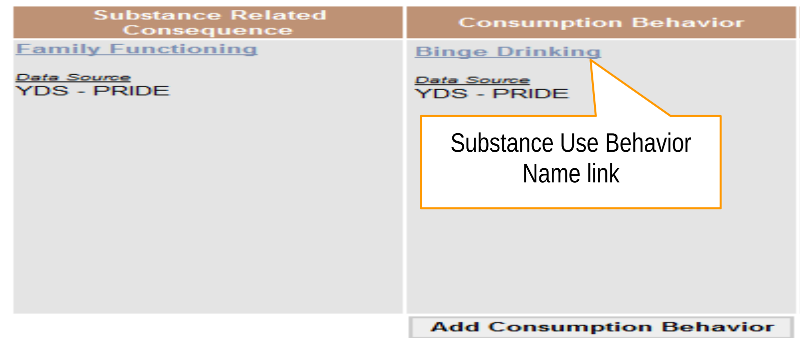


10. Using the **Intervening Variables** checkboxes, select the intervening variables which are contributing to the priority problem.
    a. If *__Other__* is selected, you will be asked to specify what that intervening variable is using the text box
11. Click the Save (**Save**) button.
    *__Note__: To exit the screen without saving, click the Cancel (**Cancel**) button.



Editing a Consumption Behavior

1. Click **Planning** from the Menu
2. Click **Logic Model** from the Planning Menu.
3. From the Logic Model Listing Page, click the Substance Use Behavior Name link of the behavior you wish to edit.
4. Make any changes needed to the form.
5. Click the Save (**Save**) button.
   *Note: To exit the screen without saving any changes, click the Cancel (**Cancel**) button.



Deleting a Consumption Behavior

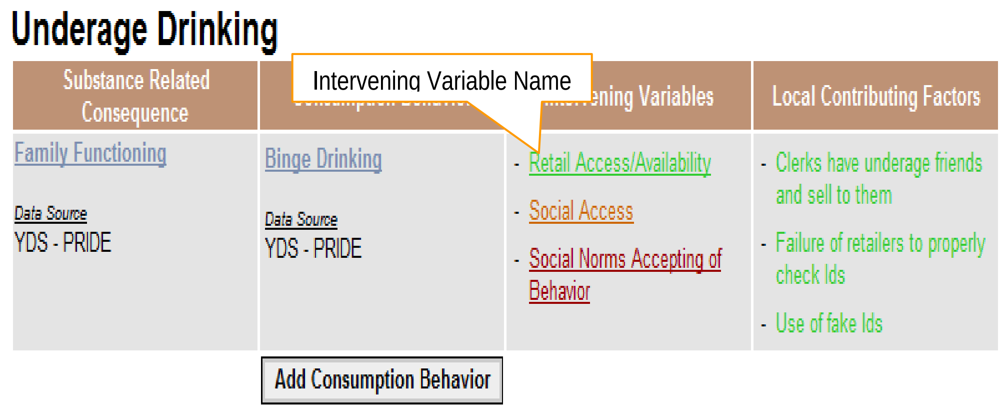
1. Click **Logic Model** from the Menu.
2. From the Logic Model Listing Page, click the Substance Use Behavior Name link of the behavior you wish to delete.
3. Click the Delete (**Delete**) button at the bottom of the form.
   *Note: To exit the screen without deleting, click the Cancel (**Cancel**) button.
4. You will receive a message asking if you are sure you want to continue with the deletion. Click the OK (OK) button to continue with the deletion.
   *Note: Click the Cancel (**Cancel**) button to cancel the deletion.

LOGIC MODEL - Intervening Variables and Local Contributing Factors

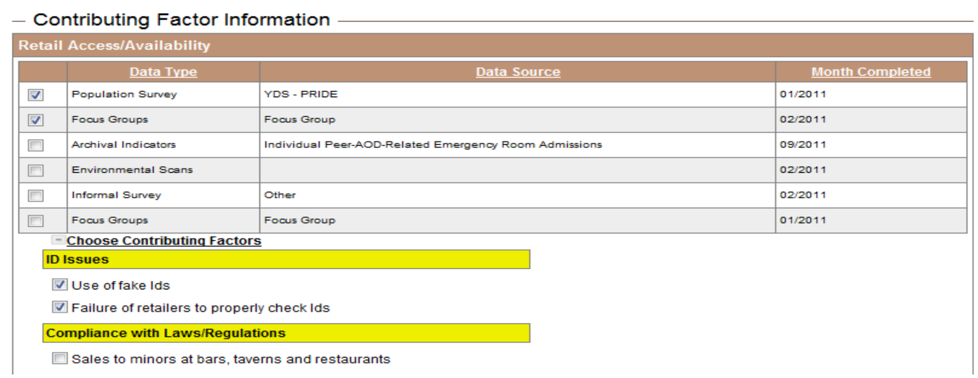
The Intervening Variables are populated based on the items that are selected for each behavior. Each Intervening Variable will be color coded to match with the Local Contributing Factors that are selected.

