Washington State
Department of Social & Health Services
DASA Division of Alcohol & Substance Abuse

Performance Based Prevention System (PBPS)

User Manual – Part I

October 2008
Edition 1.1

http://www.kithost.net/wa

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Getting Started

Introduction

Welcome to Washington State's Performance Based Prevention System (PBPS) brought to you by Washington State's Department of Social Health Services (DSHS) Division of Alcohol and Substance Abuse (DASA) in cooperation with Kit Solutions, Inc©. The PBPS was developed to be responsive to DSHS, legislative, and public inquires regarding those who are participating in publicly funded prevention activities. PBPS also provides information to DASA and its providers regarding the effectiveness of programs in preventing alcohol, tobacco, and other drug misuse and abuse across the State of Washington. The PBPS provides automated reporting and service tracking for contract accountability and monitoring. The team that developed the PBPS with KIT Solutions, Inc©, was comprised of DASA Prevention and MIS section employees, including DASA's Regional Prevention Managers. The more data that we collect now, the better situation we will be in the future when we request increased funding for our programs and services.

You, as a user, play an integral role in this process. DASA continues to update the PBPS so that it may become second nature to you and not detract from your hands-on prevention duties. We encourage program enhancing suggestions and will work diligently to see that requests are considered, honored, and implemented into the system.

As you may already know, DASA's Regional Prevention Managers (RPMs) are your direct connection to questions about the PBPS. Please inform them of any suggestions or difficulties that you may have.

PBPS Basics

The PBPS is a web-based system that requires an internet connection to access. As a result, the apparent performance (speed) of the system may be slow due to your internet connection. The faster the connection (high speed), the faster PBPS will be; the slower the connection (dialup modem) the slower PBPS will be. Please take this into consideration and we appreciate your patience.

Access to the PBPS

The PBPS is located at: www.kithost.net/wa

Your User ID, Password, and Organization ID will be given to you by your organization's administrator. Please retain this information and do not share it with others.

Recommended Computer Settings

Screen Resolution 1024 x 768 pixels or larger

If your screen resolution is smaller (ex: 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 & down and left & right to access all the data fields.

Web Browser Microsoft Internet Explorer (IE)

Currently Mozilla Firefox, Netscape, AOL, MSN and other browsers are not supported by PBPS. They may function, but not to design specifications. We recommend users have the latest version of IE installed on their computer along with the updates provided by Microsoft (which are released periodically).

Also, IE needs to be configured to allow “cookies”. If do not know how to check for this, contact your PC technician for assistance.

Pop-Up Blockers Disabled (or configured for exceptions)

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

Navigating in PBPS

Entering data into PBPS can be made easier by using the “**Tab**” key on the keyboard. The tab key advances the cursor to the next data field. You can also go from the current field to the previous field by holding “**Shift**” and pressing “**Tab**” (**Shift+Tab**). You can also navigate through the fields by using the mouse.

To select multiple data items at one time, hold the control (Ctrl) key and left click the mouse.

Basic Layout

Once you get into the PBPS most of the screens have the same format. They all have a Menu bar across the top. The Sub-Menu is only displayed once an item in the Menu has been selected (clicked).

*Note: sometimes when you select a different menu tab the entire screen does not refresh, however, the Sub-Menu always does.

Some Task Pane Options

Search Find a particular record[i] (entry) based on search criteria that you determine with aims of a particular result (ex: Service. Program. Staff member, etc.)

Add	Creates a (blank) new record of the displayed type in the Menu and Sub-Menu. This new record is immediately ready for modification.
Edit	Unlocks the currently displayed form for editing.
Cancel	Appears after 'Edit' or 'Add' is selected. Aborts changes (including additions or modifications) made to the displayed form.
Save	Commits changes made to the displayed form.
Delete	Removes the record(s) (or all the data on displayed forms).
Print	A pop-up window opens with the current form displayed, gives you a choice of to what format (PDF, Excel, Word) you would like to export it and displays in that format in the appropriate application. If you want to print it, then you also must tell the program 'ctrl+p', File->Print, or (button).
Help	Displays a pop-up with an online version of the PBPS User Manual.

i: A record is a technical term for the set of collected data organized or grouped around particular theme.

*Example: a program record, staff record, participant record

Data Fields & Buttons

In the PBPS there are several fields, boxes and buttons that are used to collect and store data.

Type	**Preview / Description**
Text Field (aka 'Text Box)	(fill in the blank)
Drop Down Menu (aka Pull Down Menu)	(select one)
Buttons	<< > < >> Λ V
Radio Button	Selected Not selected
Check Boxes	Selected Not Selected
Red*	Red bold text with asterisk denotes a required field
Black	Black text denotes a suggested but optional field
Spell Check	

It does not matter in which order that you populate the above fields, but if a required field is not populated and you try to save the form, you will receive a message that informs you of the field vacant of data and will not be able to move to a different form until that field has data.

Three Levels of Organization Accounts

Within the PBPS, there are three types of Organization Accounts: State, County/Tribe, and Service Provider (Subcontractor). Each of these Organization Accounts has different functions and abilities. There may be items in this manual that do not specifically apply to your organization.

Connecting to the System

The PBPS is split into a Demo and a Live Site. The Demo Site should be used to train new users and to experiment with data and input. The client data from the Live Site is not available in the demo site.

Demo Site	http://demo.kithost.net/wa2003demo/pLogin.aspx
Live Site	www.kithost.net/wa

*Note: Since we are currently preparing for the next biennium and the two biennium's data are handled separately. Choose the biennium that is appropriate for your usage.

After choosing a particular biennium, please type the appropriate information in the following fields:

*Note: Your User ID, Password and Organization ID will be given to you by your organization's administrator. Please retain this information and do not share it with others.

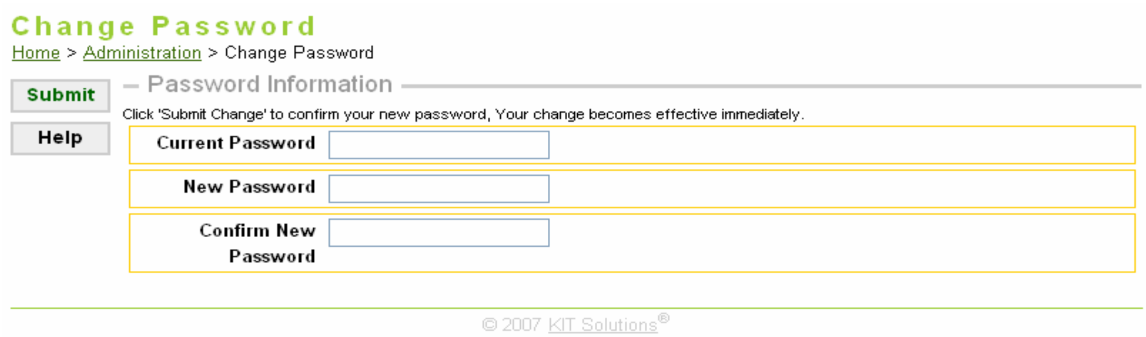
Changing Your Password

The default account for Counties and Tribes is:

Username	admin
Password	pass

Since we use this default convention for every default account, we encourage you to change your password upon initial log-in to protect and secure your data.

1. Click **Administration** in the menu.
2. Click **Change Password** in the Sub-Menu.



3. Fill in the appropriate fields.
   *Note: if your 'New Password' and 'Re-enter New Password' are not identical, the system will not accept them and you will be asked to re-enter the two. Take special care when typing these two fields.
4. When finished, click the **Submit Change** button.

Managing User Accounts

Since the admin account is the only account automatically created in the system, you should create a new User ID and Password for yourself and others that will be using the system in your organization.

Creating New User Accounts

1. Log-in to the PBPS.
2. Click **Administration** in the Menu.
3. Click **Staff** in the Sub-Menu.
4. Click **Add** in the Task Pane.
   The table below shows the available fields.
   *Note: Red text and Asterisk denote required fields.

Login Information	General Information	Demographic Information	Education Information	Contact Information
User ID*[i]	**Salutation***	**Birth Date***	Degree	**Work Phone***
Password*	**First Name***	**Gender***	Vocational Education	Work Phone Ext
	Last Name*	**Race***	Field of Study	**Email***
	Title*[ii]	**Ethnicity***		Work Address
	Status*			Work City
	Second Language			Work State
	Background Checked?[iii]			Work Zip Code

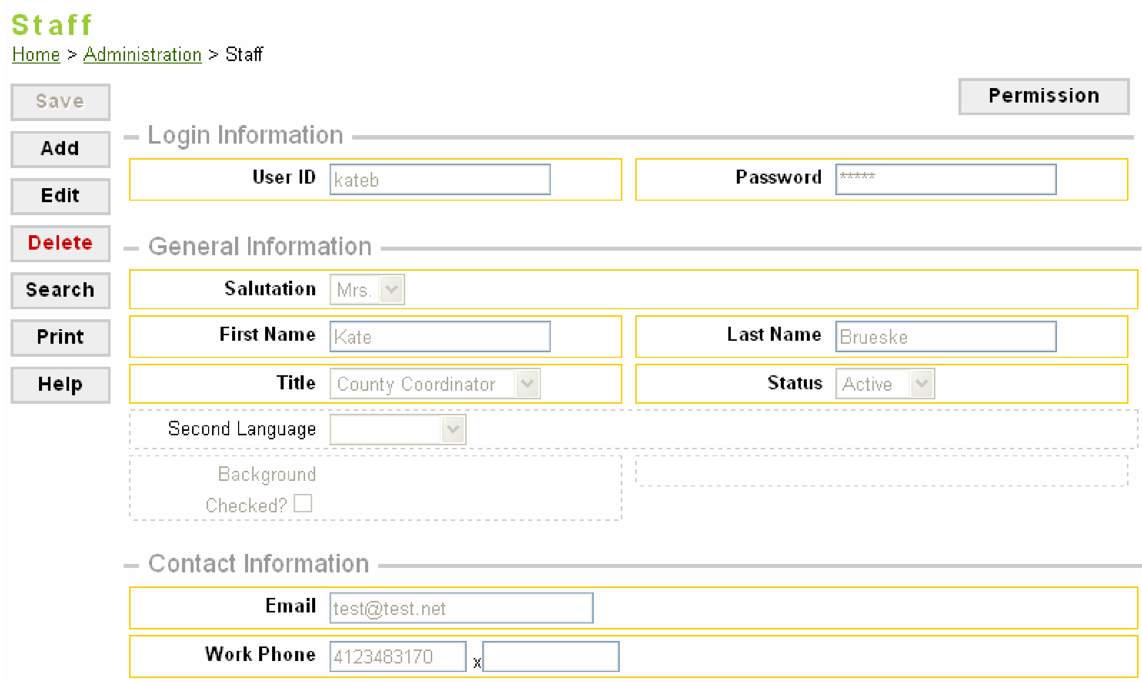
	Sub Contractor[iv]			Alternate Address
				Second Phone
				Fax

i: User IDs should use the following convention: LastName,FirstInitial,MiddleInitial (ex: John Q. Smith = SmithJQ)

ii: Refers to job classification. Please see the section on permissions before continuing.

iii: In accordance with RCW 43.20A.710, RCW43.43.832, RCW 74.34 and RCW71A.10.020, all contractors, subcontractors or volunteers who have unsupervised access to children or vulnerable adults are required to have a background check, and all persons convicted of crimes listed in RCW 43.43.830 and RCW 43.43.842 are prohibited from having access to those clients.

iv: Please reference the Sub Contractor section



(Partial Screen Shot)

5. When the form is accurate and complete, click **Save** in the Task Pane. If you decide not to not save any changes made to this form, click **Cancel** in the Task Pane.

   *Note: If there is a required field that does not contain data and you try to save, you will receive an error message (displaying the problem and the field). You will then have an opportunity to populate the field.

Editing User Accounts

1. Log-in to the PBPS.
2. Click **Administration** in the Menu.
3. Click **Staff** in the Sub-Menu.
4. Click **Search** in the Task Pane
   ***Note:** See Searching for help on using the search feature.
5. Click the radio button next to **Show All**.
6. Click the **Select** button to the left of the desired user name.
7. Click **Edit** in the Task Pane.
8. Make changes to the form.
9. Click **Save** in the Task Pane to commit your changes.
   ***Note:** If you do not want to save your changes, click **Cancel**.

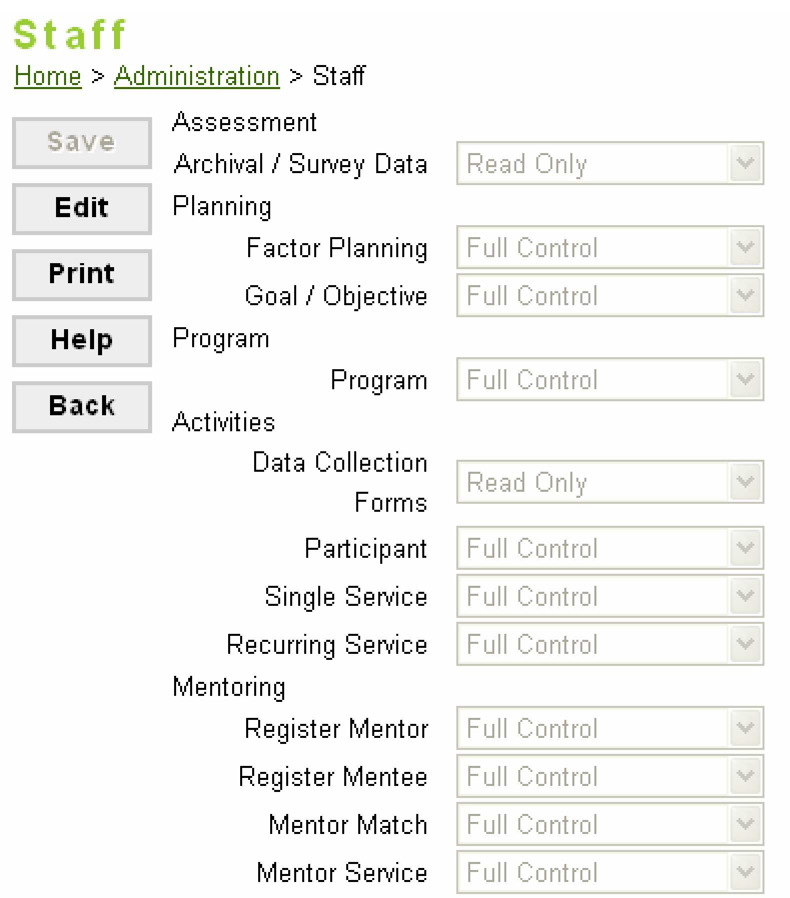
Permissions

Permissions control the access level of a particular user. There may be some data that you may not want a user to either have access to view or to edit. In order to restrict usage, you need to assign permissions to the users. This can be done in two different methods. The first is to use the recommended (and default) access level assigned to a particular title (which is a mandatory field in the Staff Information form relating to the job classification of the employee). The second is to manually configure the permissions based on a case by case basis.

At this point, you should determine what level of permission (or access rights) to the system that you want to grant to this particular user. Please see the Permissions Table for a complete list of formulated access rights to the system.

Changing Staff Permissions by Changing Title (Job Classification)

1. Log-in to the PBPS.
2. Click **Administration** in the Menu.
3. Click **Staff** in the Sub-Menu.
4. Click **Search** in the Task Pane
   ***Note:** See Searching for help on using the search feature.
5. Click the radio button next to **Show All**.
6. Click the **Select** button to the left of the desired user name.
7. Click **Edit** in the Task Pane.
8. Reference the permissions table to determine level of access.
9. Make a selection from the **Title*** drop down menu.
10. Click **Save** in the Task Pane to commit your changes.
   ***Note:** If you do not want to save your changes, click **Cancel**.



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Custom Staff Permissions by Modifying from Title

1. Log-in to the PBPS.
2. Click **Administration** in the Menu.
3. Click **Staff** in the Sub-Menu.
4. Click **Search** in the Task Pane
   *__Note:__ See Searching for help on using the search feature.
5. Click the radio button next to **Show All**.
6. Click the **Select** button to the left of the desired user name.
7. Reference the permissions table to determine desired level of access.
   It may be easier to change the Title* field to more closely reflect the desired custom permissions so that you don't have to manually set each field. In order to do this: Click **Edit** in the task pane. Make a selection from the **Title*** drop down menu. Click **Save** in the Task Pane to commit your changes. If you do not want to save any changes made to this form, click **Cancel** in the Task Pane.
8. Click the **Permission** button in the upper right section of the form.
9. Click the **Edit** in the task pane.
10. Select the appropriate permission level in the down boxes next to each Menu section
11. Click **Save** in the Task Pane to commit your changes.
    *__Note:__ If you do not want to save your changes, click **Cancel**.
12. Click **Back** to return to the Staff Information form.

Subcontractors

Users at the Service Provider Level (subcontractor level), have the option of linking the participant identification directly to the user that created them, to insure participant confidentiality from other users.

An example may be a contracting agency that has multiple staff members who serve different school districts. One of their school districts may require complete participant confidentiality. By selecting Administration in the Menu, Staff in the Sub-Menu, the Staff Information form appears. Checking the "Subcontractor" check box in the form ensures that the participant record (including personal information) can only be viewed by the user that created it.

*Note: A County or Tribe can only view the participant records of which that County or Tribe is the service provider (no subcontractor). In other words, County, Tribe, and State Levels are prohibited from viewing the participant records (including personal information) created by Subcontractors

Subcontractors must verify the application of this option with their county prevention specialist before configuring this feature.

Managing Organization IDs - County & Tribe

The Organization ID that you used to sign into PBPS is associated with the County or Tribe for whom you work. When the Organization ID was created, some contact information may have been added to the account. Please review this for accuracy.

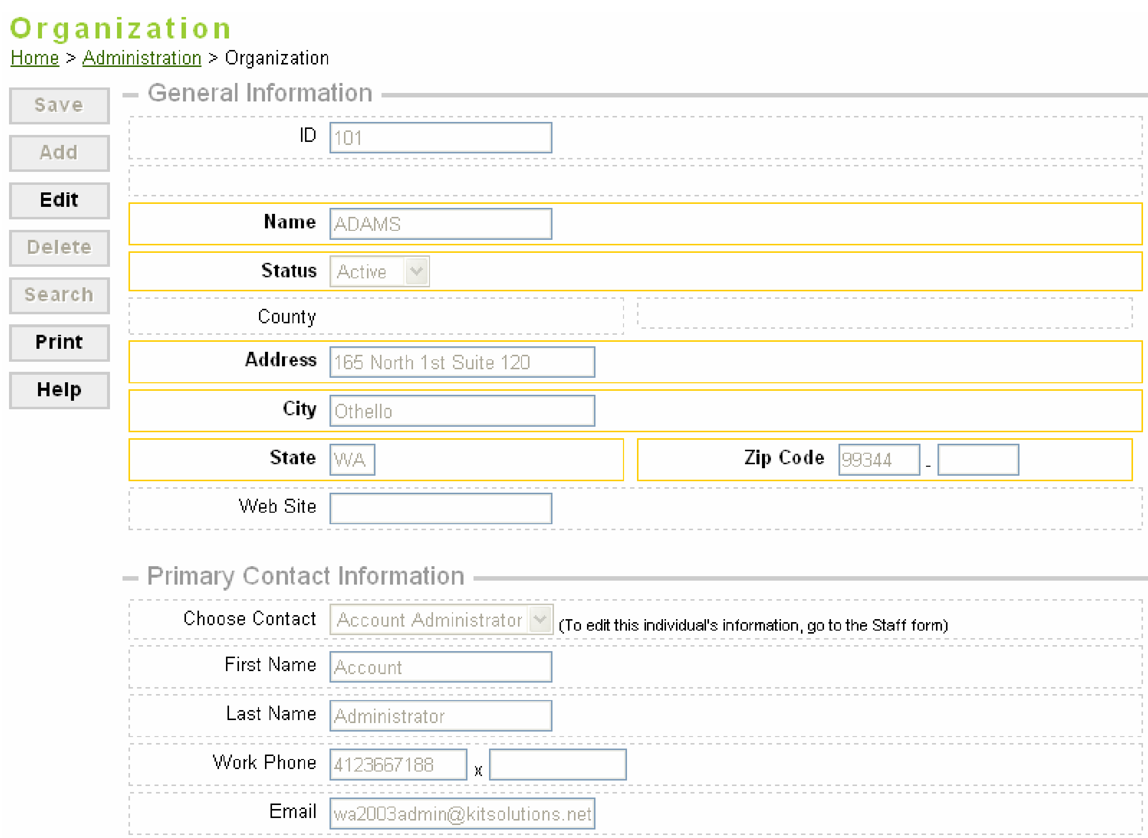
To View the Organization Information

1. Log-in to the PBPS.
2. Click **Administration** in the Menu.
3. Click **Organization** in the Sub-Menu.

To Edit the Organization Information

1. Click **Edit** in the Task Pane.
2. Make changes to the form.
3. Click **Save** in the Task Pane to commit your changes.
   ***Note:** If you do not want to save your changes, click **Cancel**.

***Note**: The County or Tribe Names and IDs can only be changed by Kit Solutions, Inc. through PBPS. If you notice an error in one of these, please submit a request through **Support** section of the Menu. This will open up another browser window. Click the **Contact Kit** link, fill in the appropriate information, and click the **Submit** button to have it changed.



Planning

Risk & Protective Factors

All of the goals, objectives, programs, and services you provide should be linked to the prioritized Risk & Protective Factors from your Needs Assessment. In the Risk and Protective Factors Targeted* field, Risk factors have a (R) in front of the factor name and Protective Factors have a (P) in front of the factor name.

Adding Risk & Protective Factors

1. Log-in to the PBPS.
2. Click **Planning** in the Menu.
3. Click **Factor Planning** in the Sub-Menu.
4. Click **Edit** in the Task Pane.
5. Click the appropriate factor for your organization from the "All risk and Protective Factors Lists". (You can select multiple factors by holding the control key while clicking [ctrl+click])
6. Click the "Up Arrow" button to move the selected factors to the "**Risk and Protective Factors Targeted***" field.

   *Note: If you accidentally make a Factor Targeted, select the erroneous Targeted Factor and click the down arrow. This removes the Factor from the Targeted field.
7. Review the Risk and Protected Factors in the "**Risk and Protected Factors Targeted***" field.
8. Click **Save** in the Task Pane to commit your changes.

   ***Note:** If you do not want to save your changes, click **Cancel**.

Goals

Once you have determined the Risk and/or Protective Factors, the PBPS automatically generates (a) Goal(s) based on the chosen Factor(s). The next step is to add objectives that will aid in the fulfillment of the generated Goal(s).

*Note: An objective can be assigned to only one Goal, but a Goal may have many objectives.

*Planning Objectives With *NEW* Objective Writer*

A new feature of the 2005-2007 PBPS is the Objective writer. This was designed to make the objectives easier to compose while ensuring the inclusion of the pertinent information. The Objective Writer was also designed to aid in analysis and reporting by using "key terms".

Adding Objectives

1. Log-in to the PBPS.
2. Click **Planning** in the Menu.
3. Click **Goals/Objectives** in the Sub-Menu.
4. Click **Add** in the Task Pane.
5. Select a **Factor*** from the Factor drop down menu.

   *Note: The factors that appear in the Factor drop down menu result from the process of Planning - Factor. The system generated Goal will be displayed.
6. Select an **Outcome*** from the list displayed by clicking **Select** to the right of the objective.

   *Note: The available outcomes to choose from are specific to each Factor. If the outcome that you desire is not in the drop down list, choose **Other**. When you choose other, the screen will refresh and an "Outcome Other" text field will appear. Type your desired outcome here.
7. Select a **Link*** (or preposition) from the Link 1 drop down menu.