Adding a Local Contributing Factors

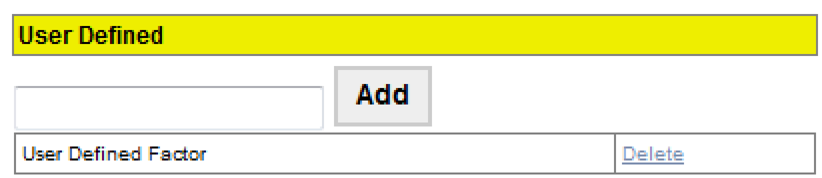
1. Click **Planning** from the Menu
2. Click **Logic Model** from the Planning Menu.
3. Click the Intervening Variable that you would like to add Local Contributing Factors to.



4. Choose the data sources that determined that support your selections. These Data Sources are pre-populated from what was entered in the Needs Assessment Methods in the Assessment step.
5. Choose the Contributing Factors that are associated with the selected Intervening Variable.



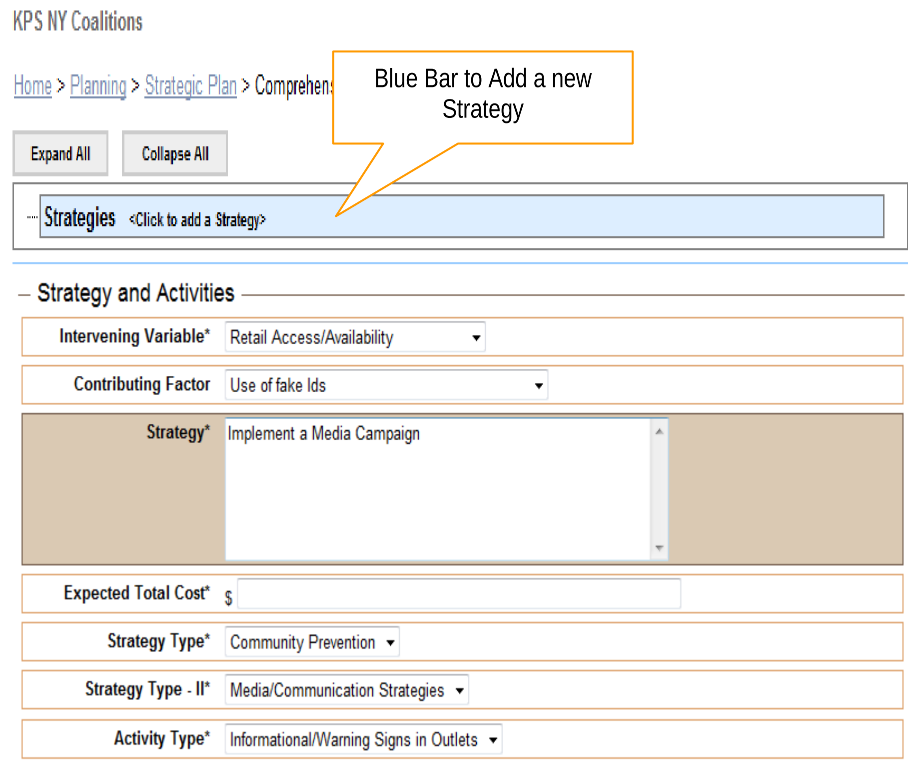
6. You may choose to enter a **User Defined** contributing factor. You will type in your contributing factor and click the "**Add**" button. To add another **User Defined** contributing factor, type in the factor and click Add again.
7. Click the Save (**Save**) button.
   *Note: To exit the screen without saving, click the Cancel (**Cancel**) button.



Strategic Plan

Adding a Strategy and Activity

1. Click **Planning** from the Menu.
2. Click the **Strategic Plan** link

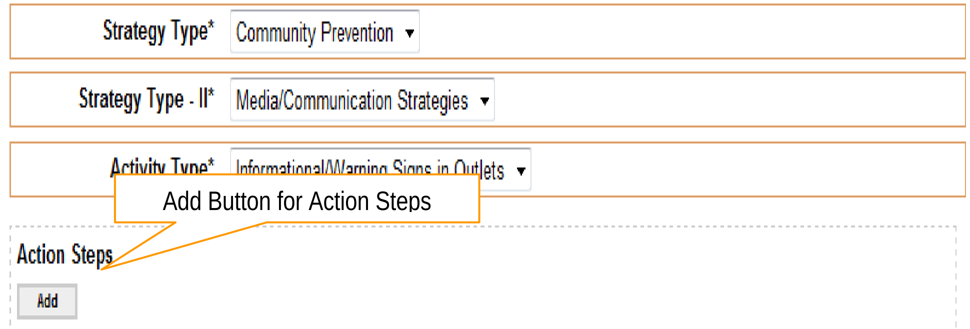


3. Click the blue bar that is labeled **Strategies** to add a new strategy.
4. Choose an appropriate Intervening Variable and Contributing Factor combination that this Strategy will be targeting

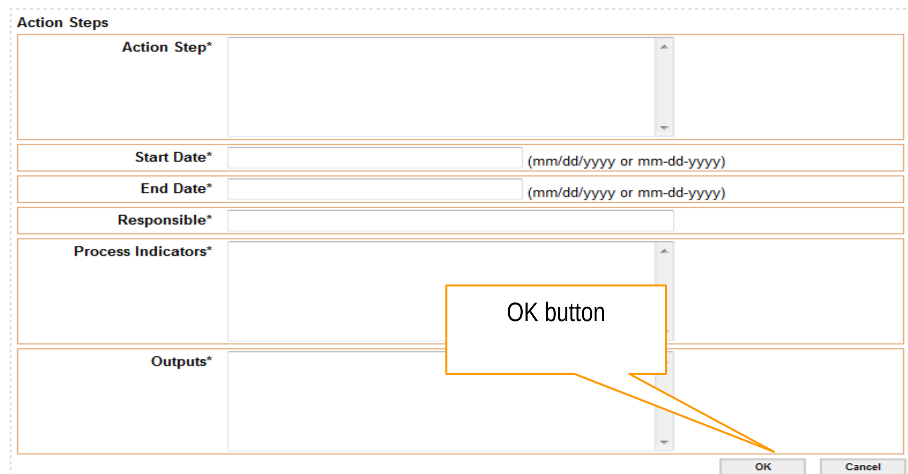
   NOTE: Only those Intervening Variables and Contributing Factors that were added in the Logic Model will be available for selection.
5. Enter the details of the Strategy that will be implemented
6. Enter the Expected Total Cost
7. Choose the Strategy Type – Community Prevention is the only option at this time.
8. Choose the Strategy Type II – Media, Policy, or Enforcement
9. Depending on the Strategy Type II – you may need to choose a Strategy Type III to further narrow down the category of implementation
10. Choose the Activity Type that will be implemented

Action Steps

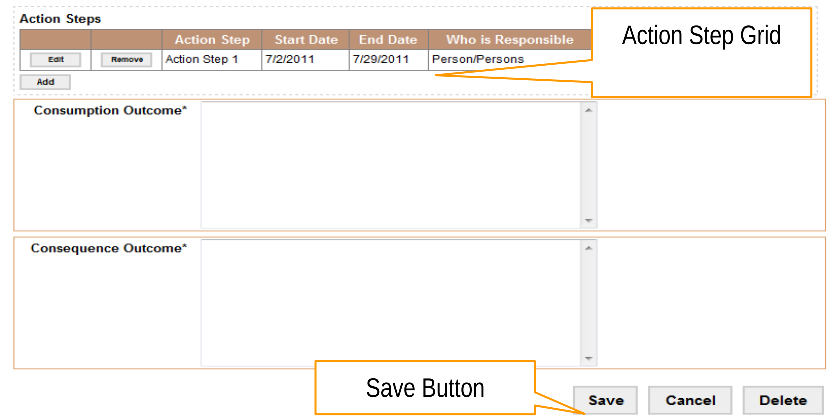
1. Click the **Add** button to begin to add Action Steps
2. Enter the details of your Action Step



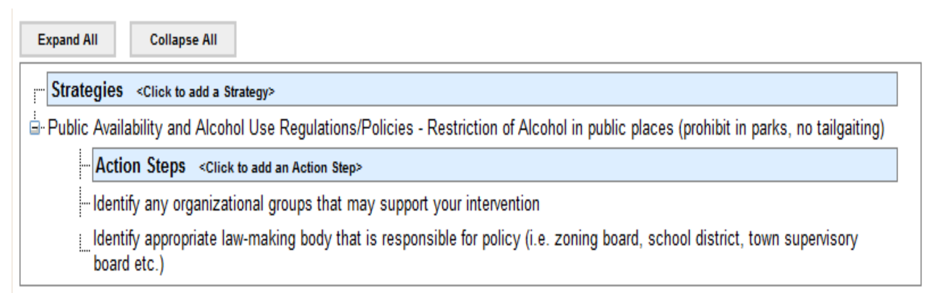
3. Choose a Start and End Date
4. Enter the person/persons responsible for completing the action step
5. Enter the process indicators to show that progress is being made
6. Enter the final desired Outputs of the action step
7. Click **OK** to add the Action Step
8. This will add the Action Step to the **"Action Steps Grid."** Repeat Steps 1 through 7 to add additional steps.