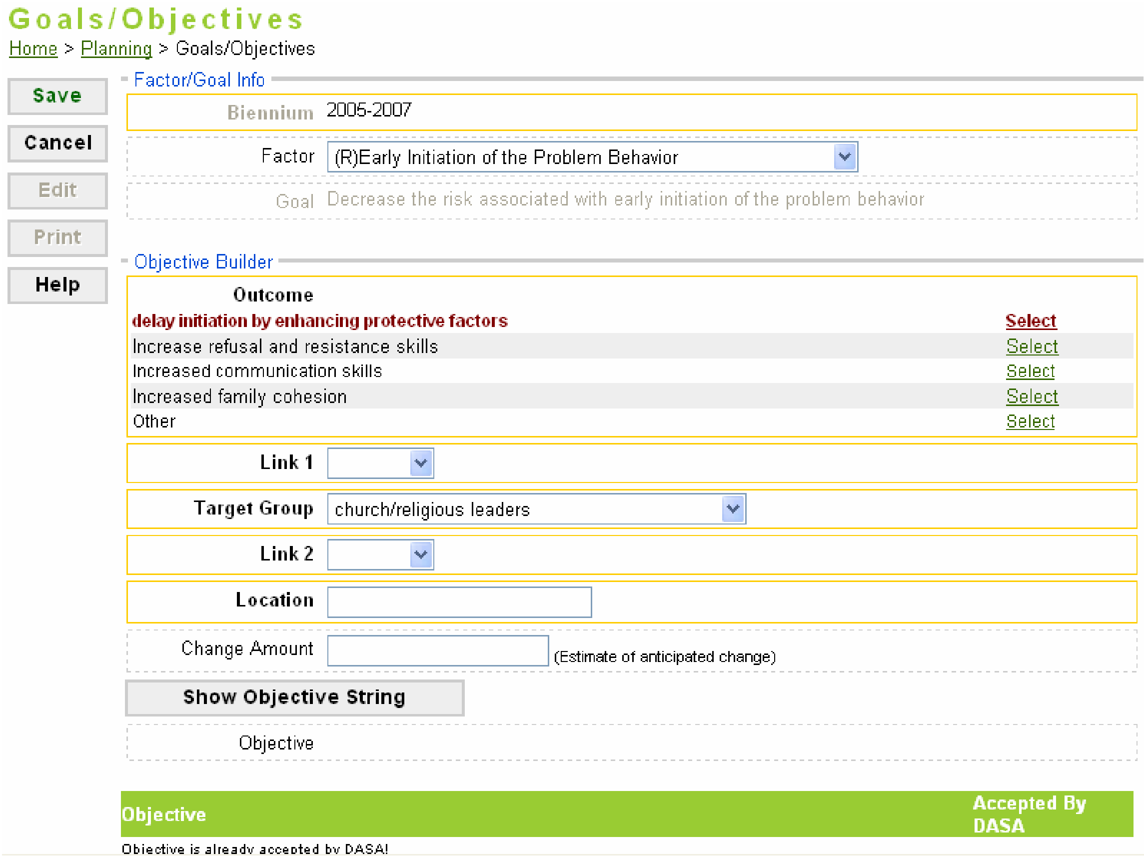
   *Note: The link (or preposition) connects the Outcome to the Target Group.
8. Select the **Target Group*** from the Target Group drop down menu.

   *Note: If the Target Group that you desire is not in the drop down list, choose **Other**. When you choose other, the screen will refresh and a "Target Group Other" text field will appear. Type your desired outcome here.
9. Select a **Link*** (or preposition) from the Link 2 drop down menu.

   *Note: The link (or preposition) connects the Target Group to the location.
10. In the **Location*** field enter the geopolitical area in which you anticipate the change to occur.

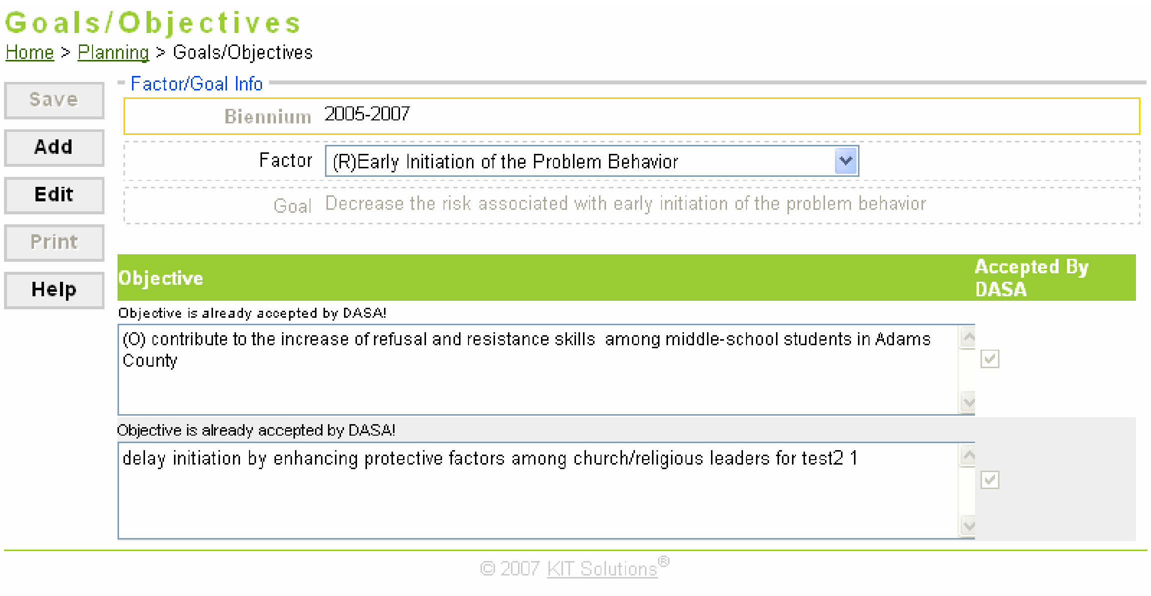
    *Examples: Clark County, Olympia School District, Kent Police Department
11. In the **Amount*** field input a quantitative estimate of anticipated change.
12. Enter an estimate of anticipated change in the optional **Change Amount** box.
13. Click the **Show Objective String** button.

    *Note: This will refresh the page and display the sentence [outcome] [link] [target group] [link] [location] under the **Show Objective String** button for review. If you want to make changes to the displayed sentence, change the appropriate fields. Click the **Refresh Objective String** button to preview objective.



(Partial Screen Shot)

14. Click **Save** in the Task Pane to commit your changes.
    *__Note:__ If you do not want to save your changes, click **Cancel**.
    **Note: Once the objective has been saved, it will appear at the bottom of the table of other objectives associated with that factor.
15. Click the **Submit** button to submit the associated objective for approval by your Regional Prevention Manager (RPM).
    *Note: The RPM will accept the objective or contact you with recommendations for editing and resubmission. You will receive an email from the PBPS when the RPM accepts your objective. At this point you can continue to develop your program.
    **Note: Once the Objective is submitted, it cannot be edited. Please check that the objective is complete and accurate.
16. Once you have submitted the objective a pop-up will appear. Click **OK** to submit or **Cancel** to not.
    *Note: If you clicked **OK** then you will receive another pop-up reporting the status of the submission (success or fail). Click **OK**. Notice the absence of the Submit button next to the recently submitted objective. Also, the text above the data field containing the objective now reads “Under review by DASA!” when before submission it read “You can edit this objective!”.



Editing Objectives

1. Log-in to the PBPS.
2. Click **Planning** in the Menu.
3. Click **Goals/Objectives** in the Sub-Menu.
4. Select a **Factor*** from the Factor drop down menu.

   *Note: The factors that appear in the Factor drop down menu result from the process of Planning - Factor. The Goal Description changes when a different factor is selected from the drop down menu.
5. Click **Edit** in the Task Pane.
6. Click the **Edit** button next to the objective that you wish to modify.

   *Note: If the Edit button is not present next to the objective, the objective is not available for editing. If this objective needs to be modified, contact your Regional Prevention Manager (RPM).
7. Make changes to the form.
8. Click the **Refresh Objective String** button.

   *Note: This will refresh the page and display the sentence [outcome] [link] [target group] [link] [location] under the **Show Objective String** button for review. If you want to make changes to the displayed sentence, change the appropriate fields and click the **Refresh Objective String** button.
9. Click **Save** in the Task Pane to commit your changes.

   ***Note:** If you do not want to save your changes, click **Cancel**.

   *Note: Once the objective has been saved, it will appear at the bottom of the list of other objectives associated with that factor.
10. Click the **Submit** button to submit the associated objective for approval by your Regional Prevention Manager (RPM).

    *Note: The RPM will later accept the objective or contact you with recommendations for editing and resubmission. You will receive and email from the PBPS when RPM accepts your objective at which point you can continue to develop your program.

    **Note: Once the Objective is submitted, it cannot be edited. Please check that the objective is complete and accurate.
11. Once you have submitted the objective a pop up will appear. Click **OK** for submit or **Cancel** to not.

    *Note: If you clicked **OK** then you will receive another pop up reporting the status of the submission (success or fail). Click **OK**. Notice the absence of the Submit button next the recently submitted objective. Also, the text above the data field containing the objective now reads “Under review by DASA!” when before submission it read “You can edit this objective!”.

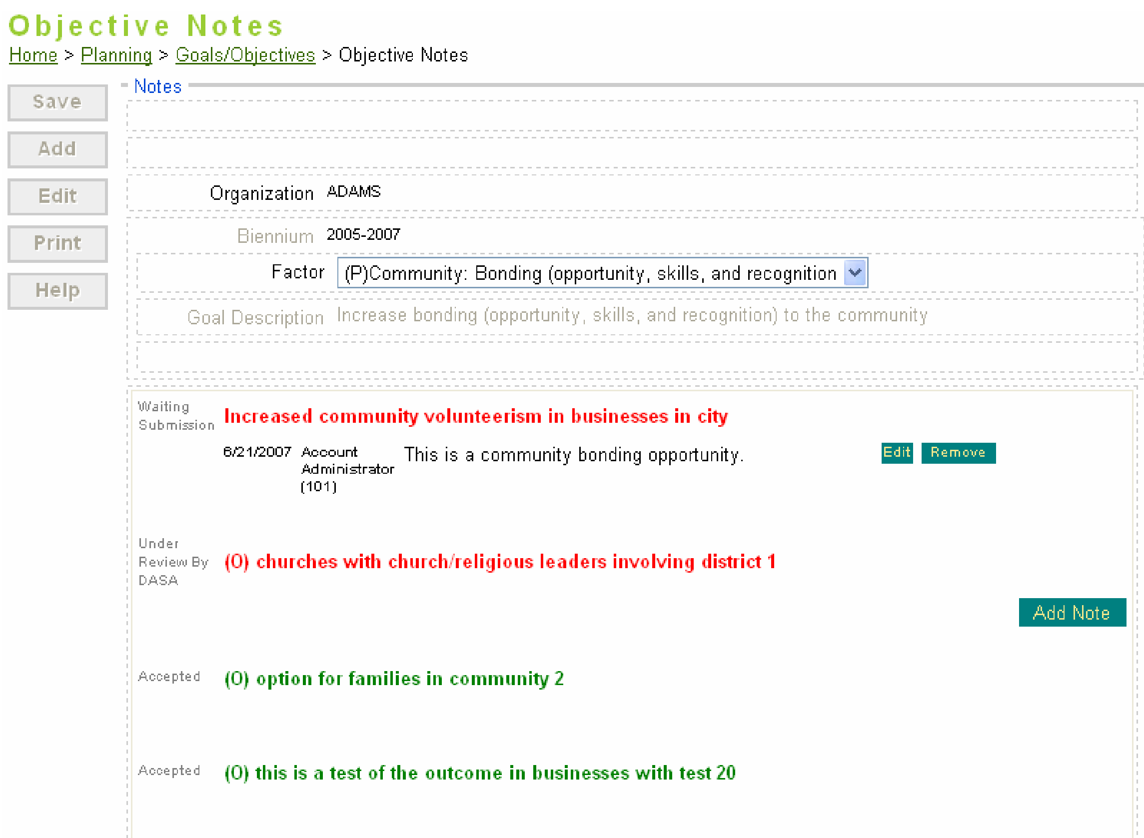
*Objective Notes *NEW**

Objective Notes are meant to compliment the Objective Writer by enabling prevention specialists to clarify questions or supply additional information about objectives for the RPM to review before approving that objective.

Objective Notes are organized by their associated Factor. Objective Notes can only be attached to Objectives that have been already been entered into the PBPS. Each objective can only have one attached note which can be later edited.

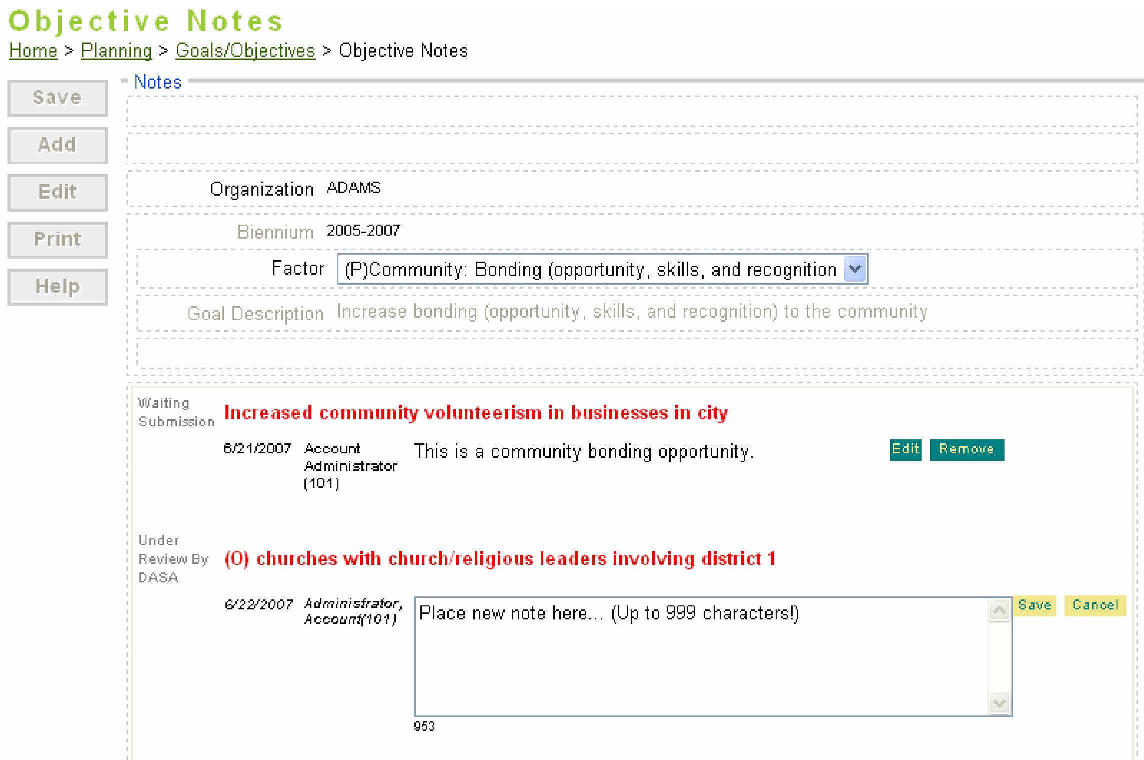
Adding Objective Notes

1. Log-in to the PBPS.
2. Click **Planning** in the Menu.
3. Click **Objective Notes** in the Sub-Menu.
4. Select a factor from the **Factor*** drop down menu.
   *Note: This step will display the Goal Descriptions of the selected factor.



(Partial Screen Shot)

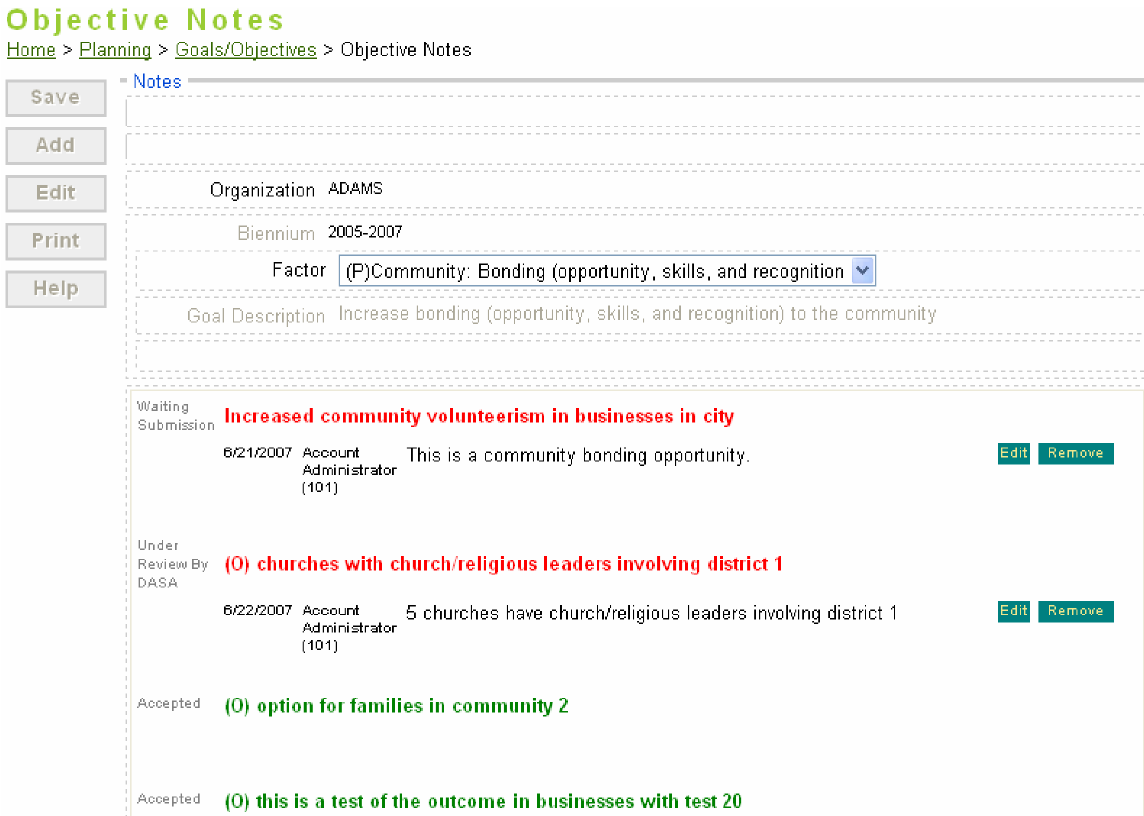
5. Under the appropriate Goal Description, click the **Add Note** button.
   *Note: A new text data field will appear.
6. Write your note in the text data field [where it reads Place new note here… (Up to 999 characters!)].



7. Click **Save** next to the comment box to commit your changes.
   ***Note:** If you do not want to save your changes, click **Cancel**.

Editing Objective Notes

1. Log-in to the PBPS.
2. Click **Planning** in the Menu.
3. Click **Objective Notes** in the Sub-Menu.
4. Select from the **Factor*** drop down menu a factor that you desire to address.
   *Note: The Goal Descriptions of the selected factor will be displayed.
5. Click the **Edit** button next to the Objective Note.
6. Make your changes to the text data field.
7. Click **Save** next to the comment box to commit your changes.
   ***Note:** If you do not want to save your changes, click **Cancel**.



Removing Objective Notes

1. Log-in to the PBPS.
2. Click **Planning** in the Menu.
3. Click **Objective Notes** in the Sub-Menu.
4. Select from the **Factor*** drop down menu a factor that you desire to address.
   *Note: This step will display the Goal Descriptions of the selected factor.
5. Click the **Remove** button next to the Objective Note.
   *Note: The following message will appear:

6. Click **OK** if you want to remove the Objective Note. Click **Cancel** if you do not want to delete the Objective Note.

Programs

Programs are implemented with the intention that they will result in a specific objective. That objective is associated to a goal that is tied to a particular risk or protective factor. The program you select is the means by which you address risk and/or protective factor(s) in your community. Objectives must be entered into the PBPS and accepted by DASA before programs can be created.

Programs have to be accepted by DASA. Once a program is accepted by DASA, it cannot be edited without contacting your RPM.

Adding Innovative/Other Programs

1. Log-in to the PBPS.
2. Click **Planning** in the Menu.
3. Click **Programs** in the Sub-Menu.
4. Click **Add** in the Task Pane.
5. Click the radio button selecting **Innovative/Other**.
6. Open the **Objectives*** list by clicking the down arrow next to the objective box and **Select** one.

   *Note: The objectives displayed in the Objective drop down menu are the ones that you have entered into the system. You may have several programs addressing a particular objective, but you may only have one objective associated with each program.
7. Type the program name in the **Program Name*** field.
8. Type the description in the **Description*** field.
9. Select the funding source from the **Funding Sources*** drop down menu.

Type	Description
SAPT Block Grant	DASA Prevention funds
State General	Other State funds
Underage Drinking (OJJDP)	RUaD Funds

10. Type the funding amount from the funding source chosen above in the **Funding Amount ($)*** data field.

    *Note: The **Matching Amount ($)** is only added after the program has been saved and you have completed the Matching Funds section.
11. Select the **Fund Type*** from the drop down menu.
12. Select the target population(s) of the program from the **DASA Population*** drop down menu.

    *Note: By selecting a DASA Population the title of the group is added to the data field below the drop down menu. If you erroneously added a population and want to remove it, select that population in the data field and click the arrow pointing up to remove it.
13. Select the (Institute of Medicine) IOM Model Type from the **IOM Model Type*** drop down menu.

Type	Description
Universal	Strategies targeted to the general public or a whole population group that has not been identified on the basis of individual risk.
	Universal Direct: Interventions directly serve an identifiable group of participants but who have not been identified on the basis of individual risk (e.g. school curriculum, after school program, parenting class)
	Universal Indirect: Interventions support population-based programs and strategies, including the provision of information.
Selective	Strategies target subset of the total population that is deemed to be at risk.
Indicated	Strategies are designed to prevent the onset of substance abuse in individuals who do not meet DSM-IV criteria for addiction, but who are showing early danger signs.

14. Select the implementation type from the **Implementation Type*** drop down menu.

Type	Description

Replication	Implementation of a Best Practice or promising approach with no modifications.
Adaptation	Implementation of a Best Practice or promising approach with modifications to curriculum, delivery, or target population.
Innovation	A program that is not a Best Practice or promising approach on the WestCAPT website.
Other	Anything else.

Western Center for Applied Prevention Technologies (WestCAPT) – http://casat.unr.edu/westcapt/

15. Unless the program will not have any service activities for 30+ days, select **Active** in the **Status*** drop down menu.
16. Type the total number of sessions the program will have in the **Number of Sessions*** text field.
17. Type the total number of hours of direct service for this program in the **Total Hours*** text field.

    *Example: If there are twenty occurrences of half hour sessions, then the total number of hours would be ten.
18. Select yes or no in the **Mentoring*** drop down menu.

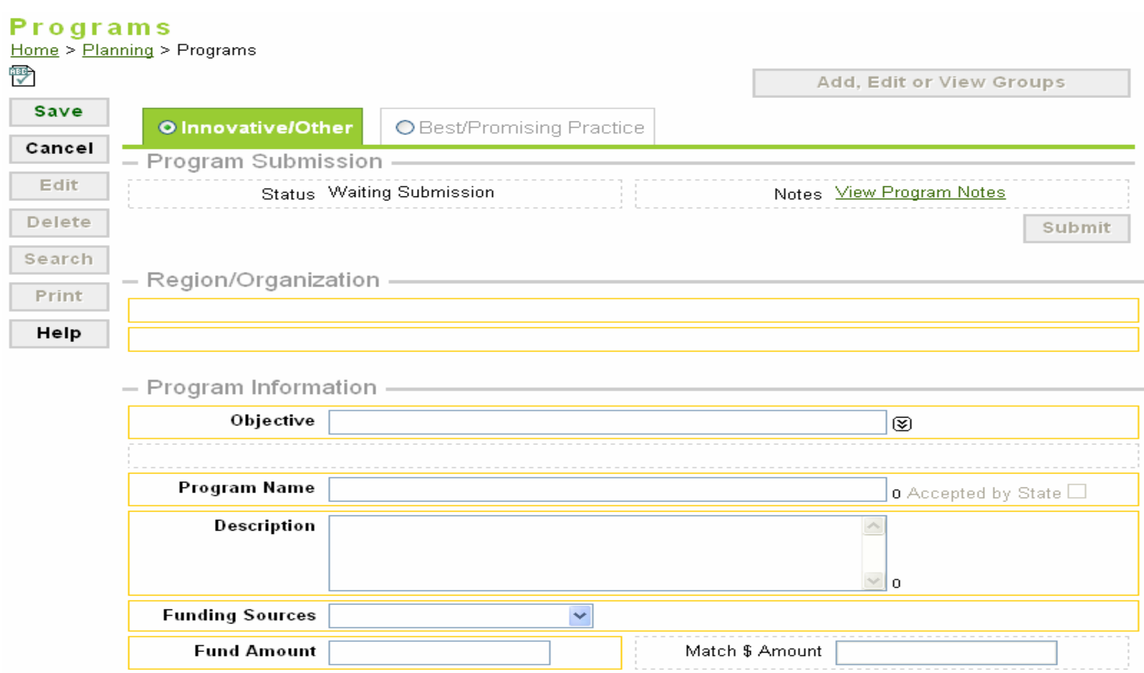
    *Note: If you do not select Yes in the **Mentoring*** drop down menu, this program will not be available in the mentoring form.
19. Select yes or no in the **CTI Research*** drop down menu.
20. If you have Assessment Instruments to add select those from the **Assessment Instruments** drop down menu. In order to add the selection in the drop down menu to the data field below, click the Apply button.

    *Note: If you erroneously added an Assessment Instrument and want to remove it, select that Assessment Instrument in the data field and click the “up arrow” to remove it.

    Note: Once the Assessment Instrument has been selected in the drop down menu, click the **Info button to preview the survey instrument administered to the target audience to review drop down menu choice.
21. Click **Save** next to the comment box to commit your changes.

    ***Note:** If you do not want to save your changes, click **Cancel**.

    *Note: You can only add Matching Funds after saving the program. After you save the program, add Matching Funds.



(Partial Screen Shot)

Adding Best/Promising Practice Programs

In some Best/Promising Practice programs, some of the following data fields may be automatically filled. If so, you are encouraged, unless under special circumstances, to leave these auto-filled data fields alone.

1. Log-in to the PBPS.
2. Click **Planning** in the Menu.
3. Click **Programs** in the Sub-Menu.
4. Click **Add** in the Task Pane.
5. Click the radio button selecting **Best/Promising Practice**.
6. Select the objective that the program will address from the **Objective*** drop down menu.

   *Note: The objectives displayed in the Objective drop down menu are the ones that you have entered into the system. You may have several programs addressing a particular objective, but you may only have one objective associated with each program.
7. Select the Science Based program type from the **Science Based** drop down menu.

Type	Description
Best Practice	Considered a best practice on the WestCAPT website.
Promising Approach	Considered a promising approach on the WestCAPT website

8. Select the program you are going to implement in the drop down menu next to the right of the **Science Based** drop down menu.

   *Note: For more information about WestCAPT and types of programs, click the INFO button. This will create a pop-up window displaying the WestCAPT website.
9. Click the **Apply** button.

   *Note: The **Description*** field is automatically filled in based on the WestCAPT website.
10. Select the funding source from the **Choose Funds*** drop down menu.

Type	Description
SAPT Block Grant	DASA Prevention funds
State General	Other State funds
Underage Drinking (OJJDP)	RUaD Funds

11. Type the funding amount from the funding source chosen above in the **Funding Amount ($)*** data field.

    *Note: The **Matching Amount ($)** is only added after the program has been saved and you have completed the Matching Funds section.
12. Select the target population(s) of the program from the **DASA Population*** drop down menu.

    *Note: By selecting a DASA Population the title of the group is added to the data field below the drop down menu. If you erroneously added a population and want to remove it, select that population in the data field and click the arrow pointing up to remove it.
13. Select the target population(s) of the program from the **DASA Population*** drop down menu.
14. Select the (Institute of Medicine) IOM Model Type from the **IOM Model Type*** drop down menu.

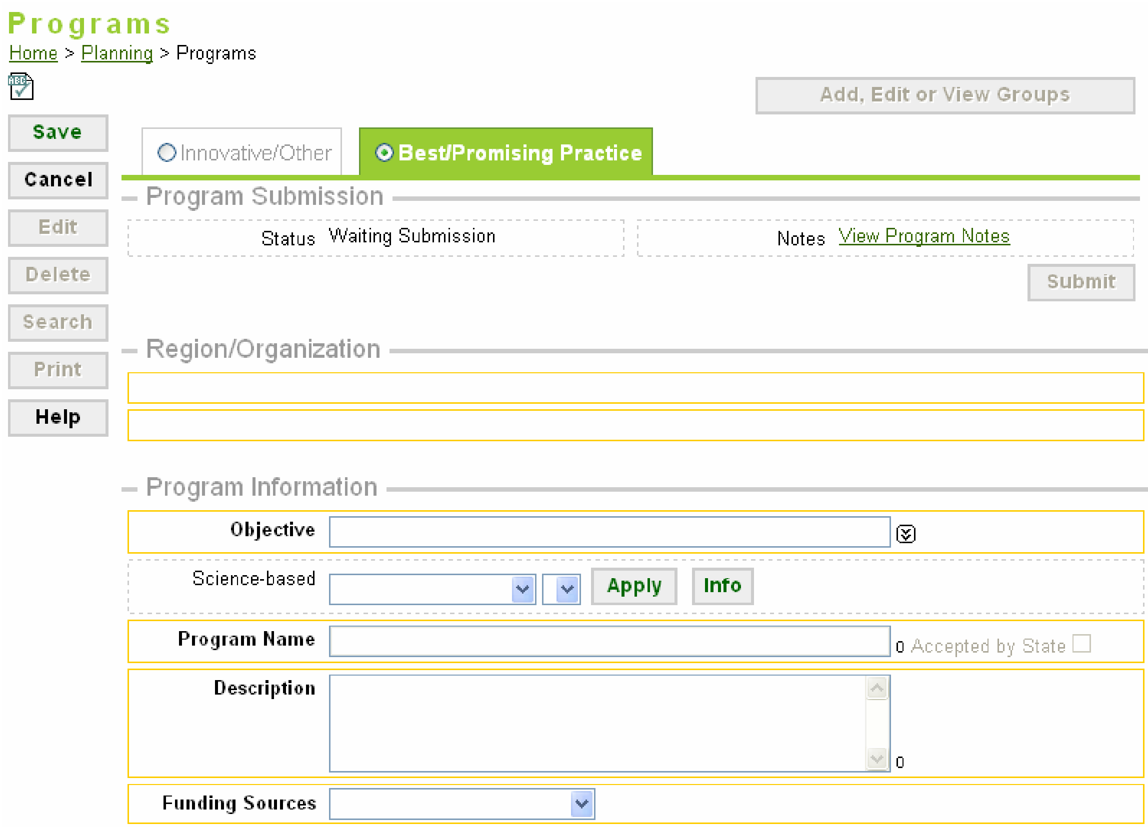
Type	Description
Universal	Strategies targeted to the general public or a whole population group that has not been identified on the basis of individual risk.
	Universal Direct: Interventions directly serve an identifiable group of participants but who have not been identified on the basis of individual risk (e.g. school curriculum, after school program, parenting class)
	Universal Indirect: Interventions support population-based programs and strategies, including the provision of information.
Selective	Strategies target subset of the total population that is deemed to be at risk.
Indicated	Strategies are designed to prevent the onset of substance abuse in individuals who do not meet DSM-IV criteria for addiction, but who are showing early danger signs.

15. Select the implementation type from the **Implementation Type*** drop down menu.

Type	Description
Replication	Implementation of a best practice or promising approach with no modifications.
Adaptation	Implementation of a best practice or promising approach with modifications to curriculum, delivery, or target population.
Innovation	A program that is not a best practice or promising approach on the WestCAPT website.
Other	Anything else.

Western Center for Applied Prevention Technologies (WestCAPT) – http://casat.unr.edu/westcapt/

16. Unless the program will not have any service activities for 30+ days, select Active in the **Status*** drop down menu.
17. Type the total number of sessions the program will have in the **Number of Sessions*** text field.
18. Type the total number of hours of direct service for this program in the **Total Hours*** text field.
    *Example: If there are twenty occurrences of half hour sessions, then the total number of hours would be ten.
19. Select yes or no in the **Mentoring*** drop down menu.
    *Note: If you do not select Yes in the **Mentoring*** drop down menu, this program will not be available in the mentoring form.
20. Select yes or no in the **CTI Research*** drop down menu.
21. If you have Assessment Instruments to add select those from the **Assessment Instruments** drop down menu. In order to add the selection in the drop down menu to the data field below, click the **Apply** button.
    *Note: If you erroneously added an Assessment Instrument and want to remove it, select that Assessment Instrument in the data field and click the arrow pointing up to remove it.
    Note: Once the Assessment Instrument has been selected in the drop down menu, click the **Info button to preview the survey instrument administered to the target audience to review drop down menu choice.
22. Click **Save** in the task pane to commit your changes.
    ***Note:** If you do not want to save your changes, click **Cancel**.
    *Note: You can only add Matching Funds after saving the program. After you save the program, add Matching Funds.



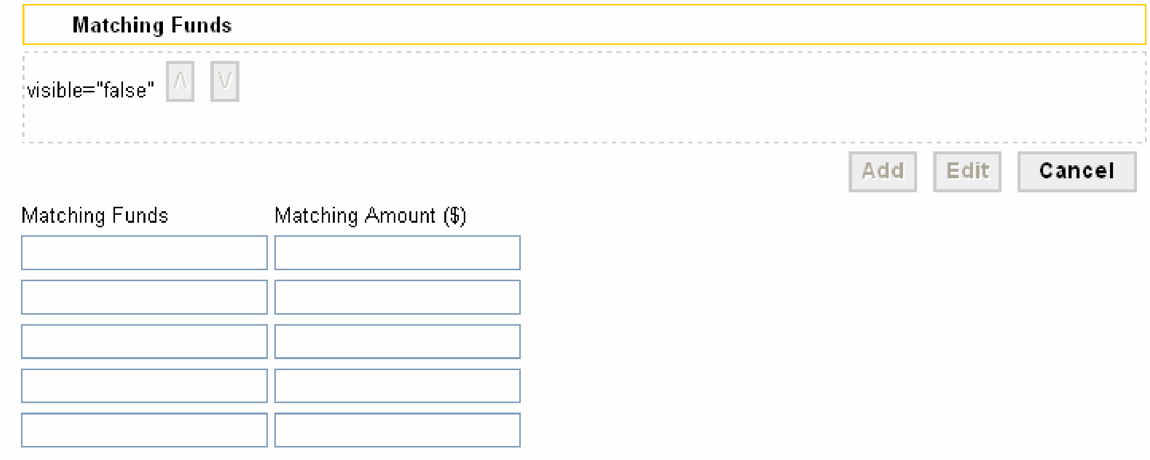
(Partial Screen Shot)

Adding Matching Funds

Adding Matching Funds can only be done after a program has been saved.

1. Log-in to the PBPS.
2. Click **Planning** in the Menu.
3. Click **Programs** in the Sub-Menu.
4. Click **Add** in the Task Pane.
5. Scroll down to the bottom of the page and across from **Matching Funds** click the **Add** button.
6. Type the name of the Matching Funds in the **Matching Funds** text field. Type the dollar amount in the **Matching Amount ($)**.
7. Click **Save** in the task pane to commit your changes.
   ***Note:** If you do not want to save your changes, click **Cancel**.

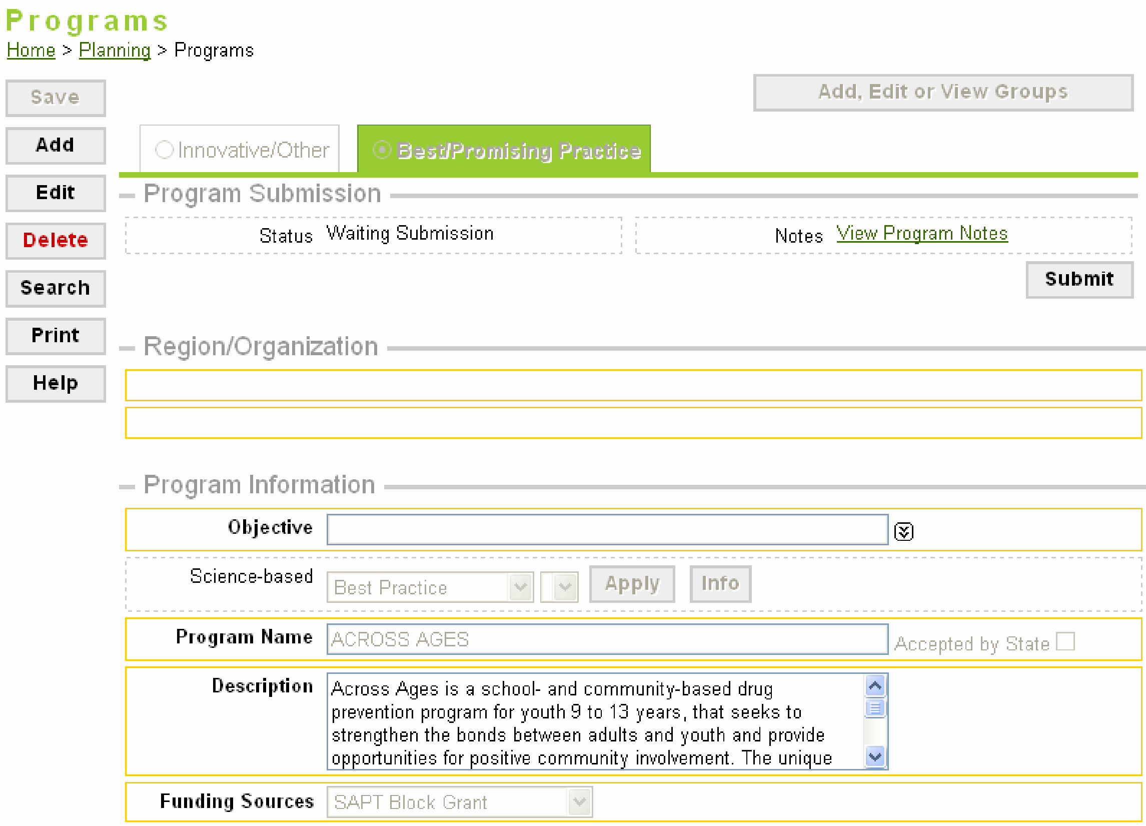
   *Note: By saving the Matching Funds the **Matching Amount ($)** data field below the **Funding Amount ($)** in the top half of the form which was and will continue to be locked from editing.



Creating a Group and Adding it to a Program

In the PBPS, group management was designed to make Recurring Services (see Services) easy to track and record. To each Recurring Service, a program and group must be associated. Each group is composed of designated participants upon which the service will be performed. So, when you associate a Recurring Service with a group, all the members of that group are associated with the Recurring Service. Groups can be modified on the fly - a participant can be added at any time or removed only if the service has not commenced. When adding a new participant to the PBPS you may assign them to particular groups.

1. Log-in to the PBPS.
2. Click **Planning** in the Menu.
3. Click **Programs** in the Sub-Menu.
4. Click the radio button next to **Show All**.
5. Find the program to which you would like to add a group and click the **Select** button.
6. Click the **Add, Edit or View Groups** button at the top of the page.

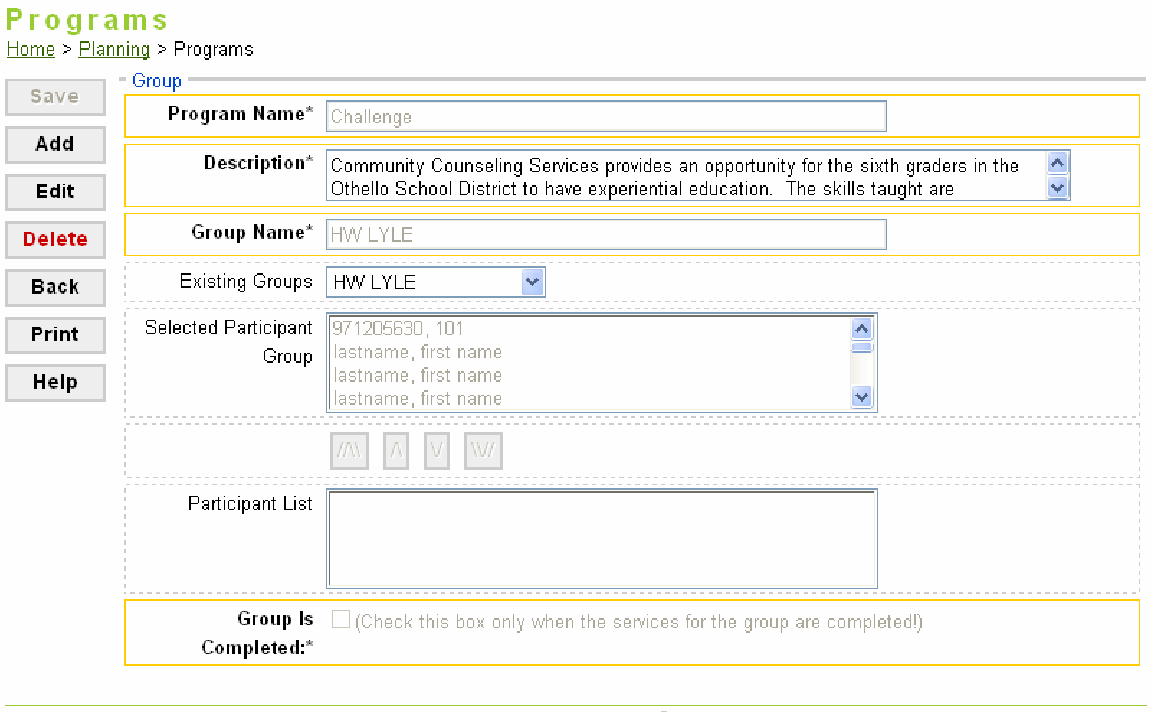


7. Click **Add** in the Task Pane.
8. Type a unique and descriptive Group Name in the **Group Name*** text field.

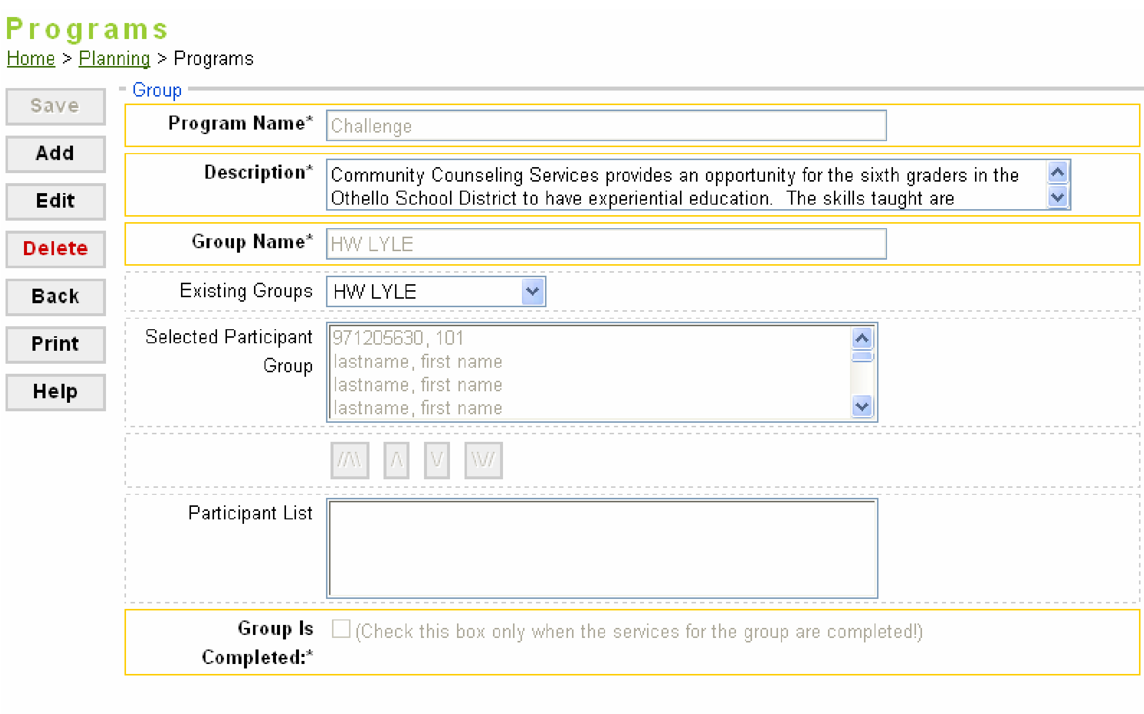
   *Note: No two groups may share the same name.
9. If desired, select participants from the Participant List and click the buttons to add or remove participants from the Participant List. You do not have to add participants to the group at this time.

   *Note: Clicking the single arrow < or > will move only the selected participant into or out of your group. If you want every participant in the participant list added use the << button. If you want every participant removed from your group, use the >> button.

   **Note: If you want a participant who has not yet been added to the PBPS (not present in the Participant List) to be added to this group and subsequently the Recurring Service, you may do so when you add the Participant to the PBPS.



10. Click **Save** in the task pane to commit your changes.
 *__Note:__ If you do not want to save your changes, click **Cancel**.
 *Note: Notice how the newly created group now appears in the Existing Groups drop down menu.



Editing Group Already Added to a Program

1. Log-in to the PBPS.

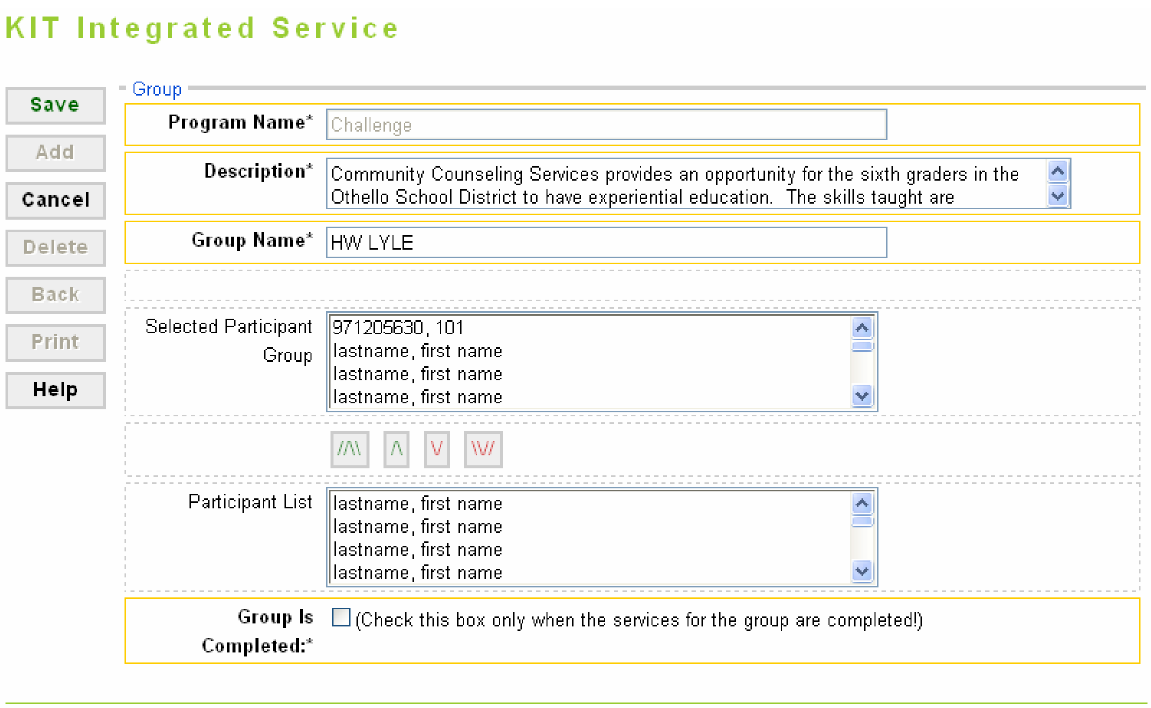
2. Click **Planning** in the Menu.
3. Click **Program** in the Sub-Menu.
4. Click the radio button next to **Show All**.
5. Find the program to which you would like to add a service and click the **Select** button.
6. Click the **Add, Edit or View Groups** button.
7. Click **Edit** in the Task Pane.
8. Click the arrow buttons to move the participants from the Selected Participant Group and the Participant List.