Adding Outcomes



9. Enter the Consumption Outcome that is being targeted with the strategy and Activity
10. Enter the Consequence Outcome that is being targeted with the strategy and Activity

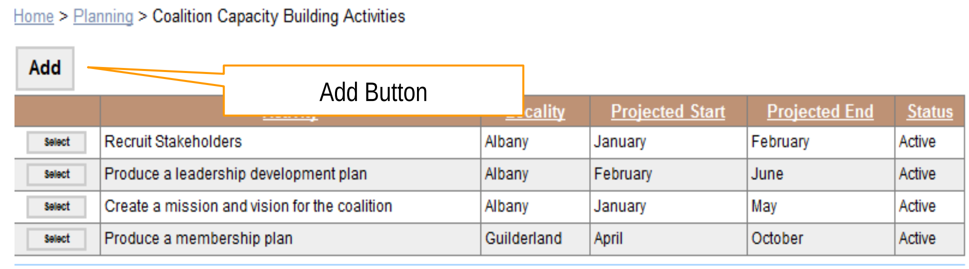


11. Click the Save (Save) button.
    *Note: To exit the screen without saving, click the Cancel (Cancel) button.

Upon Clicking Save, you will be returned to the main landing page for the Strategic Plan, It will be populated with the Strategy and Action Steps that were added.

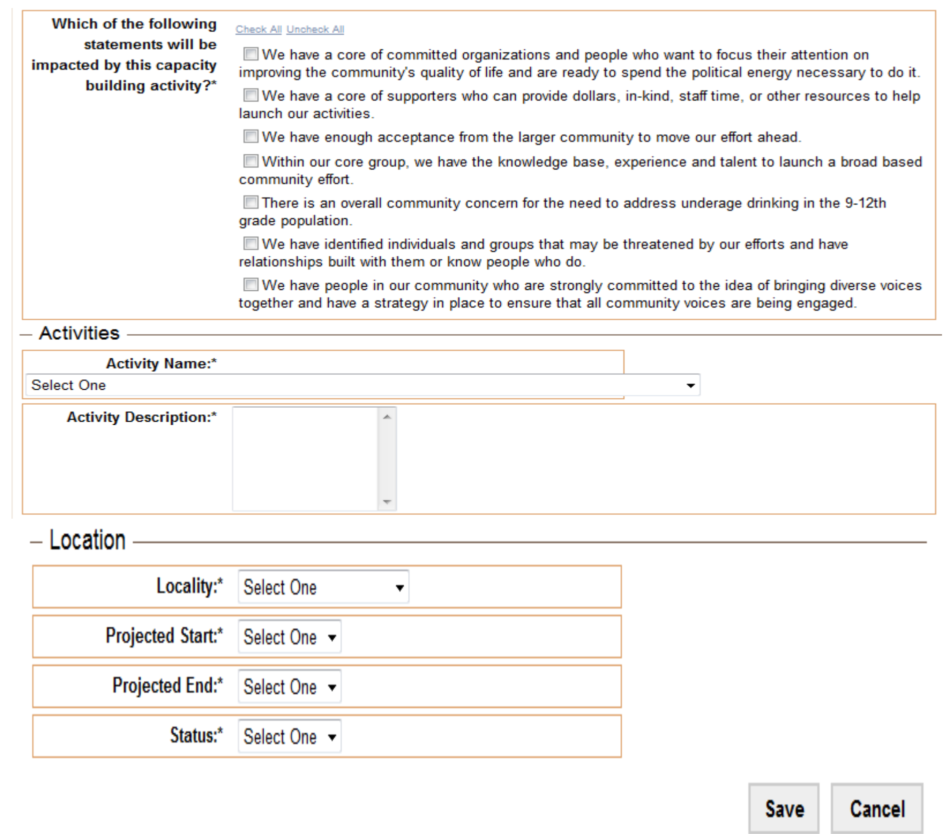
Coalition Capacity Building Activities

This module allows you to enter activities that will be conducted to help build your coalition capacity. These are not directly related to a strategy.