   *Note: Clicking the single arrow < or > will move only the selected participant into or out of your group. If you want every participant in the participant list added use the << button. If you want every participant removed from your group, use the >> button.

   **Note: If you want a participant who has not yet been added to the PBPS (not present in the Participant List) to be added to this group and subsequently the Recurring Service, you may do so when you add the Participant to the PBPS.

   ***Note: Groups do not need to be populated to be attached to Recurring Services.
9. Click **Save** in the task pane to commit your changes.

   ***Note:** If you do not want to save your changes, click **Cancel**.



Program Reporting Status Page

To View programs at the Program Status Page:

1. Click **Planning** in the Menu.
2. Click **Program Status** link in the Sub-Menu.
3. Find the program and the month of which you desire to check the status.
   a. If the corresponding cell has a check, then the program is Active.
   b. If the corresponding cell doesn't have a check, then the program is Inactive.

Changing the Status of a Program

1. Click **Planning** in the Menu.
2. Click the **Program Status** in the Sub-Menu.
3. Click **Edit** in the Task Pane
4. Find the program and the month of which you desire to check the status and click the check box to mark with a check (Active) or remove the Check (Inactive).
   ***Note:** If you cannot make or release a check mark on the page, you have skipped step 3. You must click Edit in the task pane before you can make changes to the grid.
5. Click **Save** in the Task Pane.

Adding a Note

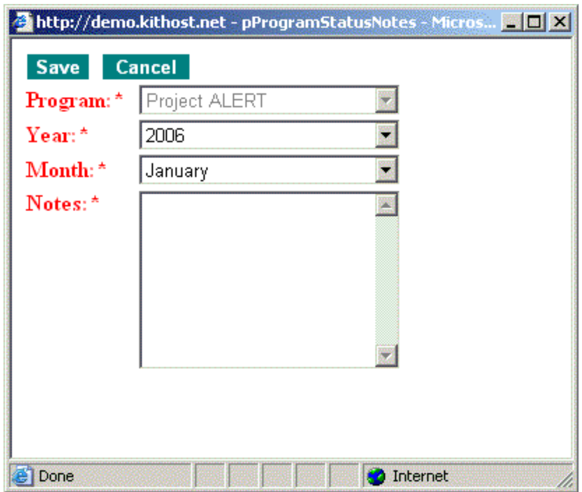
You can add a note to the grid for your tracking purposes or as communications to your RPM.

**Example, say your iteration of Project Alert was scheduled to begin on Mar 30 and meet every Thursday there after for 12 sessions. However, the session did not begin that night due to a conflict in meeting location and had to be pushed back until April 6. In order to communicate that to your RPM and justify why it was that the program was marked Active, but no services were recorded, you could create a Note. In that note you could explain the reason why the program did not start and therefore why you changed the status from Active to Inactive for the month of March.

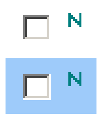
When a note is added to a program, a small green N appears in the column of the month chosen in the note creation. This way, you can easily see the notes that are attached to the program and month. For instructions on how to view the note, see Viewing an Existing Note.

1. Click **Planning** in the Menu.
2. Click the **Program Status** in the Sub-Menu.
3. Click **[Add Note]** next to the desired program.

***Note:** A pop-up window will appear. If you have pop-ups disabled, you will not see the note window:

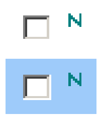


4. Select the appropriate year from the **Year:** drop down menu.
5. Select the appropriate Month from the **Month:** drop down menu.
6. Type your message to your RPM in the **Notes:** text field.
7. Click the **Save** button.
   ***Note:** The window will close upon the click of Save or Cancel.
   ***Note:** A small green N will appear in the column of the month chose in the note creation after you click save.

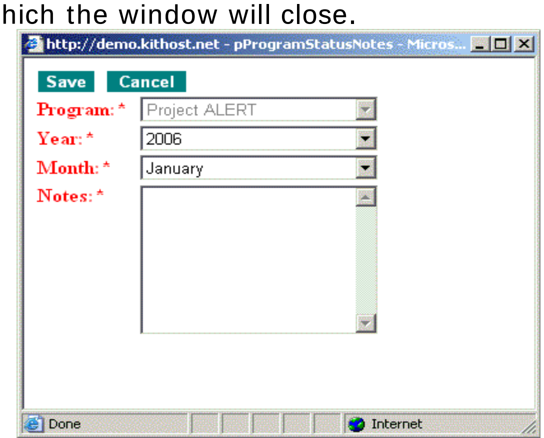


Viewing and/or editing an Existing Note

1. Click **Planning** in the Menu.
2. Click the **Program Status** in the Sub-Menu.
3. Click the small green 'N' of the desired program and month to view the note.



***Note:** A pop-up window will appear. If you have pop-ups disabled, you will not see the note window:
***Note:** You can modify and save the note by making changes and clicking the save button, after which the window will close.



Viewing the Compliance of a Program

1. Click **Planning** in the Menu.
2. Click the **Program Status** in the Sub-Menu.
3. Scroll down to the bottom of the page to view the Compliance Row.
4. RPM Compliance Override – This refers to a program that was initially out of compliance, but services were eventually entered. The RPM sets the statues to YES. The Compliant row will still remain NO, since this is locked down at midnight (or 11:59pm) on the night of the 15^{th} on the following reporting month.
5. Svc. Reporting on Inactive Prog.? – This reflects that a service was reported on an Inactive program. Although not technically out of compliance, services should be reported onActive programs only. This is allowed if older services needed to be entered in at a later date.

Here are the rules/definitions for the Compliance Row:

A Program is…

In Compliance if:

a. Status is Active and services are *recorded*
b. Status is Inactive and services are not *recorded*

Out of Compliance if:

a. Status is Active and services are not *recorded*

The preceding is summarized in the following table:

Status	Services	Compliance
Active	Not recorded	No
Active	Recorded	Yes
Inactive	Not Recorded	Yes

Services

The PBPS distinguishes services as either being single or recurring. A single service is a service that is a singular event intended for a particular target population. A recurring service is a service that is performed as a part of a series (multiple sessions) for the same target population of all the sessions in the series.

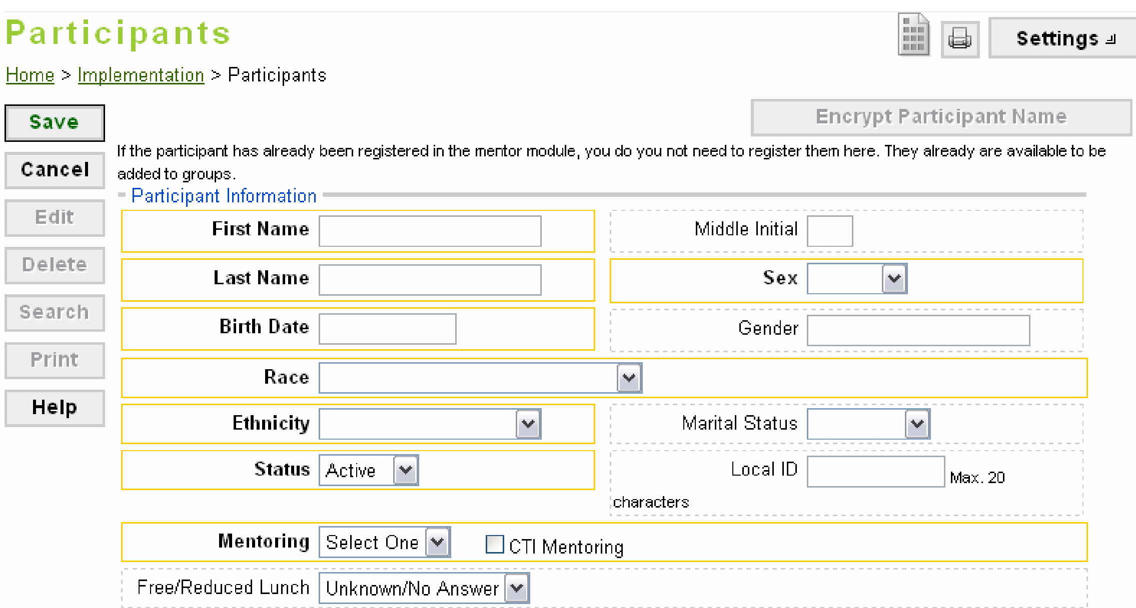
*Examples: Single – An assembly at a local school presented by a motivational speaker.
*Examples: Recurring – An eight week series of classes on the effects of drugs held at the local community center.

*Note: Before proceeding, you must have already created groups. See the section Creating a Group and Adding it to a Program.

Adding Participants

In the PBPS, the participants are the attendants of services that are used to track certain data (attendance, progress, demographics, etc.), used to generate reports by DASA, counties, tribes and service providers.

1. Click **Implementation** in the Menu.
2. Click **Participant** in the Sub-Menu.
3. Click **Add** in the Task Pane.
4. Enter participant. Categories with yellow boxes are mandatory fields; the blue boxes are optional information.
5. Click Yes or No in the **Mentoring*** field. You may enter Mentee information in this menu or in the mentoring module menu.
6. Check the **CTI** box if the participant is in the Children's Transition Initiative program.
7. Select a group from the Available Program—Groups data field.
   ***Note:** If you haven't created a Group to add participants into, go to the **Creating a Group and Adding it to a Program** section.
   ***Note:** You may also create a Group first, and then assign the participants to the group after all participants have been entered into the system. This may save time by not performing the additional group steps below if you have a large amount of participants to enter.
8. Click the Up Arrow (^) button to assign selected group.
   ***Note:** If you make a mistake, click the erroneous Assigned Program—Group and click the Down Arrow (⌄) button to remove group assignment.
9. Click **Save** or **Cancel** in the Task Pane.



(Partial Screen Shot)

Editing Participants

1. Click **Implementation** in the Menu.
2. Click **Participant** in the Sub-Menu.
3. Click **Edit** in the Task Pane
4. Make changes to the form.
5. Click **Save** or **Cancel** in the Task Pane.

Deleting Participants

***Note:** You may not delete a participant that is already used in a service or in a Mentoring program.

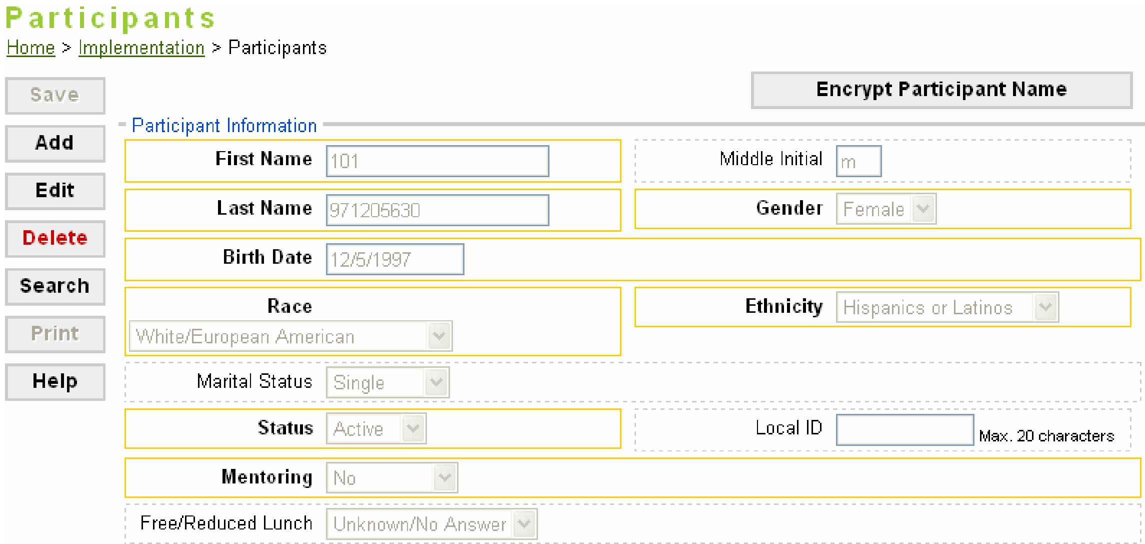
1. Click **Implementation** in the Menu.
2. Click **Participant** in the Sub-Menu.
3. Click **Search** in the Task Pane
4. Click the **Select** button for the appropriate participant.
5. Click the **Delete** button in the Task Pane.
6. Confirm the delete request.

Encrypting Participants' Names

By encrypting the participant name, the PBPS strips the name from the participant record and assigns an unidentifiable number (which becomes their ID) that is used to manage the participant within the PBPS. Encryption is important in order ensure client confidentiality and to handle the participants who withhold their name. You can only encrypt a participant's name after the participant has been added and saved into the PBPS.

***NOTE: ONCE A PARTICIPANT'S NAME IS ENCRYPTED,**
IT <u>CANNOT BE UNDONE</u> (IT IS PERMANENT).

1. Click **Implementation** in the Menu.
2. Click **Participant** in the Sub-Menu.
3. Click **Search** in the Task Pane.
4. Click the **Select** button for the appropriate participant.
5. Click the **Encrypt Participant Name** button.
6. Click **OK** at the dialog box that appears.
   ***Note**: This is your last opportunity to abort. If you click OK, then the changes cannot be reversed.
   ****Note**: After clicking OK and after the form refreshes, notice how the First Name and the Last Name are randomly generated number.
   *****Note:** The birth date does not become encrypted.



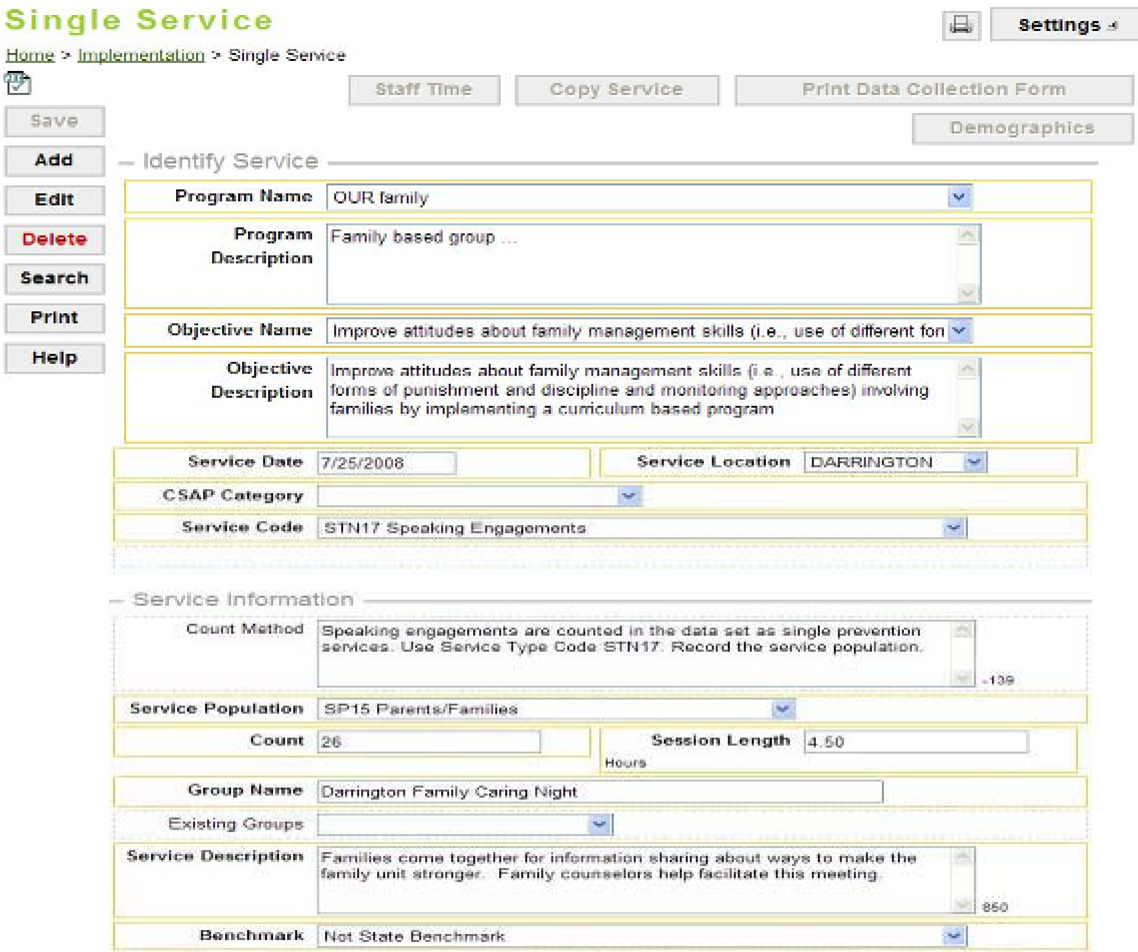
Adding a New Single Service

1. Click **Implementation** in the Menu.
2. Click **Singe Service** in the Sub-Menu.
3. Click **Add** in the Task Pane.
4. Select a program from the **Program*** drop down menu.
   ***Note:** the Program Description will automatically be filled in based on the chosen Program.
   ***Note:** The Objective Name and Objective Description will automatically be filled in based on the chosen Program.
5. Enter the actual date of the service (mm/dd/yy) in the **Service Date*** field.
6. Select the location in which the event will take place in the **Service Location*** drop down menu.
7. Select the CSAP Category from the **CSAP Category** drop down menu.
8. Select the Service Code from the **Service Code*** drop down menu.
   ***Note:** the Count Method will automatically be filled in based on the chosen Service Code.
9. Select the Service Population* from the **Service Population*** drop down menu.
10. Enter the number of units being counted (that appear in the Count Method data field) in the **Count*** text field.
11. Enter the length of the Single Service (hours in decimal form) in the **Session Length*** text field.
    ***Note:** The Session Length should not include planning time.

2 Hours 15 Minutes = 2.25 Hours
2 Hours 30 Minutes = 2.50 Hours
2 Hours 45 Minutes = 2.75 Hours

12. Enter a descriptive name of the group in the **Group Name*** text field.
    ***Note**: After the Single Service form is saved, the Group Name will appear in future Single Service forms under the drop down menu Choose Existing Groups.
13. Type the service description in the **Service Description*** text field.
14. Select an appropriate **Benchmark*.** If none are appropriate select NOT STATE BENCHMARK.
15. Click **Save** or **Cancel** in the Task Pane.

***Note:** After saving the Single Service, the Staff Service Time form will appear.



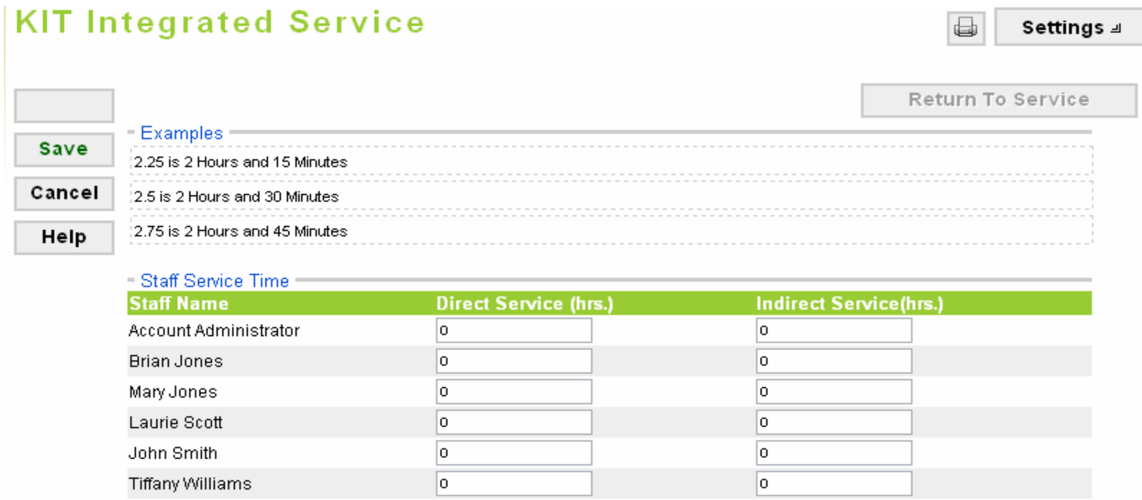
Single Service Staff Service Time Reporting

1. Record the Service time for each staff member that contributed to this service. You do not need to click on Add or Edit, just type the **Direct and Indirect Staff Service Time** in the columns to the right. There may not be Indirect Staff Service Time for each individual.
   ***Note:**

2 Hours 15 Minutes = 2.25 Hours
2 Hours 30 Minutes = 2.50 Hours
2 Hours 45 Minutes = 2.75 Hours

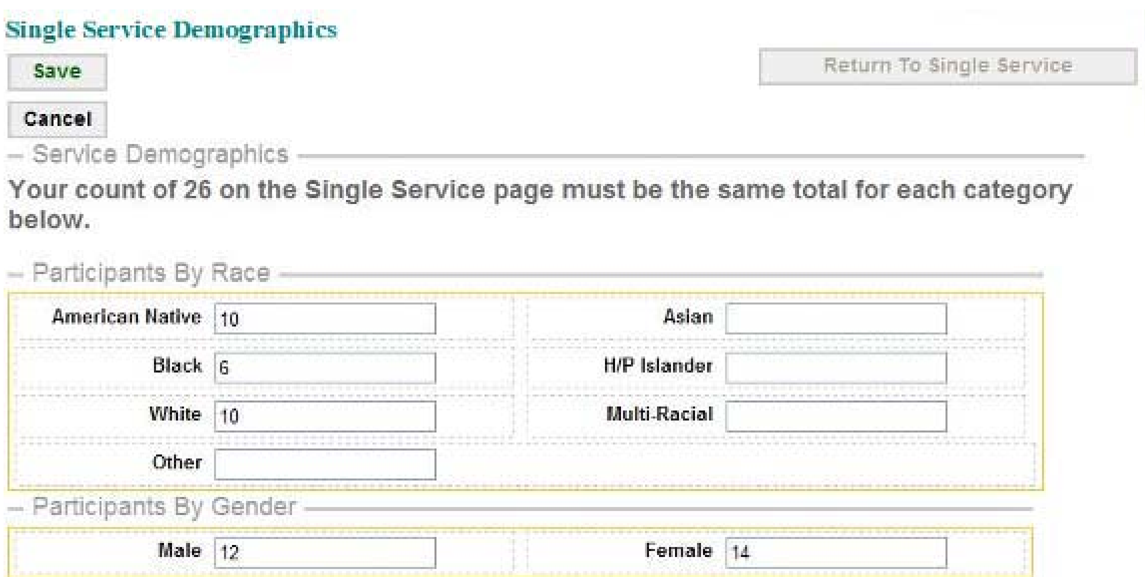
   ****Note:** Direct Service Time is the same as the session length.
   *****Note:** Indirect Service Time is the time that went into planning, preparing, coordinating, and reporting the service; basically the total time minus the session length.

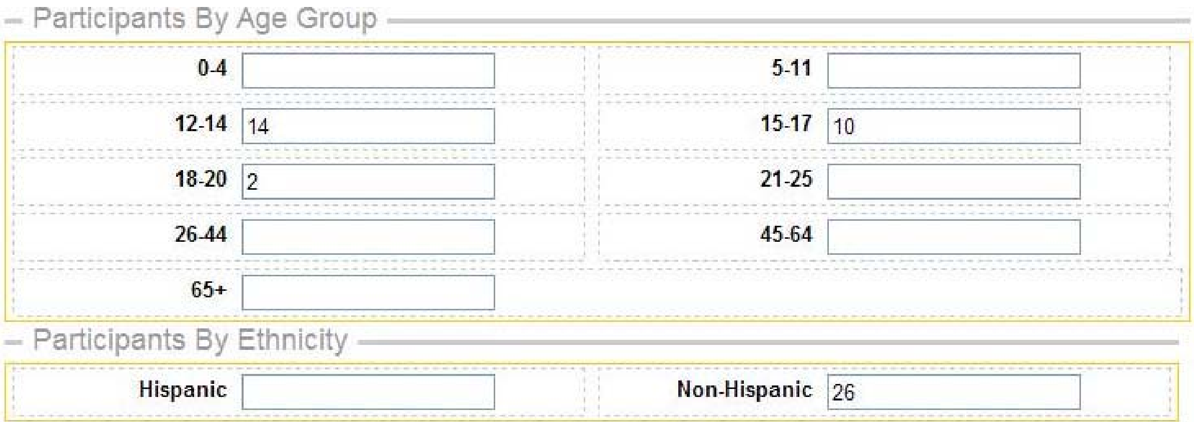
2. Click the **Save** button when finished, and you will automatically go to the **Service Demographics** reporting screen.



Single Service Demographics Time Reporting

1. Record the **Service Demographics** for each Single Service entry. You do not need to click on Add or Edit, just enter the demographic information in each category. The total for each demographic category must match the count on the Single Service Screen.





2. Click the **Save** button when finished.
3. Click the **Return to Service** button if you wish to add another Single Service.
   Note:** Since the service has been added to the PBPS, you can now duplicate the service for future repetitions by clicking the **Copy Service** button so that you do not enter each service entry again. You will be forced to give a new **Servcice Date and **Session Length*,** while having an opportunity to change the other fields as well.

Using the Copy Service Button

1. Click the **Implementation** tab in the Menu Bar.
2. Click the **Single Service** in the Sub-Menu
3. Click **Search** in the Task Pane
4. Click **Select** to choose the entry to copy
5. Click the **Copy Service** tab
6. Complete entries in:
   a. Service Date
   b. Session Length
   c. Count if Changed
7. Click **Save**
8. Continue Staff Service Time and Single Service Demographics entry.

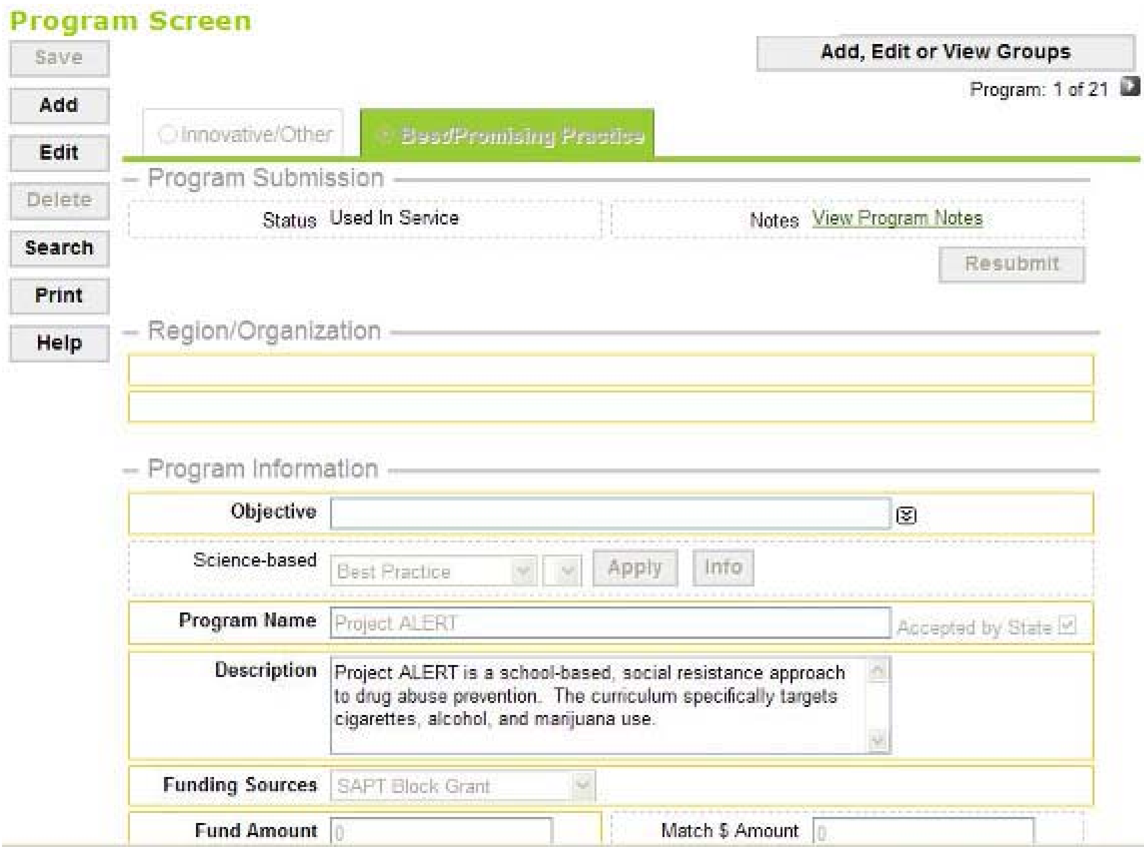
Deleting a Single Service

1. Click the **Implementation** tab in the Menu bar.
2. Click the **Single Service** in the Sub-Menu.
3. Click **Search** in the Task Pane.
4. Click the **Select** to choose the service to delete.
5. Click the **Delete** button in the Task Pane.
6. Confirm the Delete request.

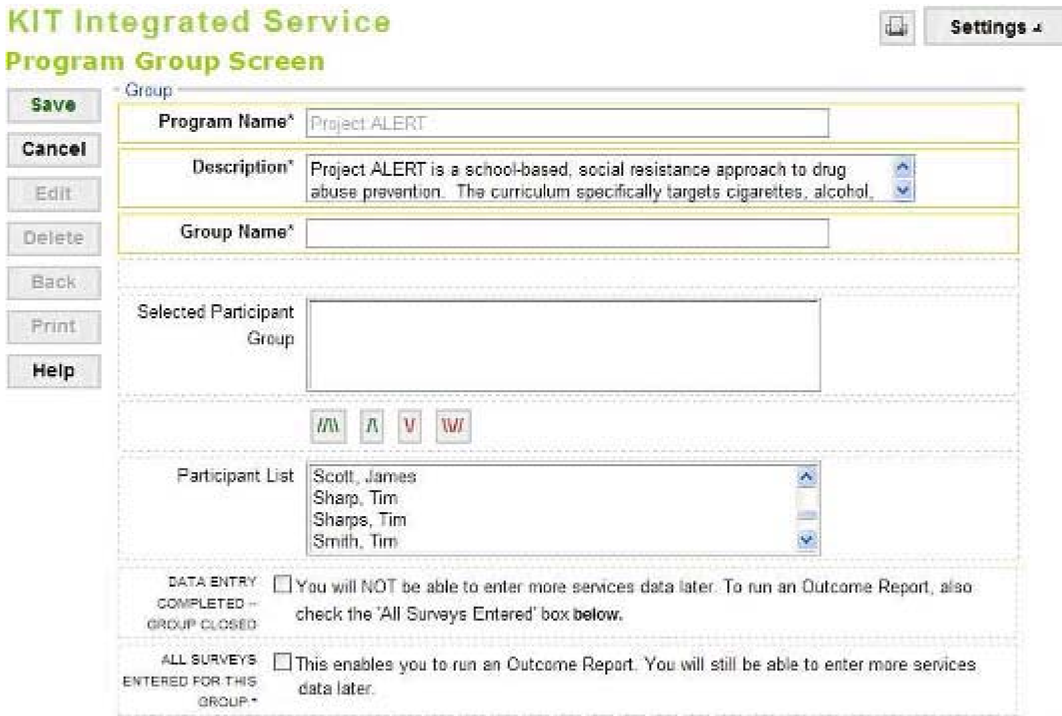
Creating a Group and Adding it to a Program

In the PBPS, group management was designed to make Recurring Services easy to track and record. To each Recurring Service, a program and group must be associated. Each group is composed of designated participants upon which the service will be performed. So, when you associate a Recurring Service with a group, all the participants of that group are associated with the Recurring Service. Groups can be modified on the fly - a participant can be added at any time or removed only if the service has not commenced. When adding a new participant to the PBPS you may assign them to particular groups.

1. Click **Planning** in the Menu.
2. Click the **Program** link in the Sub-Menu
3. Click the **Select** button to the program to which you would like to add a group.
4. Click the **Add, Edit or View Groups** button.



5. Click **Add** in the Task Pane.



6. Type a unique and descriptive Group Name in the **Group Name*** text field.
   ***Note:** No two groups may share the same name.
7. Select participants from the Participant List and click the buttons to add or remove participants from the Participant List. You do not have to add participants to the group at this time.
   ***Note:** Clicking the single arrow up or down will move only the selected participant into or out of your group. If you want every participant in the participant list added use the double up arrow. If you want every participant removed from your group, use the double down arrow.
   ***Note:** If you want a participant who has not yet been added to the PBPS (not present in the Participant List) to be added to this group, you may do so after you add the Participant in the Participant Screen.
8. Click **Save** or **Cancel** in the Task Pane.
   ***Note:** Notice below how the newly created group now appears in the Selected Participant Group drop down menu.

9. Check the box, **Data Entry Completed – Group Closed,** only if you have completed the program and the last service session has been entered. When you check this box the Group will not display on the Groups drop down for the program you are using; i.e. no need to see Groups in a list if you are finished with them. **ALSO**, check this box if you wish to run an Outcome Report.
10. Check the box, **All Surveys Entered For This Group**, if you wish to run an Outcome Report but haven't completed providing program services for this Group. You will still be able to continue entering services for this Group. Example: Perhaps this is a long term program and you wish to conduct a Post Test survey half way through the program, and then finish with a Follow-Up survey upon completion of the program.

Adding a New Recurring Service Series

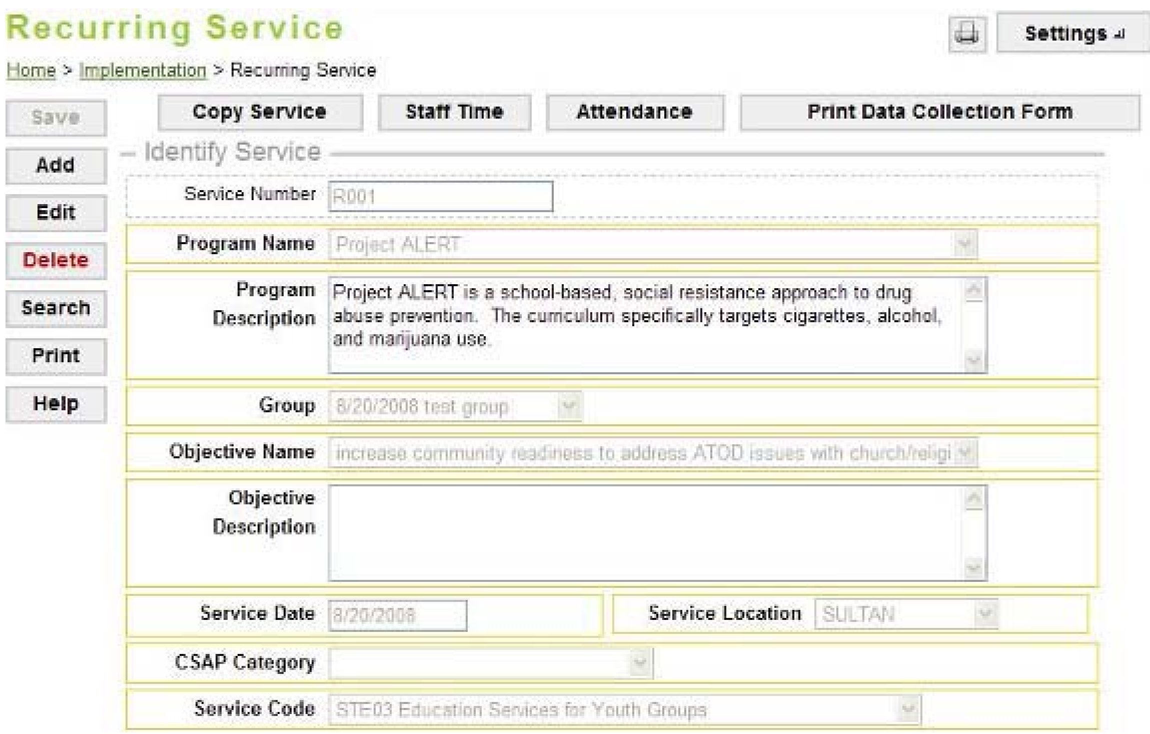
By adding a new recurring service series, you also add the first session. Subsequent sessions use the information entered in the steps below and therefore require less time to input than the first session.

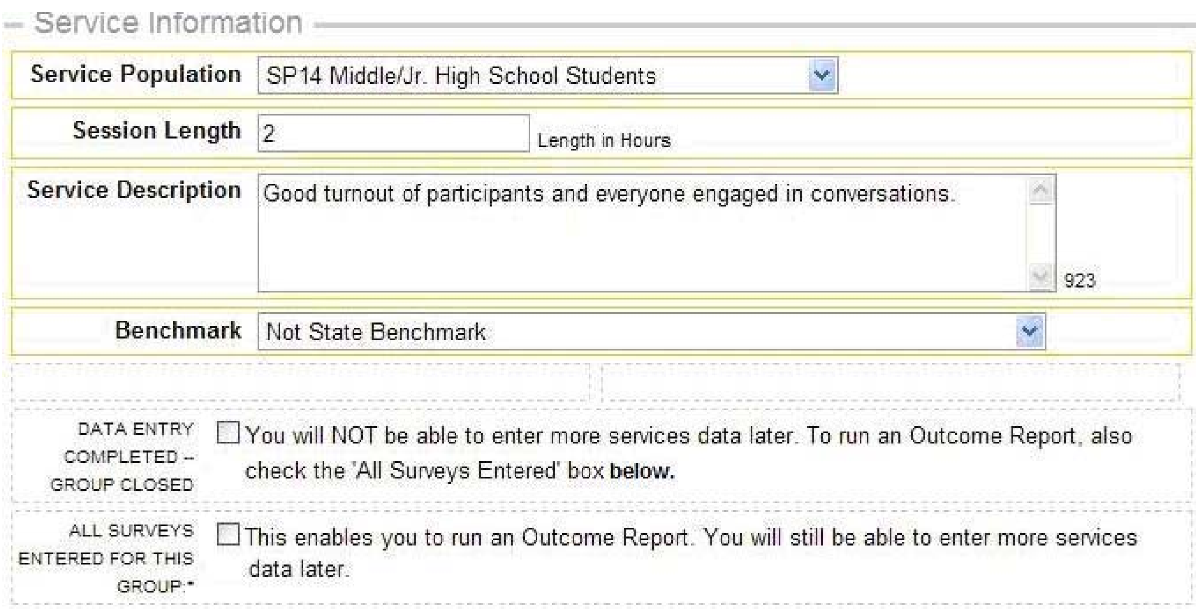
***Note:** You must have a Program Group with participants created before proceeding. Refer to the previous section, Creating a Group and Adding it to a Program.

1. Click **Implementation** in the Menu.
2. Click **Recurring Service** in the Sub-Menu.
3. Click **Add** in the Task Pane.
4. Select a program from the **Program*** drop down menu.
   ***Note:** The Program Description will automatically be filled in based on the chosen Program.
   ****Note:** The Objective and Objective Description may also be filled in based on the chosen Program.
5. Select the group name from the **Group*** drop down menu.
6. Enter the actual date of service (mm/dd/yy) in the **Service Date*** field.
7. Select the location the service will take place in the **Service Location*** drop down menu.
8. Select the CSAP Category from the **CSAP Category*** drop down menu.
9. Select the Service Code from the **Service Code*** drop down menu.
10. Select the Service Population* from the **Service Population*** drop down menu.
11. Enter the length of the Recurring Service (hours in decimal form) in the **Session Length*** text field.
    ***Note:** The Session Length should not include planning time.

2 Hours 15 Minutes	= 2.25 Hours
2 Hours 30 Minutes	= 2.50 Hours
2 Hours 45 Minutes	= 2.75 Hours

12. Enter a service description in the **Service Description*** text field.
13. Select an appropriate **Benchmark**. If none are appropriate select NOT STATE BENCHMARK.
14. Click **Save** or **Cancel** in the Task Pane.
    ***Note**: After saving the Recurring Service, the Staff Service Time form will automatically display.
15. Check the box, **Data Entry Completed – Group Closed,** <u>only</u> if you have completed the program and the last service session has been entered. When you check this box the Group will not display on the Groups drop down for the program you are using; i.e. no need to see Groups in a list if you are finished with them. <u>**ALSO**</u>, check this box if you wish to run an Outcome Report.
16. Check the box, **All Surveys Entered For This Group,** if you wish to run an Outcome Report but haven't completed providing program services for this Group. You will still be able to continue entering services for this Group. Example: Perhaps this is a long term program and you wish to conduct a Post Test survey half way through the program, and then finish with a Follow-Up survey upon completion of the program.



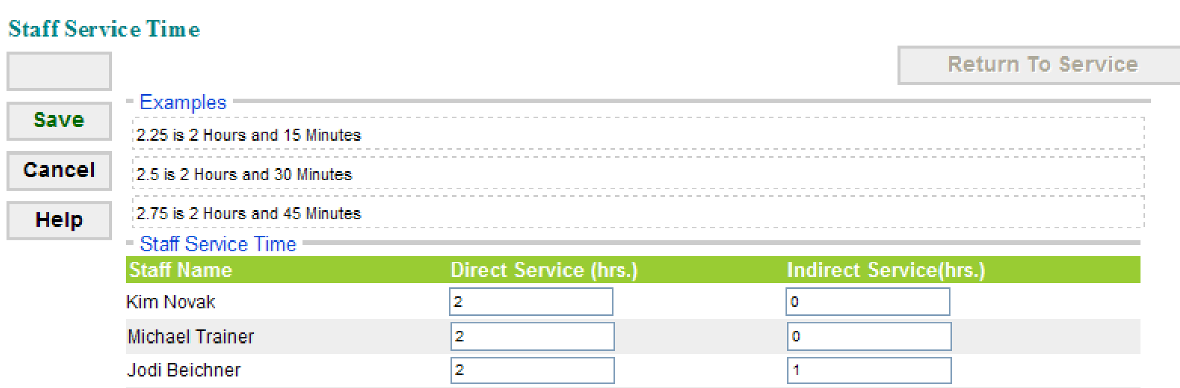


Recurring Service Staff Service Time Reporting

1. Record the Service time for each staff member that contributed to this service. You do not need to click on Add or Edit, just type the **Direct and Indirect Staff Service Time** in the columns to the right. There may not be Indirect Staff Service Time for each individual.
   Note:

2 Hours 15 Minutes	= 2.25 Hours
2 Hours 30 Minutes	= 2.50 Hours
2 Hours 45 Minutes	= 2.75 Hours

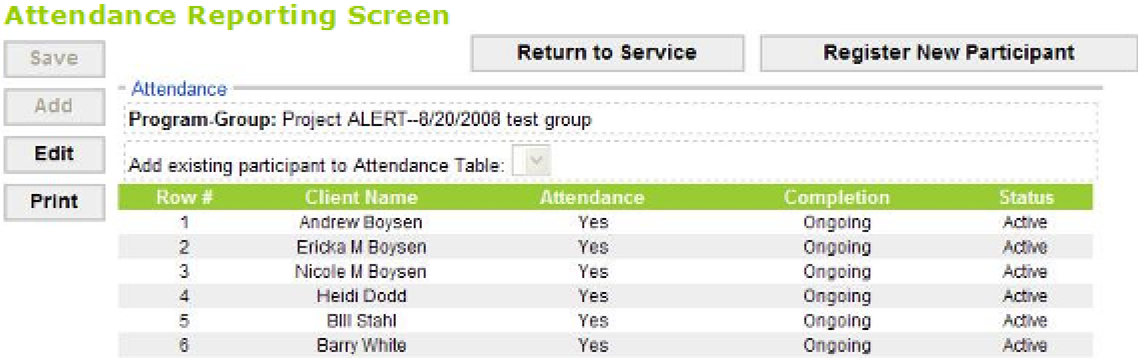
   Note: Direct Service Time is the same as the session length.
   Note: Indirect Service Time is the time that went into planning, preparing, coordinating, and reporting the service; basically the total time minus the session length.
2. Click the **Save** button when finished, and you will automatically go to the **Attendance reporting** screen.



Recurring Service Attendance Reporting

1. You do not need to click on Add or Edit, just make changes if necessary and click **Save.** Attendance defaults to YES, and Completion defaults to Ongoing.
2. You may add existing Participants from your Group list with the **Add Existing Participant To Attendance** drop down.
3. The **SET ATTENDANCE TO:** and **SET COMPLETION TO:** buttons allow complete toggling of the Attendance and Completion status that is displayed. Example; an after school drop-in program may have more participants that do not attend routinely, than those that do attend. This feature allows you to set the Attendance to NO for all participants and only change the YES cells that did attend, thus saving time.
4. Select the Yes or No in the **Attendance** drop down menu for changes if any.
5. Select Ongoing, Complete, or Withdrew in the **Completion** drop down menu if changes are needed.
6. Click **Save** or **Cancel** in the Task Pane.
7. If you want to add a participant, click **Register Participant** button.
8. Click the **Return to Service** button if you wish to add additional service entries.

Attendance Reporting Screen



Row #	Client Name	Attendance	Completion	Status
1	Andrew Boysen	Yes	Ongoing	Active
2	Ericka M Boysen	Yes	Ongoing	Active
3	Nicole M Boysen	Yes	Ongoing	Active
4	Heidi Dodd	Yes	Ongoing	Active
5	Bill Stahl	Yes	Ongoing	Active
6	Barry White	Yes	Ongoing	Active

Using the Copy Service Button

1. Click the **Implementation** tab in the Menu Bar.
2. Click the **Recurring Service** in the Sub-Menu
3. Click **Search** in the Task Pane
4. Click **Select** to choose the entry to copy
5. Click the **Copy Service** tab
6. Complete entries in:
    a. Service Date
    b. Session Length
    c. Count if Changed
7. Click **Save**
8. Continue Staff Service Time and Single Service Demographics entry.