Adding a Coalition Capacity Building Activity

1. Click **Planning** from the Menu.
2. Click the **Coalition Capacity Building Activities** link
3. Click the **Add** button



4. Choose any of the Capacity Building Statements that may be impacted by this activity
5. Choose an Activity Name
6. Enter a Description of the activity
7. Choose the locality in which the activity will take place
8. Enter a Projected Start/End Date
9. Click the Save (**Save**) button.

***Note**: To exit the screen without saving, click the Cancel (**Cancel**) button.

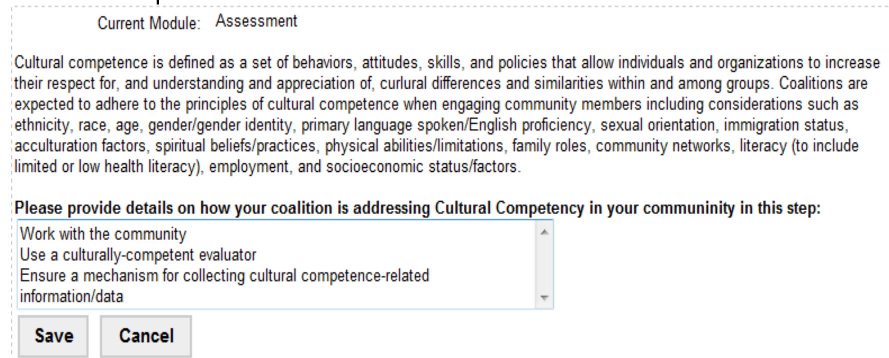
Cultural Competency

Record the Steps that the coalition is taking towards cultural competency need to be recorded for each step.

Adding Cultural Competency

1. Click **Planning** from the Menu.
2. Click the Cultural Competency Link.
3. Record the details on how your coalition is addressing cultural competency

NOTE: Cultural Competency will be recorded for each of the SPF Steps. What is recorded under each step should be addressing that step.

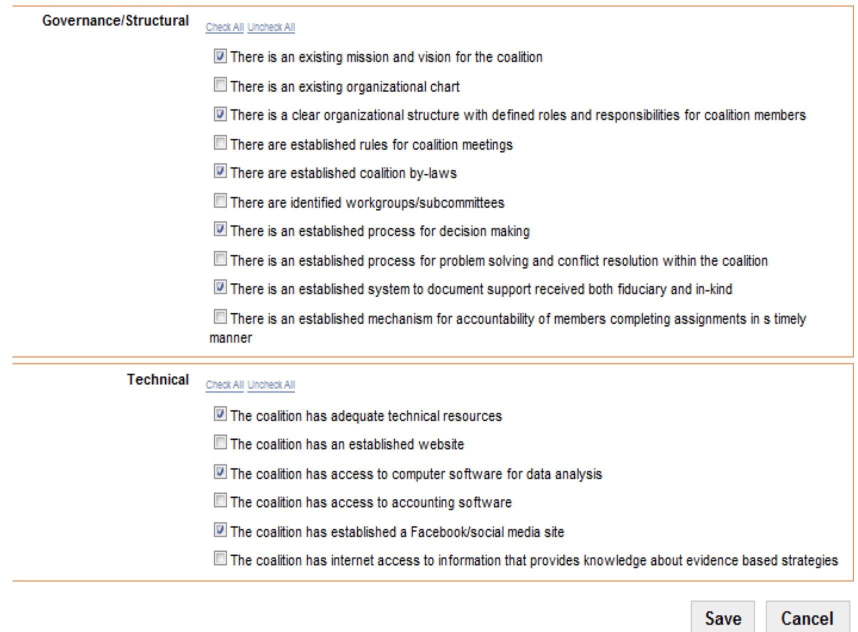


NOTE: This is an example screenshot from the Assessment area.

CAPACITY

The Capacity module is used to record the current capacity of the coalition as well as the ongoing activities of the coalition.

Internal Resources



Adding an Internal Resource

1. Click Capacity from the menu
2. Click **Internal Resources** from the Capacity Menu
3. Select the appropriate internal resources that are currently a part of the coalition
4. Click the Save (**Save**) button.
   *Note: To exit the screen without saving, click the Cancel (**Cancel**) button.