Deleting a Recurring Service

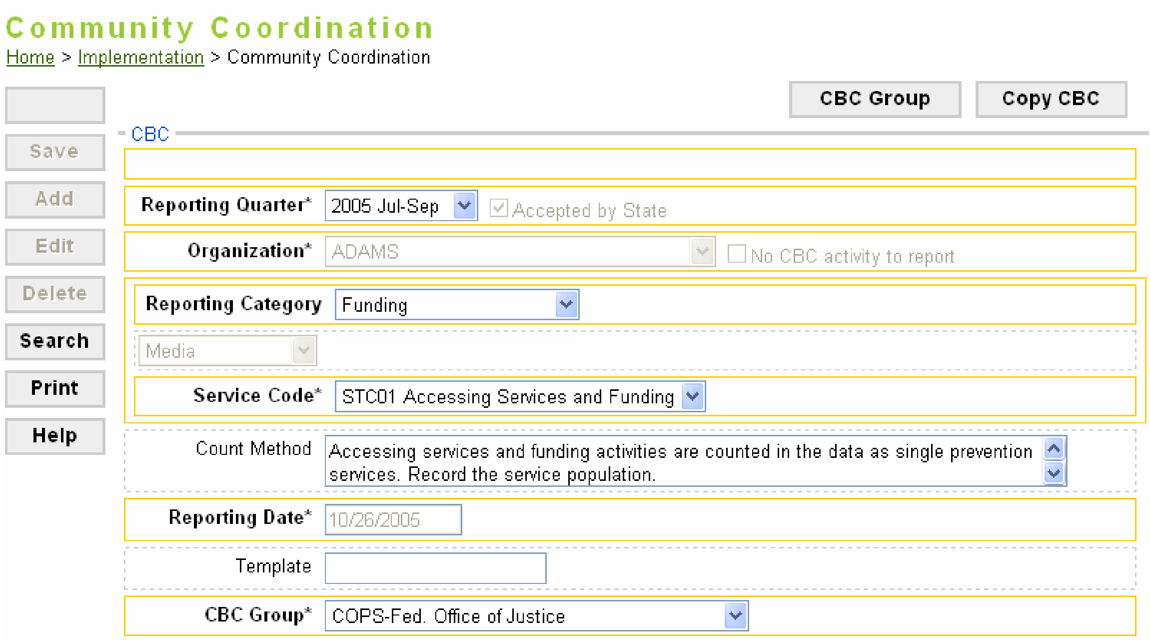
1. Click the **Implementation** tab in the Menu bar.
2. Click the **Recurring Service** in the Sub-Menu.
3. Click **Search** in the Task Pane.
4. Click the **Select** to choose the service to delete.
5. Click the **Delete** button in the Task Pane.
6. Confirm the Delete request.

Community Based Coordination (CBC)

The CBC portion of the PBPS was designed to record activities (that are not Services) performed by County Prevention Specialists that build the capacity and/or resources in a community. An example of this is prevention specialist who needs to document their time writing grants to earn money for the community. CBCs are required to report to DASA for at least one category each and every quarter.

Creating a CBC Group

1. Log-in to the PBPS.
2. Click **Implementation** in the Menu.
3. Click **Community Coordination** in the Sub-Menu.
4. Click the **CBC Group** button.
5. Click **Add** in the Task Pane.
6. Type a unique group name in the **Group Name*** text field.
   *Note: No two groups may share the same name.
7. Select a service population from the **Service Population*** drop down menu.
8. Click **Save** in the task pane to commit your changes.
   ***Note:** If you do not want to save your changes, click **Cancel**.
   *Note: The newly saved group will appear in the CBC group table.
9. Click **Return** in the task pane to go to the CBC form.



(Partial Screen Shot)

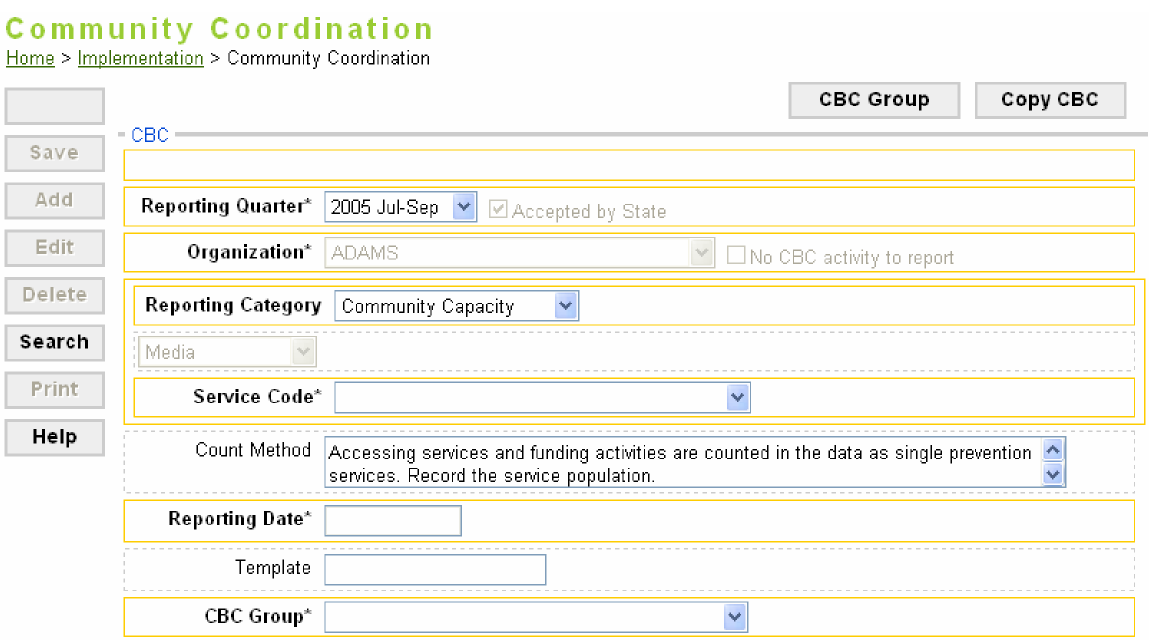
Quarterly Reporting – Community Capacity

*Note: You must create CBC groups before you can report quarterly.

1. Log-in to the PBPS.
2. Click **Implementation** in the Menu.
3. Click **Community Coordination** in the Sub-Menu.
4. Select the appropriate reporting period from the **Reporting Quarter*** drop down menu.
5. Select **Community Capacity** from the **Reporting Category*** drop down menu.
6. Select the appropriate service code from the **Service Code*** drop down menu.
   *Note: See Index of Services.
7. Click **Add** in the Task Pane.
8. Select the appropriate group from the **CBC Group*** drop down menu.
9. Type in the number of units being counted (that appear in the Count Method data field) in the **Count*** text field.
   *Note: the Count Method will automatically be filled in based on the chosen Service Code.
10. Type the length of time (hours in decimal form) spent in performing this category task in the **Total Length*** text field.
    *Note:

2 Hours 15 Minutes = 2.25 Hours
2 Hours 30 Minutes = 2.50 Hours
2 Hours 45 Minutes = 2.75 Hours

11. Type a description of the service in the **Service Description** text field.
12. Type a description of the benefits of the session in the **Describe the benefits or value of this work** text field.
13. Click **Save** in the task pane to commit your changes.
    ***Note:** If you do not want to save your changes, click **Cancel**.



(Partial Screen Shot)

Quarterly Reporting – Environmental Strategies

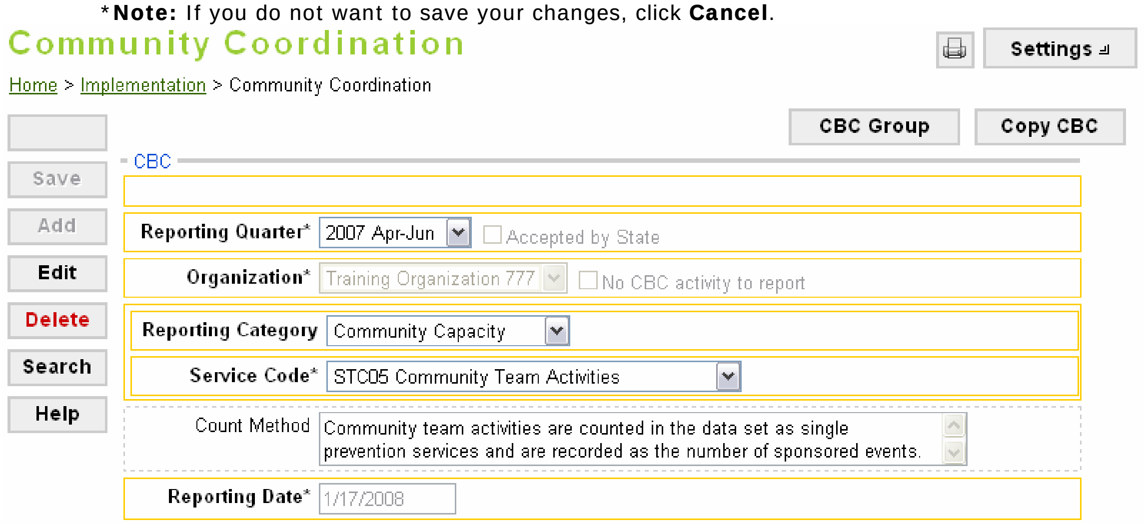
*Note: You must create CBC groups before you can report quarterly.

1. Log-in to the PBPS.

2. Click **Implementation** in the Menu.
3. Click **Community Coordination** in the Sub-Menu.
4. Select the appropriate reporting period from the **Reporting Quarter*** drop down menu.
5. Select **Environmental Strategies** from the **Reporting Category*** drop down menu.
6. Select the appropriate service code from the **Service Code*** drop down menu.
   *Note: See Index of Services.
7. Click **Add** in the Task Pane.
8. Select the appropriate group from the **CBC Group*** drop down menu.
9. Type in the number of units being counted (that appear in the Count Method data field) in the **Count*** text field.
   *Note: the Count Method will automatically be filled in based on the chosen Service Code.
10. Type the length of time (hours in decimal form) spent in performing this category task in the **Total Length*** text field.
    *Note:

2 Hours 15 Minutes = 2.25 Hours
2 Hours 30 Minutes = 2.50 Hours
2 Hours 45 Minutes = 2.75 Hours

11. Type a description of the service in the **Service Description** text field.
12. Type a description of the benefits of the session in the **Describe the benefits or value of this work** text field.
13. Click **Save** in the task pane to commit your changes.
    ***Note:** If you do not want to save your changes, click **Cancel**.



(Partial Screen Shots)

Quarterly Reporting – Funding

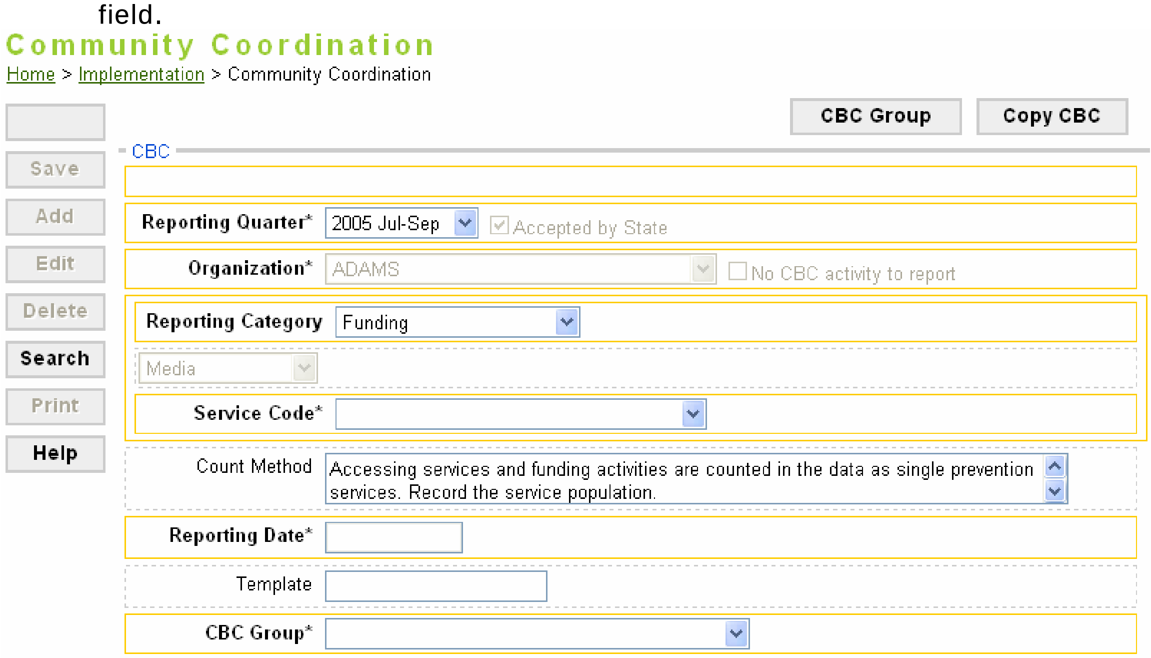
*Note: You must create CBC groups before you can report quarterly.

1. Log-in to the PBPS.
2. Click **Implementation** in the Menu.
3. Click **Community Coordination** in the Sub-Menu.
4. Select the appropriate reporting period from the **Reporting Quarter*** drop down menu.
5. Select **Community Capacity** from the **Reporting Category*** drop down menu.
6. Select the appropriate service code from the **Service Code*** drop down menu.
   *Note: See Index of Services.
7. Click **Add** in the Task Pane.
8. Select the appropriate group from the **CBC Group*** drop down menu.

9. Type in the number of units being counted (that appear in the Count Method data field) in the **Count*** text field.
   *Note: the Count Method will automatically be filled in based on the chosen Service Code.
10. Type the length of time (hours in decimal form) spent in performing this category task in the **Total Length*** text field.
   *Note:

2 Hours 15 Minutes = 2.25 Hours
2 Hours 30 Minutes = 2.50 Hours
2 Hours 45 Minutes = 2.75 Hours

11. Type a description of the service in the **Service Description** text field.
12. Type a description of the benefits of the session in the **Describe the benefits or value of this work** text field.
13. Click **Save** in the task pane to commit your changes.
   ***Note:** If you do not want to save your changes, click **Cancel**.
14. Type the title of the grant or donation in the **Grant/Donation Title** text field.
15. Type the amount of funding received by the above specified grant or donation in the **Grant/Donation $ Received** text field.
16. Type the amount of funding that your country/tribe is contributing to this program in the **$ Value Matched** text field.
17. Check the checkbox next to **Is your agency the Fiscal Agent?** if it is true.
18. Type a description of the funding source in the **Grant/Donation Partner** text field.



(Partial Screen Shot)

Quarterly Reporting – Media

*Note: You must create CBC groups before you can report quarterly.

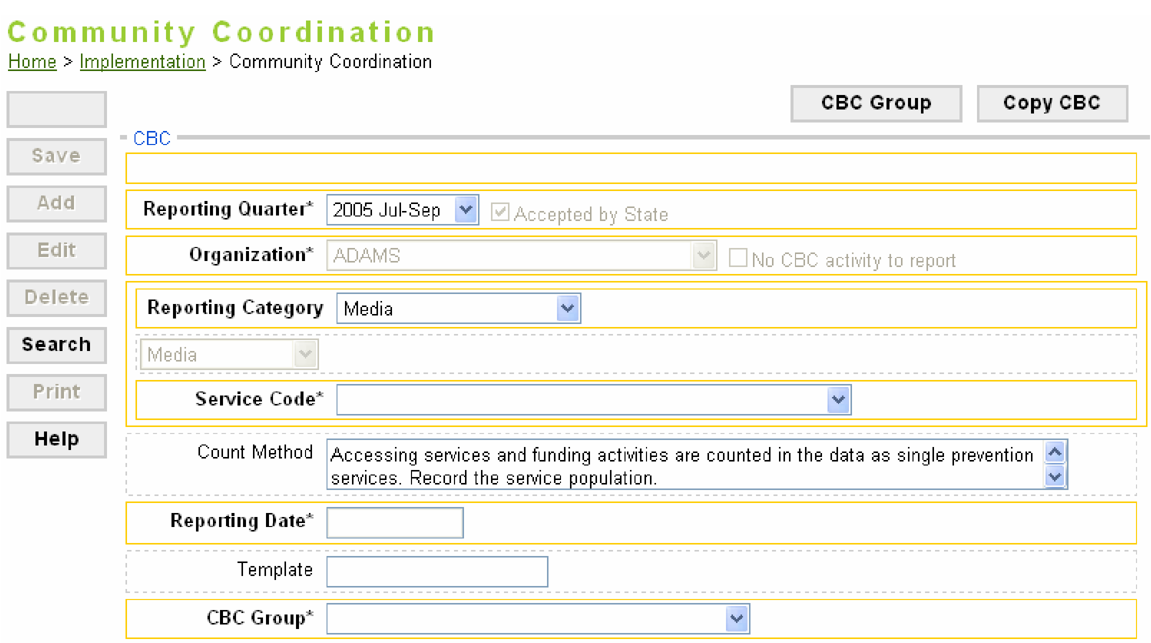
1. Log-in to the PBPS.
2. Click **Implementation** in the Menu.
3. Click **Community Coordination** in the Sub-Menu.
4. Select the appropriate reporting period from the **Reporting Quarter*** drop down menu.
5. Select **Community Capacity** from the **Reporting Category*** drop down menu.
6. Select the appropriate service code from the **Service Code*** drop down menu.

*Note: See Index of Services.

7. Click **Add** in the Task Pane.
8. Select the appropriate group from the **CBC Group*** drop down menu.
9. Type in the number of units being counted (that appear in the Count Method data field) in the **Count*** text field.
   *Note: the Count Method will automatically be filled in based on the chosen Service Code.
10. Type the length of time (hours in decimal form) spent in performing this category task in the **Total Length*** text field.
   *Note:

2 Hours 15 Minutes = 2.25 Hours
2 Hours 30 Minutes = 2.50 Hours
2 Hours 45 Minutes = 2.75 Hours

11. Type a description of the service in the **Service Description** text field.
12. Type a description of the benefits of the session in the **Describe the benefits or value of this work** text field.
13. Type the media type used in the **Type of Media Used** text field.
14. Type the number of days the media campaign ran in the **Number of Days** text field.
15. Type the estimated number of people the media campaign reached in the **Number of Days** text field.
16. Type the number of days the media campaign ran in the **Number of People Reached** text field.
17. Type the estimated cost of the media campaign in the **Estimated $ Value** text field.
18. Click **Save** in the task pane to commit your changes.
   ***Note:** If you do not want to save your changes, click **Cancel**.



(Partial Screen Shot)

Copy CBC Button

Once the CBC has been added to the PBPS, you can now duplicate the CBC for future repetitions by clicking the **Copy CBC** button so that you do not enter the CBC again into the PBPS. You will be forced to change the **CBC Group***, while having an opportunity to change the other fields as well.

*Note: This is very similar to the Single Service "Copy Service Button" (See Services).

1. Log-in to the PBPS.
2. Click **Implementation** in the Menu.
3. Click **Community Coordination** in the Sub-Menu.
4. Select the appropriate reporting period from the **Reporting Quarter*** drop down menu.
5. Select the appropriate reporting category from the **Reporting Category*** drop down menu.
6. Select the appropriate service code from the **Service Code*** drop down menu.
   *Note: See Index of Services.
7. Click the **Copy CBC** button.
8. Make changes to the form.
9. Click **Save** in the task pane to commit your changes.
   ***Note:** If you do not want to save your changes, click **Cancel**.

- OR -

1. Log-in to the PBPS.
2. Click **Implementation** in the Menu.
3. Click **Community Coordination** in the Sub-Menu.
4. Click **Search** in the Task Pane.
5. Click **Show All** or select the search criteria.
6. Click the **Select** button for the desired quarter.
7. Click the **Copy CBC** button.
8. Make changes to the form.
9. Click **Save** in the task pane to commit your changes.
   ***Note:** If you do not want to save your changes, click **Cancel**.

Mentoring

Before any mentoring services can be recorded, you must

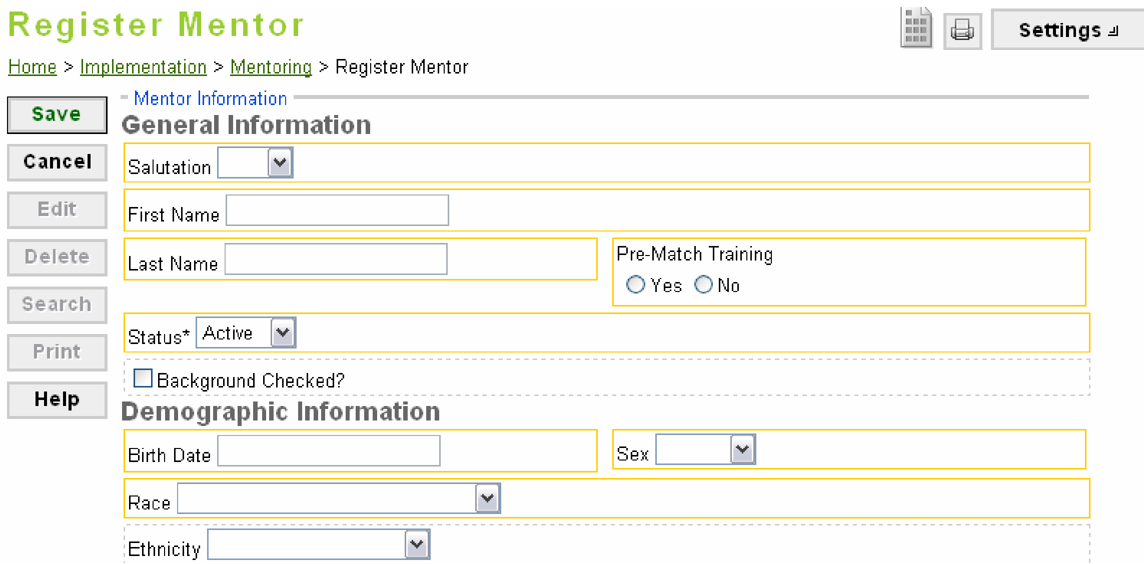
- Register Mentors
- Register Mentees (if they are not already participants in the PBPS.)
  Note:** If the Mentee is already a registered participant, then you need to select Yes in the **Mentoring drop down menu in the participant screen. See Editing Participants)
- Create the Mentor/Mentee Match

Mentoring Services are divided into three categories.

Type	Description
Mentor Services	Records any one-to-one services, including the actual Mentor-Mentee match time, or program staff time with the Mentee, Mentor or Mentee's family.
Group-Support Activities	Records any supportive activities that occur with groups of Mentors or Mentees, such as group orientations, trainings, or mentor support groups.
Group-Match Activities	Records other types of group activities, usually with groups of Mentors and Mentees together, such as group recreational activities.

Registering Mentors

1. Click **Implementation** tab in the Menu.
2. Click **Register Mentors** link in the Sub-Menu.
3. Click **Add** in the Task Pane.
4. Make changes to the form.
   ***Note**: Mentoring research has shown that mentoring is more effective when the Mentors receive mentor training prior to being matched to their mentee.
5. Click **Save** or **Cancel** in the Task Pane.