External Resources

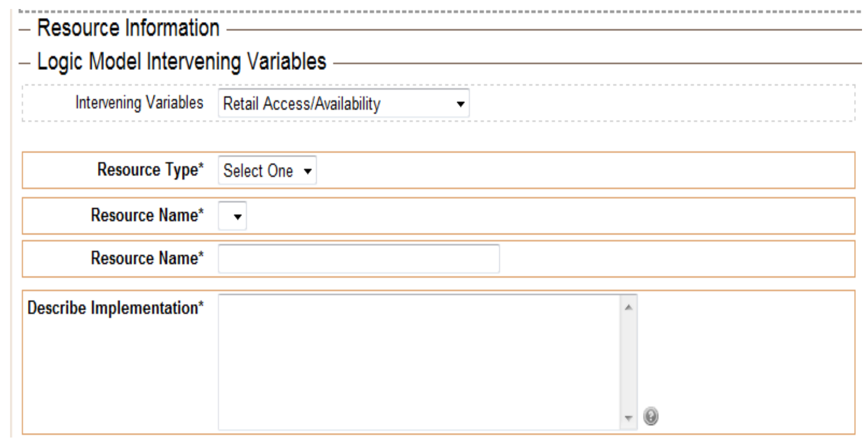
Identify programs, policies and strategies existing in your community which address the Intervening Variables identified in your Needs Assessment.

Adding External Resources

1. Click Capacity from the menu\
2. Click **External Resources** from the Capacity Menu
3. Click **Add to Inventory** to start to build the external resource inventory
4. Choose an appropriate Intervening Variable that this External Resource will be addressing

NOTE: Only those Intervening Variables that were added in the Logic Model will be available for selection.

5. Choose a Resource Type and Name and provide a description of the implementation
6. Enter any details concerning any gaps that may exist with this resource.
7. Enter an estimate of how many are served or impacted by this resource
8. Choose the type of organization that is implementing the resource and the name of that organization
9. Select the demographics that are targeted by the resource
10. Choose any documentation that provides information on the effectiveness of the resource
11. Enter any training or expertise that is required to continue this resource
12. Enter any funding information that is known concerning the resource
13. Click the Save (**Save**) button.
    *Note: To exit the screen without saving, click the Cancel (**Cancel**) button.

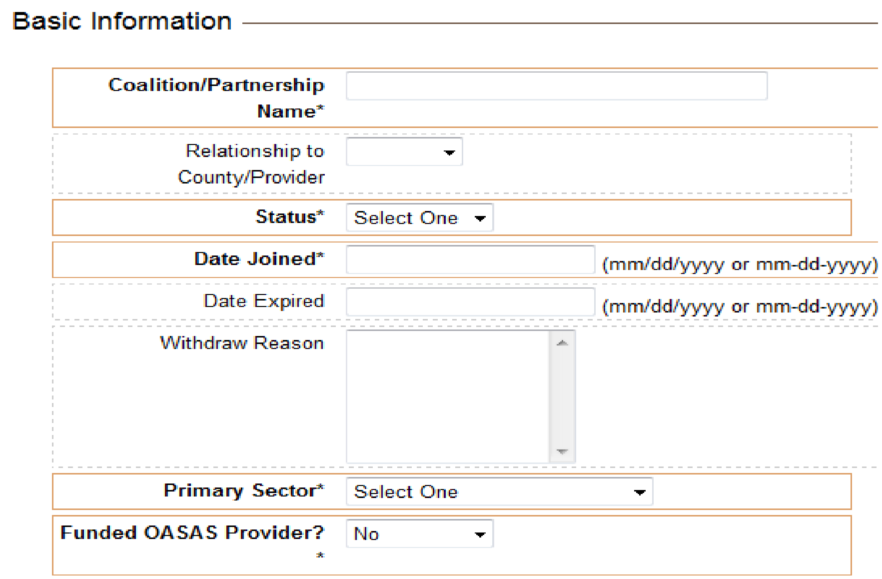


Coalition Partners

Register information about the organizations that the coalition is working with in the 12 sectors

Adding a Coalition Partners

1. Click **Capacity** from the Menu.
2. Click **Coalition Partners** from the Capacity menu
3. Click **Create New Coalition Organization** button
4. Populate all required fields for the partnering organization
5. If it is a Funded OASAS provider – you will be prompted to choose an official OASAS name.
6. Click the Save (**Save**) button.
   *Note: To exit the screen without saving, click the Cancel (**Cancel**) button.