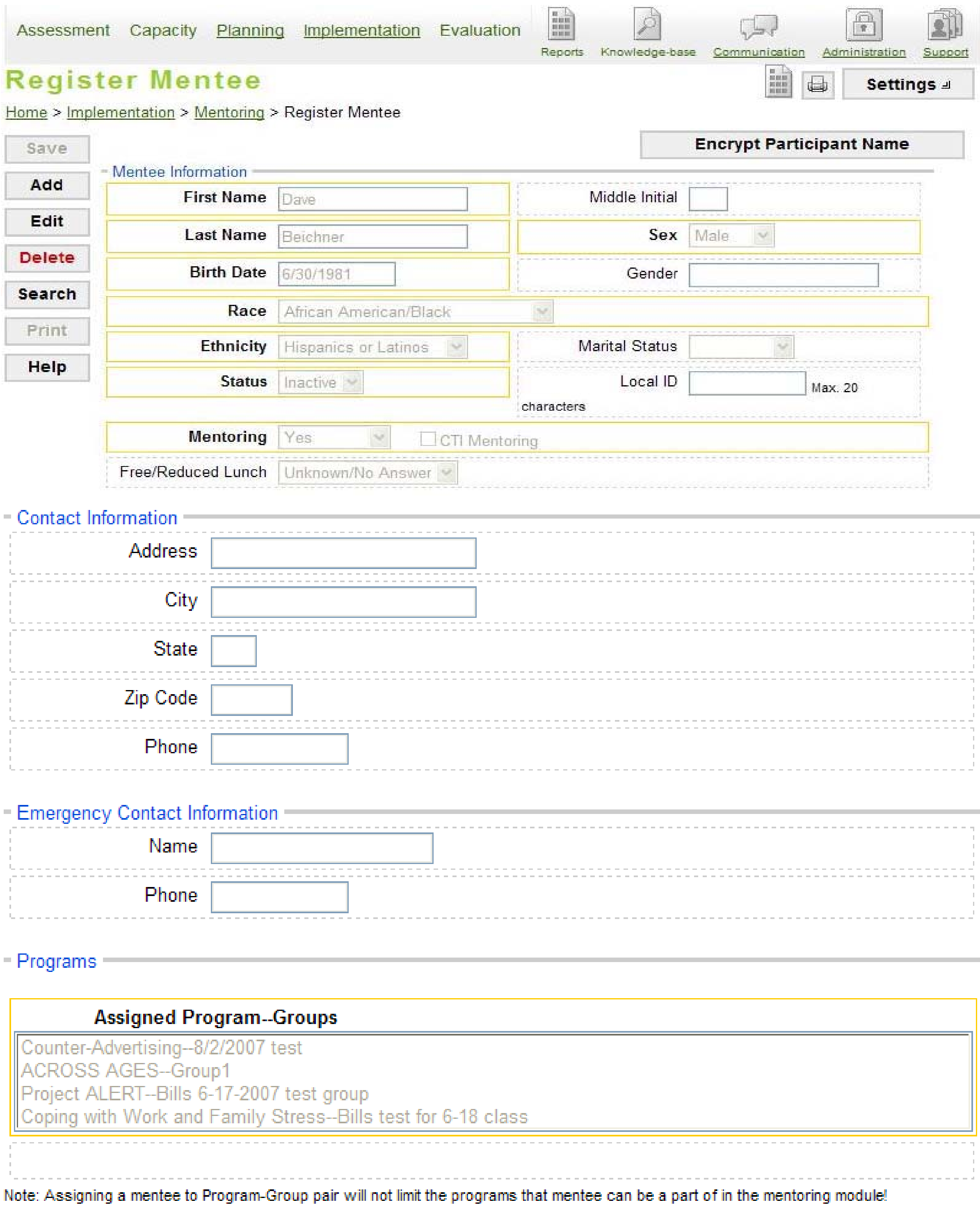


Registering Mentees

Mentees should be registered in the Register Mentee screen only if they are not already registered participants in the PBPS. All mentees are participants, but not all participants are mentees. Please check the Participant List (using the search feature) to confirm the mentee is not already registered as a participant.

Note:** If the mentee is already a registered participant, then you need to select Yes in the **Mentoring drop down menu in the participant screen. See Editing Participants.)

1. Click **Implementation** in the Menu.
2. Click **Register Mentee** in the Sub-Menu.
3. Click **Add** in the Task Pane.
4. Make changes to the form.
5. Select a group from the **Available Program-Groups** data field.
   Note:** The programs that appear in the **Assigned Program-Groups** data field are those programs that have selected Yes to the **Mentoring drop down menu in the program screen.
   ****Note:** If your program does not appear here, then you need to select Yes in the **Mentoring*** drop down menu in the program screen (see Adding Innovative/Other Programs). If you are a Direct Services Provider and Yes is not labeled in the program screen, see your County Prevention Specialists.
6. Click the Up Arrow (^) button to assign selected group.
   ***Note:** If you make a mistake, click the erroneous **Assigned Program-Group** and click the Down Arrow (⌄) button to remove group assignment.
7. Click **Save** or **Cancel** in the Task Pane.

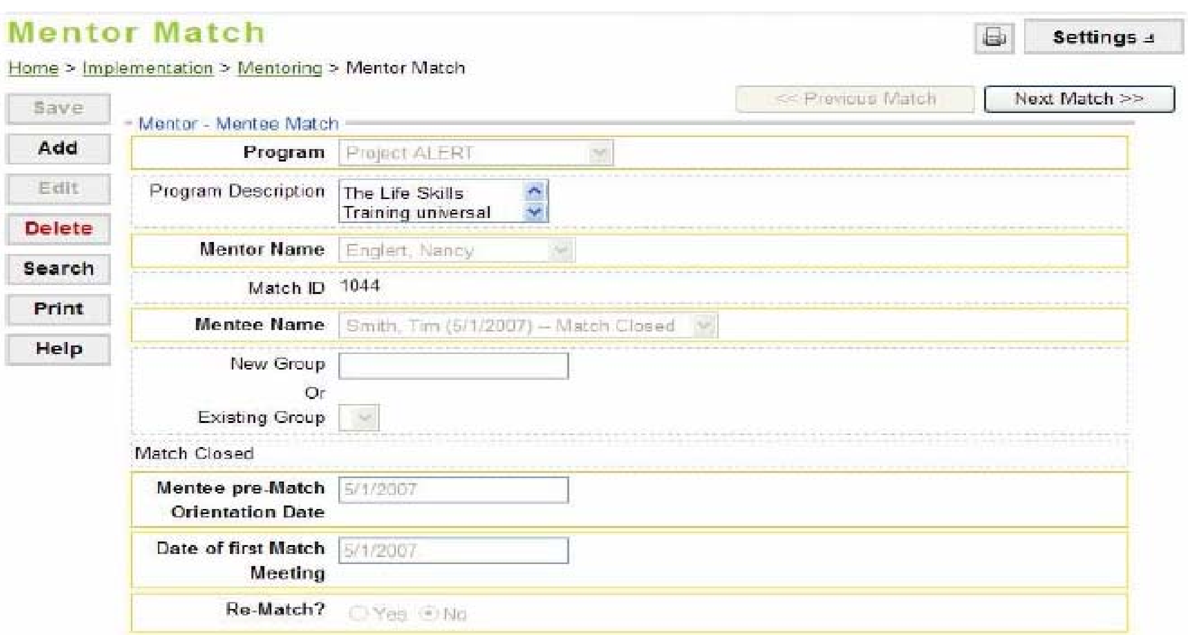

Assessment
Capacity
Planning
Implementation
Evaluation
Reports
Knowledge-base
Communication
Administration
Support
Register Mentee
Settings
Home > Implementation > Mentoring > Register Mentee
Save
Add
Edit
Delete
Search
Print
Help
Encrypt Participant Name
Mentee Information
First Name
Dave
Middle Initial
Last Name
Beichner
Sex
Male
Birth Date
6/30/1981
Gender
Race
African American/Black
Ethnicity
Hispanics or Latinos
Marital Status
Status
Inactive
Local ID
Max. 20 characters
Mentoring
Yes
CTI Mentoring
Free/Reduced Lunch
Unknown/No Answer
Contact Information
Address
City
State
Zip Code
Phone
Emergency Contact Information
Name
Phone
Programs
Assigned Program--Groups
Counter-Advertising--8/2/2007 test
ACROSS AGES--Group1
Project ALERT--Bills 6-17-2007 test group
Coping with Work and Family Stress--Bills test for 6-18 class
Note: Assigning a mentee to Program-Group pair will not limit the programs that mentee can be a part of in the mentoring module!

Creating the Mentor/Mentee Match

A unique id number is given to each mentor/mentee match (including rematches). A mentee can only have one mentor while a mentor can have multiple mentees. If a mentor/mentee match does not work you must close a match before the mentee can be re-matched to a new mentor. In all matches, the primary reference point is the mentor (and the secondary is the mentee).

***Note:** If you are trying to search for a match, you will need to select the mentor first, and then the matched mentees will appear.

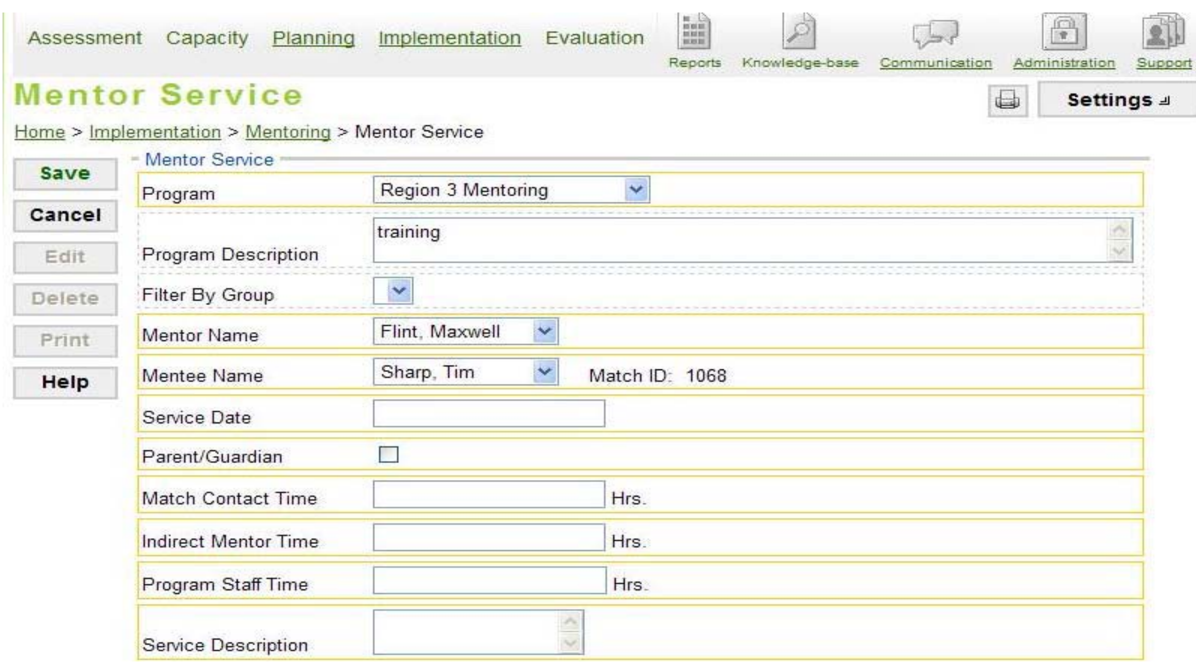
1. Click **Implementation** in the Menu.
2. Click **Mentor Match** in the Sub-Menu.
3. Click **Add** in the Task Pane.
4. Select a program from the **Program*** drop down menu.
   ***Note:** The Program* drop down menu is populated by programs that have the category "Mentoring". This setting is apart of the Adding Innovative/Other Programs or Adding Best/Promising Programs.
   ****Note:** The Program Description will be automatically filled in by the PBPS based on the Program chosen.
5. Select a mentor from the **Mentor Name*** drop down menu.
6. Select a mentee from the **Mentee Name*** drop down menu.
   ***Note:** Only the available (not yet matched) menetees will appear in the mentee drop down menu.
   Note:** If your mentee does not appear here, then you need to select Yes in the **Mentoring drop down menu in the Participant screen (see Editing Participants).
7. Select from the **Existing Group** you created when you registered your mentee, or enter a **New Group** name if none was created.
8. Type the date the mentee (and, if applicable, mentees family) received training in the **Mentee pre-Match Orientation***.
9. Type the date the mentor and mentee met for the first time in the **Date of first Match Meeting***.
10. Click the Yes radio button for **Re-Match*** if the mentee is being Re-Matched.
11. Click **Save** or **Cancel** in the Task Pane.
12. Click [Next Match >>] if you wish to continue assigning matches.



Adding the Initial Mentor Service

The Mentor Service screen is set up to capture all individual service data related to the match. This could include case management work with the mentees family, or problem-solving meetings between program staff and the mentor without the mentee, or other similar variations, that might not include actual match contact time. The Mentor Service Time fields are mandatory fields and must be filled in, but zero (0) is an option when not applicable.

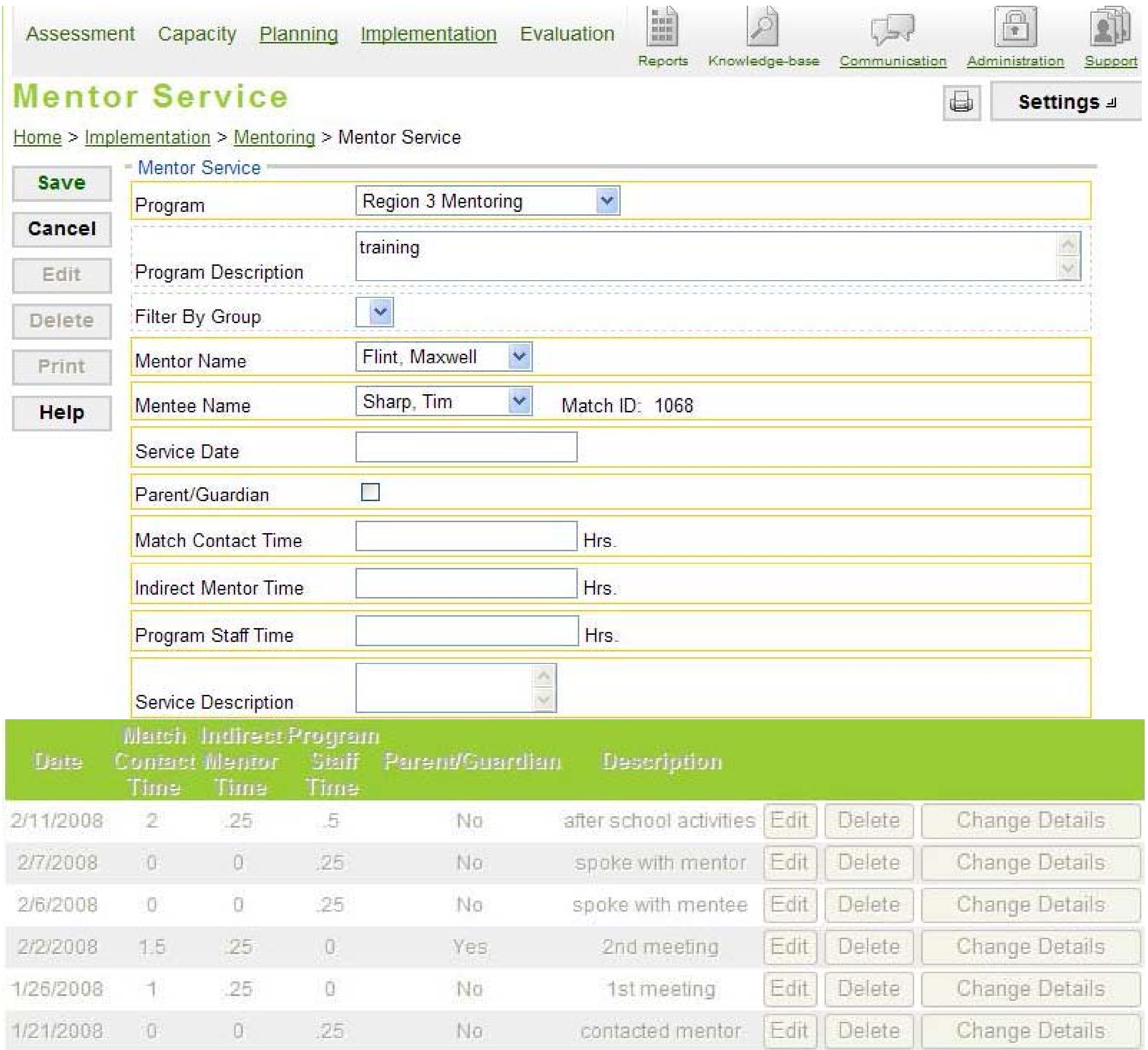
1. Click **Implementation** in the Menu.
2. Click **Mentor Service** in the Sub-Menu.
3. Click **Add** in the Task Pane.
4. Select the program from the **Program*** drop down menu.
   ***Note:** the Program Description will automatically be filled in based on the chosen Program.
5. Click **Filter by Group** and select the group you assigned with your program when you created your Mentees.
6. Select the mentor in the **Mentor Name*** drop down menu.
   ***Note:** Expect a screens shift with the Task Pane staying at the top after you select your **Mentor Name**.
7. Select the mentee in the **Mentee Name*** drop down menu.
   Note:** The **Mentee Name drop down menu is populated by all the mentees that are attached to the mentor.
8. Type the service date in the **Service Date*** text field.
9. Check the check box next to **Parent/Guardian*** if a parent or guardian attended the service.
10. Type the direct time spent by mentor with the mentee in the **Match Contact Time** text field. If no direct time was spent, type 0 (zero).
11. Type the indirect time spent by the mentor in the **Indirect Mentor Time** text field. If no indirect time was spent, type 0 (zero).
    *Examples: time spent driving to match meeting, time spent with the program staff, etc.
12. Type the time spent by the program staff in the **Program Staff Time** text field. If no program staff time was spent, type 0 (zero).
13. Enter a service description in the **Service Description** text field.
14. Click **Save** or **Cancel** in the Task Pane.



Date	Match Contact Time	Indirect Mentor Time	Program Staff Time	Parent/Guardian	Description			
2/11/2008	2	.25	.5	No	after school activities	Edit	Delete	Change Details
2/7/2008	0	0	.25	No	spoke with mentor	Edit	Delete	Change Details
2/6/2008	0	0	.25	No	spoke with mentee	Edit	Delete	Change Details
2/2/2008	1.5	.25	0	Yes	2nd meeting	Edit	Delete	Change Details
1/26/2008	1	.25	0	No	1st meeting	Edit	Delete	Change Details
1/21/2008	0	0	.25	No	contacted mentor	Edit	Delete	Change Details

Adding the Subsequent Mentor Services

1. Click **Implementation** in the Menu.
2. Click **Mentor Service** in the Sub-Menu.
3. Select the Mentoring Program in the **Program** drop down menu.
4. Click **Filter by Group** and select the group you assigned with your program when you created your Mentees.
5. Select the mentor of the match in the **Mentor Name*** drop down menu.
6. Select the mentee of the match in the **Mentee Name*** drop down menu.
7. Click **Add** in the Task Pane
8. Type the service date in the **Service Date*** text field.
9. Check the check box next to **Parent/Guardian*** if a parent or guardian attended the service.
10. Type the direct time spent by mentor with the mentee in the **Match Contact Time*** text field. If no direct time was spent, type 0 (zero).
11. Type the indirect time spent by the mentor in the **Indirect Mentor Time*** text field. If no indirect time was spent, type 0 (zero).
    *Examples: time spent driving to match meeting, time spent with the program staff, etc.
12. Type the time spent by the program staff in the **Program Staff Time*** text field. If no program staff time was spent, type 0 (zero).
13. Enter a service description in the **Service Description*** text field.
14. Make changes to the rest of the form.
    ***Note:** The following fields will only need to be entered in this initial setup of the mentor service. IN subsequent service additions with this match, you will not have to fill out this information.
15. Click **Save** or **Cancel** in the Task Pane.
16. Click Next Match >> if you wish to continue assigning matches.

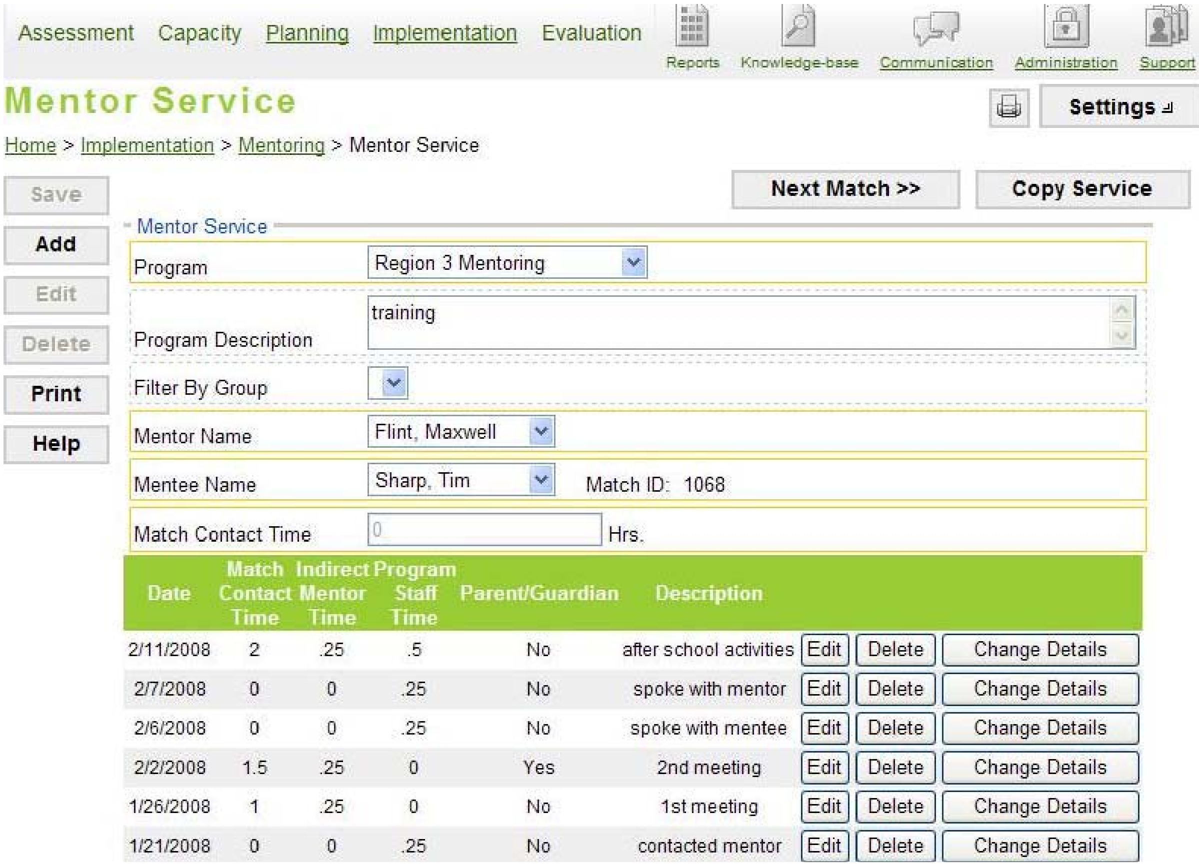


Viewing, Editing, & Deleting Existing Mentor Services

1. Click **Implementation** in the Menu.
2. Click **Mentor Service** in the Sub-Menu.
3. Select the Mentoring Program in the **Program** drop down menu.
4. Select the mentor of the match in the **Mentor Name** drop down.
5. Select the mentee of the match in the **Mentee Name** drop down.
6. Click one of the following buttons:

Button	**Description**
Edit	Change Contact Time, Indirect Time, Program Staff Time, and Parent/Guardian
Delete	Deletes the Record
Change Details	Objective, Obj. Description, Service Location, CSAP Category, Service Code, Service Population, and Benchmark of all the services of the match.