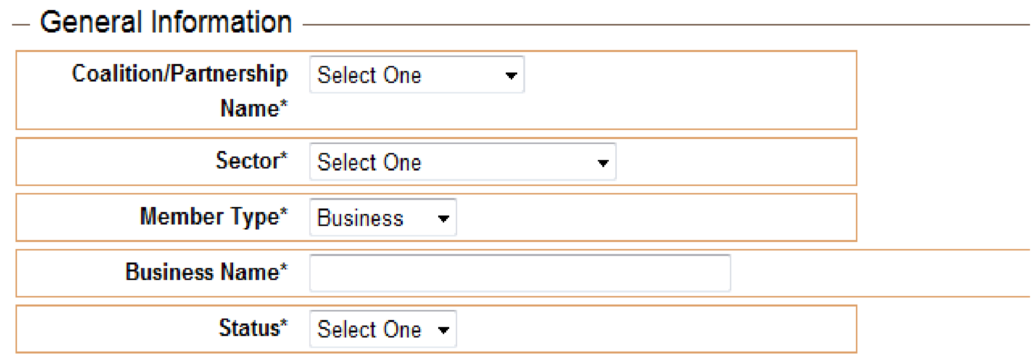


Coalition Member

Add members of your coalition

Adding a Coalition Member

1. Click **Capacity** from the Menu.
2. Click **Coalition Members** from the Capacity menu
3. Click **Create New Coalition Member** button
4. Populate all required fields for the coalition member
5. Click the Save (**Save**) button.
   *Note: To exit the screen without saving, click the Cancel (**Cancel**) button.

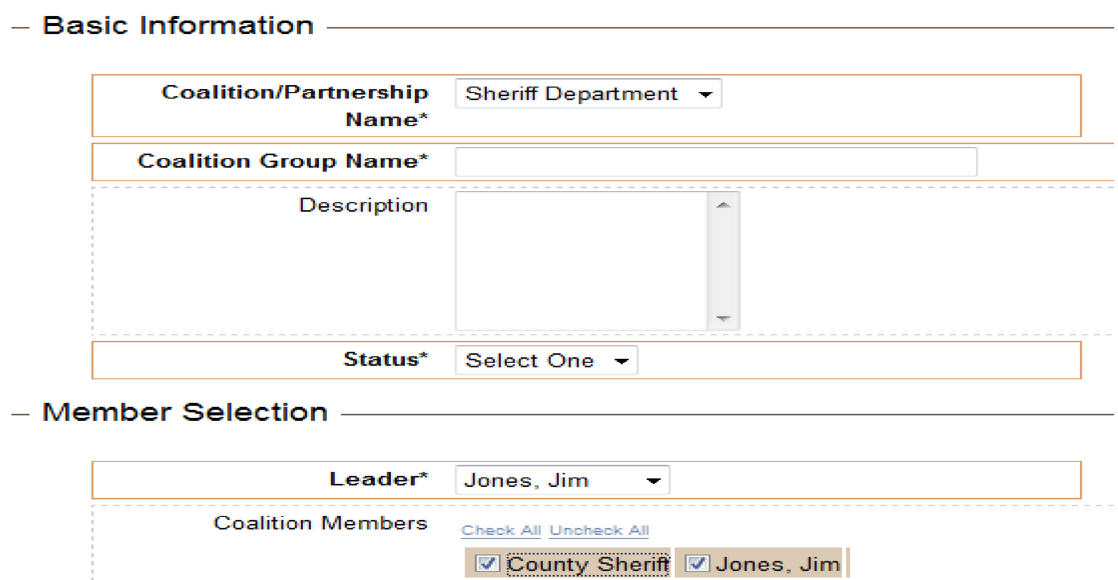


Coalition Group

Coalition task force, subcommittee, and group registration

Adding a Coalition Group

1. Click **Capacity** from the Menu.
2. Click **Coalition Group** from the Capacity menu
3. Click **Create New Coalition Group** button
4. Populate the required fields for the group name and members of the group
5. Click the Save (**Save**) button.
   *Note: To exit the screen without saving, click the Cancel (**Cancel**) button.

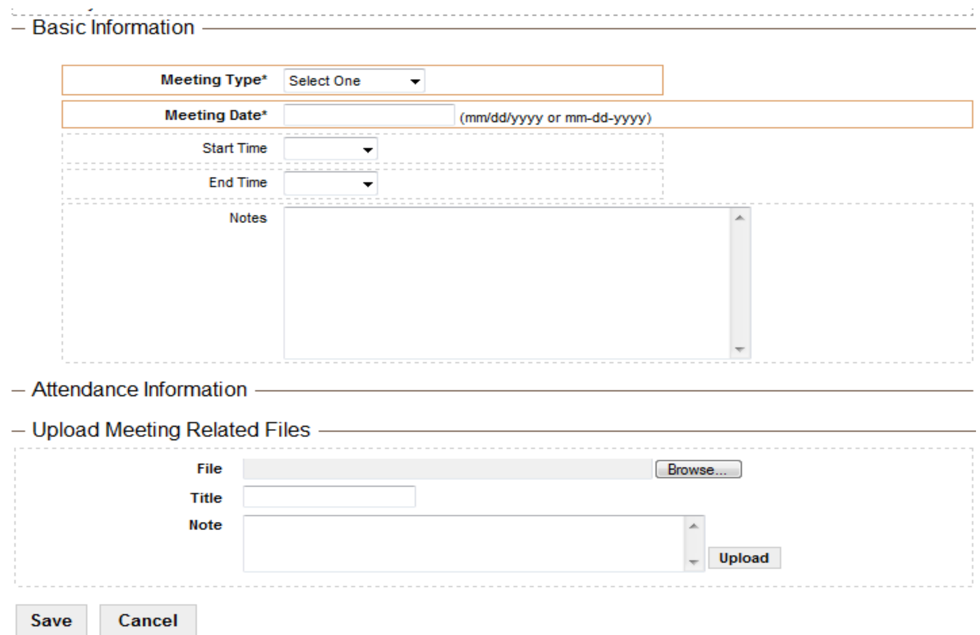


Coalition Meeting

Tracking of coalition meetings including who attended the meetings as well as the option to upload agenda and minutes

Adding a Coalition Meeting

1. Click **Capacity** from the Menu.
2. Click **Coalition Meeting** from the Capacity menu
3. Click **Create New Coalition Meeting** button
4. Select a meeting type and choose the meeting date
5. You can utilize the Upload Meeting Files to upload any files (meetings, agenda, etc.) that you would like to associate with this meeting.
6. Click the Save (**Save**) button.
   *Note: To exit the screen without saving, click the Cancel (**Cancel**) button.



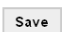
Training and Technical Assistance (TTA)

The coalition may request Training and Technical assistance from their assigned PRC through the TTA module.

Adding a Request for TTA

1. Click **Capacity** from the Menu.
2. Click **Training and Technical Assistance** (**TTA**) from the Capacity menu
3. Click the **Add** button
4. Choose a topic for the TTA session
5. Enter a date that this TTA is needed by
6. Status should remain **Training Needed**

NOTE: The Status of Training Needed indicates to the PRC that this training has not been received and is being requested. It will be changed by the PRC after training is provided. If you no longer need TTA, you can update the request to "Canceled" to reflect this change.

7. Click the 

(**Save**) button.
*****Note**: To exit the screen without saving, click the

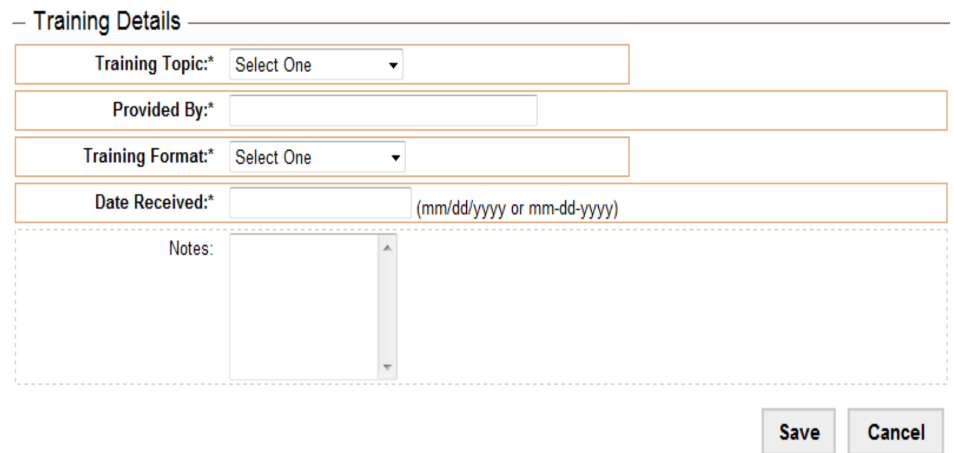
(**Cancel**) button.

Training Log

Log trainings and assistance that the coalition receives that are not provided by the PRC.

Adding a Training Log

1. Click **Capacity** from the Menu.
2. Click **Training Log** from the Capacity menu
3. Click the **Add** button
4. Choose a topic for the training session
5. Enter who provided the training
6. Choose the date the training was received
7. Click the Save (**Save**) button.
   *Note: To exit the screen without saving, click the Cancel (**Cancel**) button.



Cultural Competency

Record the Steps that the coalition is taking towards cultural competency need to be recorded for each step.

Adding Cultural Competency

1. Click **Capacity** from the Menu.
2. Click the Cultural Competency Link.
3. Record the details on how your coalition is addressing cultural competency

NOTE: **Cultural Competency will be recorded for each of the SPF Steps. What is recorded under each step should be addressing that step.**