7. Make changes to the form.
8. Click **Save** or **Cancel** in the Task Pane.



Adding a New Group-Support Activity

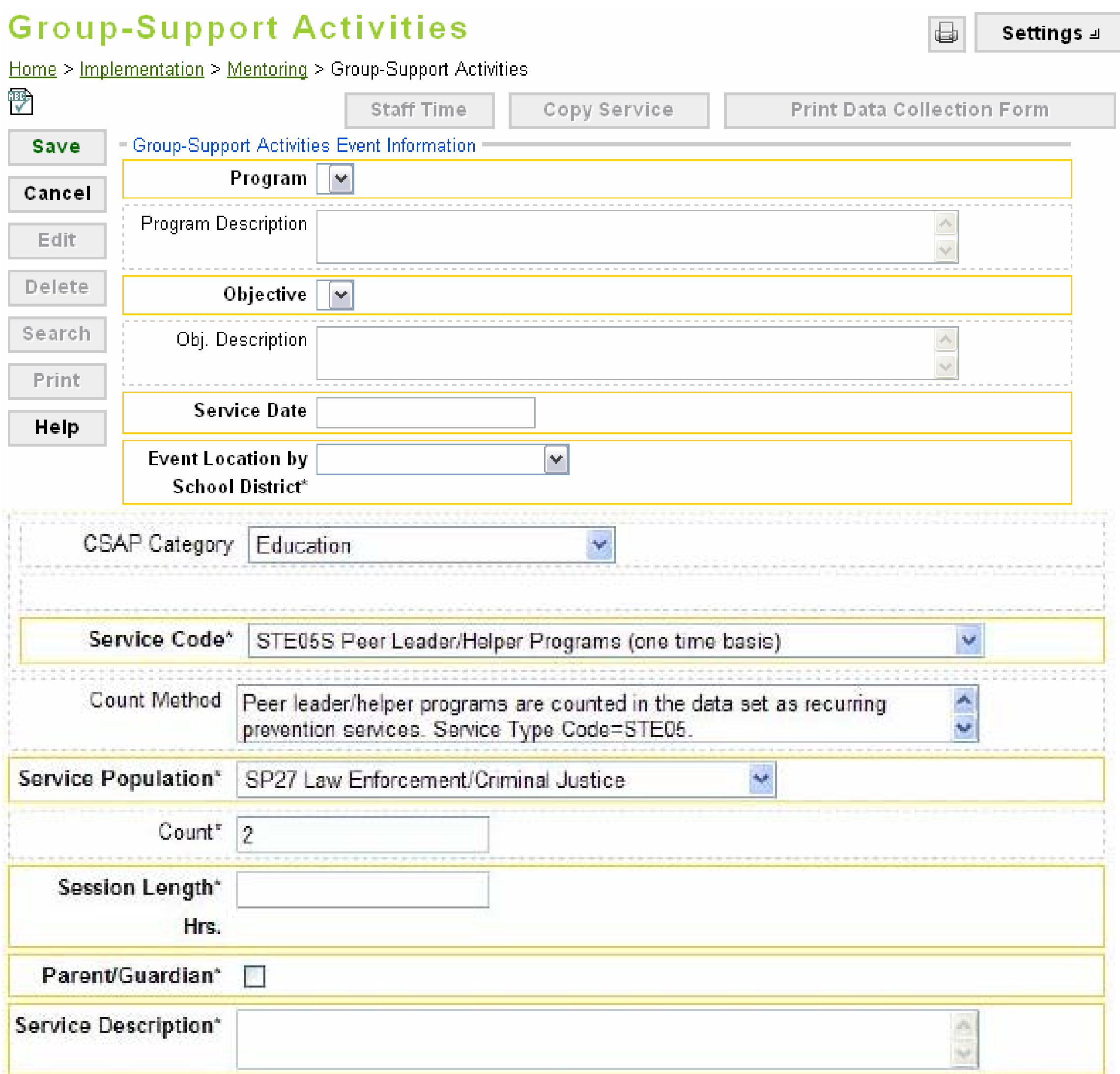
Group support activities are group events that offer support for mentors or mentees or mentees' families. Such events are Mentee Orientations, Mentor Trainings, or Group Support Meetings. Time spent between a mentor and mentee is not a Group-Support Activity.

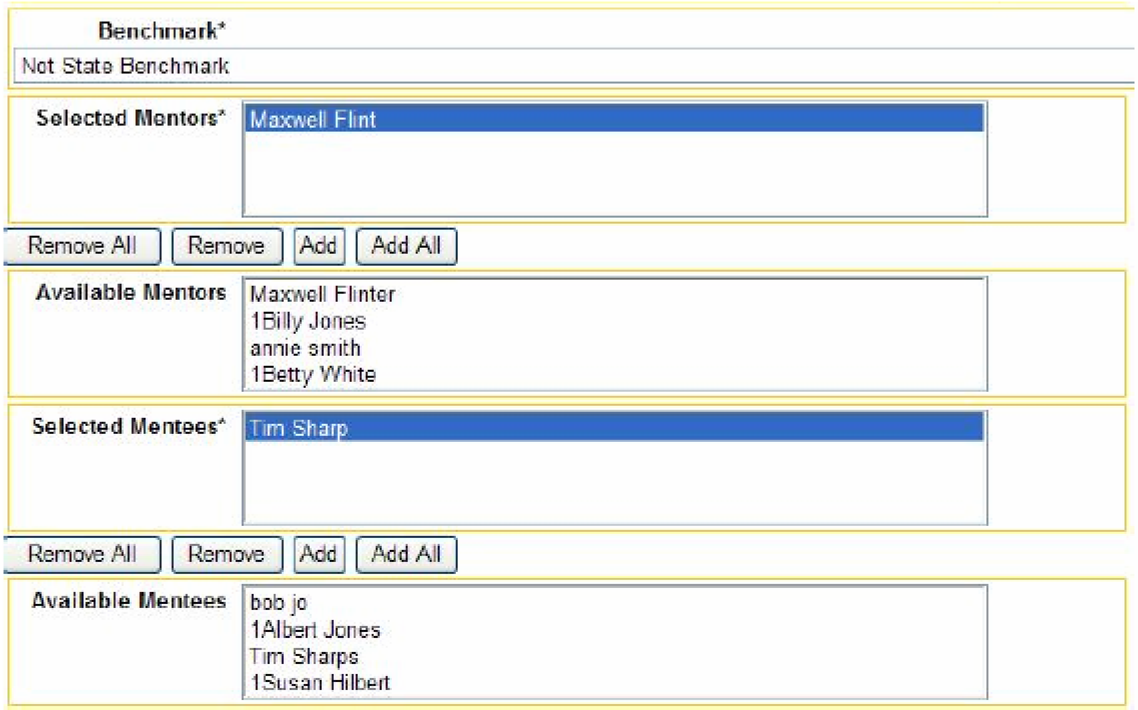
1. Click **Implementation** in the Menu.
2. Click **Group-Support Activities** in the Sub-Menu.
3. Click **Add** in the Task Pane.
4. Select a program from the **Program*** drop down menu.
   ***Note:** The Program Description will automatically be filled in based on the chosen Program.
5. Select and objective from the **Objective*** drop down menu.
   ***Note:** An Objective Description will automatically be filled in based on the chosen Objective.
6. Enter the date (mm/dd/yy) of service in the **Service Date*** field.
7. Select the school district in which the event will take place in the **Event Location by School District*** drop down menu.
   ***Note:** If multiple school districts are served by one event, use the district that has the most attendants.
8. Select the CSAP Category from the CSAP Category drop down menu.
   ***Note:** If you select the Information Dissemination CSAP Category, a Type drop down menu will appear after the screen refreshes.
9. Select the **Service Code*** from the Service Code drop down menu.
10. Select the Service Population from the **Service Population*** drop down menu.
11. Enter the number of units being counted (that appear in the Count Method data field) in the **Count** text field.
12. Enter the length of the activity (hours in decimal form) in the **Session Length*** text field.

***Note:** The Session Length should not include planning time.

2 Hours 15 Minutes	= 2.25 Hours
2 Hours 30 Minutes	= 2.50 Hours
2 Hours 45 Minutes	= 2.75 Hours

13. Check the check box next to **Parent/Guardian*** if a parent or guardian attended the service.
14. Type the service description in the **Service Description*** text field.
15. If applicable, select a benchmark that will be used to gauge the progress of the service in the **Benchmark*** drop down menu.
16. Select the attending mentees from the Available Mentees list and click the buttons to add mentees to the Select Mentees list.
    ***Note:** Clicking the **Remove All** button will remove all the Selected Mentees from the Selected Mentees list. Clicking the **Remove One** button will remove only the highlighted selected mentee from the Selected Mentees list. Clicking the **Add One** button will add the highlighted Available Mentee in the Available Mentees list will be added to the Selected Mentees list. Clicking the **Add All** button will add all the Available Mentees into the Selected Mentees list.
17. Click **Save** or **Cancel** in the Task Pane.





Adding a New Group-Match Activity

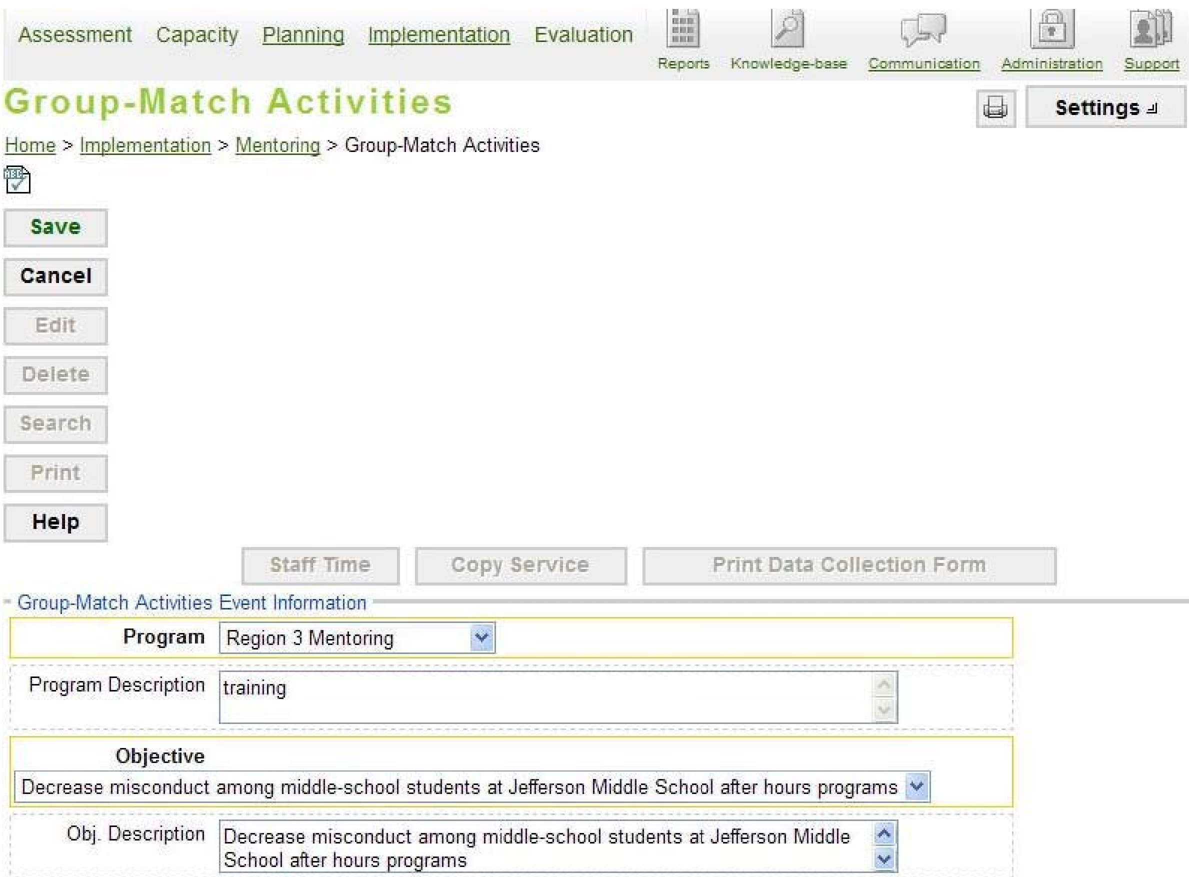
Group Match-Activities are coordinated by prevention specialists that gather a group of mentors and their mentees to attend recreational activities. Water park trips and laser tag outings are examples of Group-Match Activities.

1. Click **Implementation** in the Menu.
2. Click **Group-Match Activities** in the Sub-Menu.
3. Click **Add** in the Task Pane.
4. Select a program from the **Program*** drop down menu.
   ***Note:** the Program Description will automatically be filled in based on the chosen Program.
5. Select and objective from the **Objective*** drop down menu.
   ***Note:** An Objective Description will automatically be filled in based on the chosen Objective.
6. Type the date (mm/dd/yy) of service in the **Service Date*** field.
7. Select the school district in which the event will take place in the **Event Location by School District*** drop down menu.
   ***Note:** If multiple school districts are served by one event, use the district that has the most attendants.
8. Select the CSAP Category from the **CSAP Category** drop down menu.
   ***Note**: If you select the Information Dissemination CSAP Category, a Type drop down menu will appear after the screen refreshes.
9. Select the Service Code from the **Service Code*** drop down menu.
   ***Note:** See Index of Services.
10. Enter the length of the Single Service (hours in decimal form) in the **Session Length*** text field.
    ***Note**: The Session Length should not include planning time.

2 Hours 15 Minutes = 2.25 Hours
2 Hours 30 Minutes = 2.50 Hours
2 Hours 45 Minutes = 2.75 Hours

11. Check the check box next to **Parent/Guardian*** if the mentees parent(s) or guardian(s) attended the service.

12. Type the service description in the **Service Description*** text field.
13. If applicable, select a benchmark that will be used to gauge the progress of the service in the **Benchmark*** drop down menu.
14. Select the attending mentees from the Available Mentees list and click the buttons to add mentees to the Select Mentees list.
    ***Note**: Clicking the **Remove All** button will remove all the Selected Mentees from the Selected Mentees list. Clicking the **Remove One** button will remove only the highlighted selected mentee from the Selected Mentees list. Clicking the **Add One** button will add the highlighted Available Mentee in the Available Mentees list will be added to the Selected Mentees list. Clicking the **Add All** button will add all the Available Mentees into the Selected Mentees list.
15. Click **Save** or **Cancel** in the Task Pane.



Service Date	8/22/2008
Event Location by School District*	SULTAN
CSAP Category	Education
Service Code*	STE06S Small Group Sessions (one time basis)
Count Method	Small group sessions are counted in the data set as recurring prevention services. Service Type Code=STE06.
Service Population*	SP26 Youth/Minors
Count*	2
Session Length* Hrs.	3
Parent/Guardian*	☑
Service Description*	Bowling Challenge
Benchmark*	Not State Benchmark
Selected Matches*	Maxwell Flint (Mentor) -- Tim Sharp (Mentee)

Remove All | Remove | Add | Add All

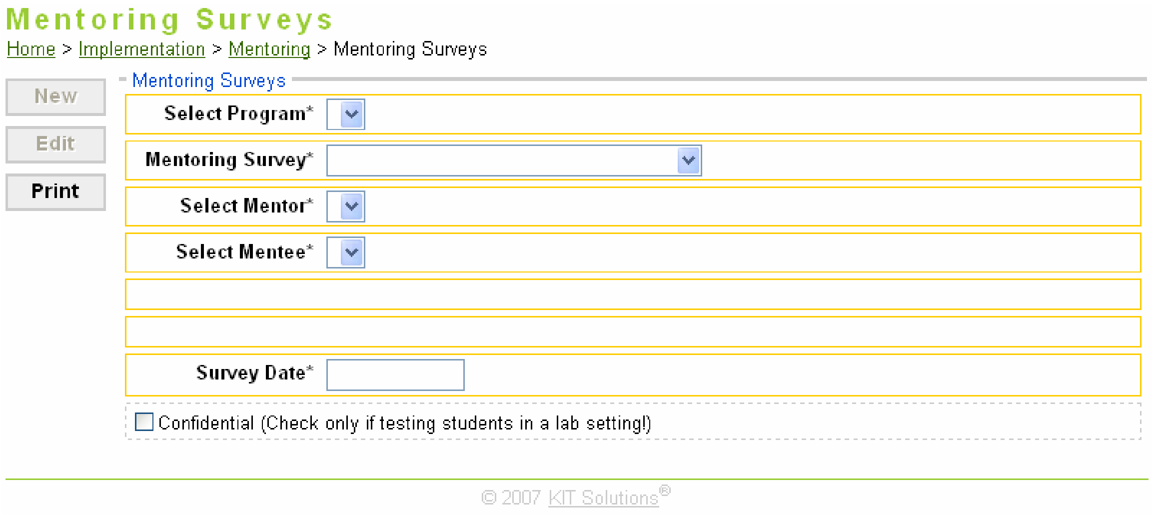
Filter By Group	
Available Matches	1Betty White (Mentor) -- 1Susan Hilbert (Mentee) 1Billy Jones (Mentor) -- 1Albert Jones (Mentee) annie smith (Mentor) -- bob jo (Mentee) Maxwell Flinter (Mentor) -- Tim Sharps (Mentee)

Mentoring Surveys

The Mentoring surveys available in the PBPS are designed to capture data related to quality mentoring programs as defined by the National Mentoring Center http://www.nwrel.org/mentoring/. Below is a sample of surveys not necessarily required by DASA, but refer to your contract to determine which surveys are required:

Type	Description
Mentee Risk Profile (NEW) Pre/Post	This is a pilot tool designed for CTI to be completed by program staff to determine if a mentee faces multiple risks.
Mentee Pre-test	To be completed by the Mentee prior to the delivery of services, along with the DASA required Pre-Test (PPG). This Pre-Test will be compared later to a Post-Test at the end of the match.
Mentor Support Tracking	To be completed by the Mentor midway in the match relationship, ideally 6 months after initial match. This tool is designed to check the quality of the match support from the mentors perspective and inform program staff accordingly.
Mentee Post-Test	To be completed by the mentee upon the closure of the match, or at 12 month intervals if the match continues long-term, along with the DASA required Post-Test (PPG). Responses are compared with the Mentee Pre-Test to assess changes.
School Success Report	To be completed along the same time points as the Mentee Pre- (baseline), Follow-up, Interim and Post-Test Surveys; the School Success Report is designed to capture changes in the Mentees school behavior during their involvement in the program.

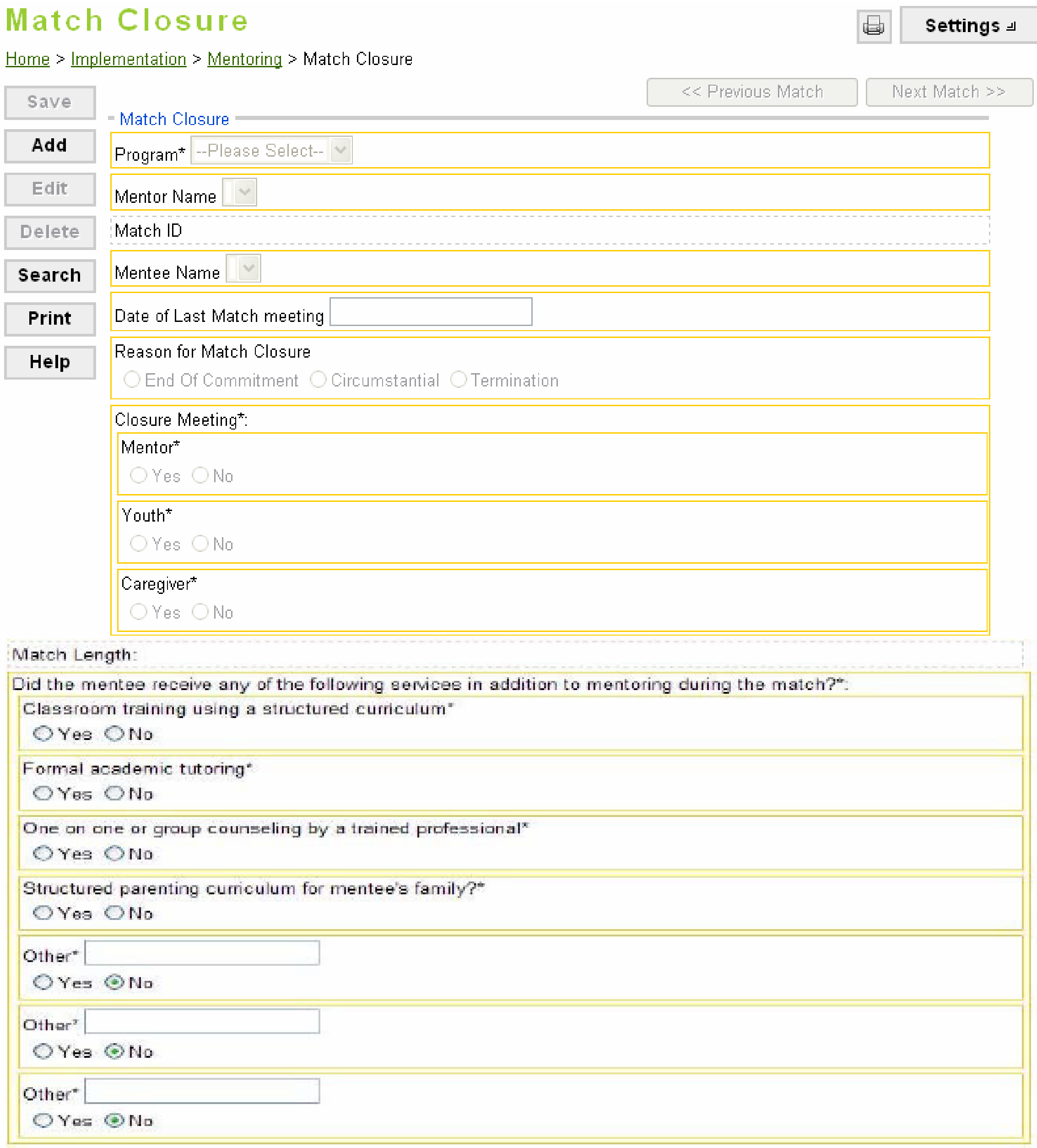
1. Click **Implementation** in the Menu.
2. Click **Mentoring Surveys** in the Sub-Menu.
3. Select the program from the **Select Program** drop down menu.
4. Select the desired survey from the **Mentoring Survey** drop down menu.
5. Select the mentor from the **Select Mentor** drop down menu.
6. Select the mentee from the **Select Mentee** drop down menu.
7. Type the date (mm/dd/yy) in the **Survey Date** text field.
8. Check the **Confidential** box if you want to administer the survey to a participant on the computer or lab setting.
   ***Note:** After you click new and once the survey has been completed by pressing done, the PBPS will automatically Log Out so that the participant cannot view any other parts of the PBPS.
9. Click **New** in the task pane.
   ***Note:** The PPG survey will be displayed.
10. Answer the questions with the participant's responses.
    ***Note:** Navigate through the survey using the buttons at the top and bottom of the form. If the navigation buttons are not active, then there is only one page of the form.
11. Press **Enter** or click **DONE** when complete.
12. Click **OK** when asked to save the survey if you would like to save the changes. Click **Cancel** when asked to save the survey if you would like to abort the changes.



Match Closure

Mentor/Mentee matches that come to an end should be documented in the PBPS. Since the PBPS will not allow one mentee to be matched to more than one mentor (simultaneously), you will have to enter the match closure in the PBPS before creating a new mentor/mentee match with that mentee. Once the match is closed, you will not be able to input any data for that match. You should enter all data into a match before closing it.

1. Click **Implementation** in the Menu.
2. Click **Match Closure** in the Sub-Menu.
3. Click **Add** in the Task Pane.
4. Select the program from the **Select Program*** drop down menu.
5. Select the mentor from the **Mentor Name*** drop down menu.
6. Select the mentee from the **Mentee Name*** drop down menu.
7. Type the last contact date between the mentor/mentee in the **Date of Last Match Meeting*** text field.
8. Click the radio button next to the reason to indicate the **Reason for Match Closure***.
9. Click the radio button next to the persons to indicate who attended the **Closure Meeting***.
10. Finish the remaining services categories by clicking the radio buttons to indicate other services the mentee received during the match, if any.
11. If there were other services provided to the mentee, type a description in the **Other*** text field and click the Yes radio button.
12. Click **Save** or **Cancel** in the Task Pane.



Match Closure

Home > Implementation > Mentoring > Match Closure

Settings

Save
Add
Edit
Delete
Search
Print
Help

<< Previous Match   Next Match >>

Match Closure

Program* --Please Select--

Mentor Name

Match ID

Mentee Name

Date of Last Match meeting

Reason for Match Closure
End Of Commitment Circumstantial Termination

Closure Meeting*:

Mentor*
Yes No

Youth*
Yes No

Caregiver*
Yes No

Match Length:

Did the mentee receive any of the following services in addition to mentoring during the match?*:

Classroom training using a structured curriculum*
Yes No

Formal academic tutoring*
Yes No

One on one or group counseling by a trained professional*
Yes No

Structured parenting curriculum for mentee's family?*
Yes No

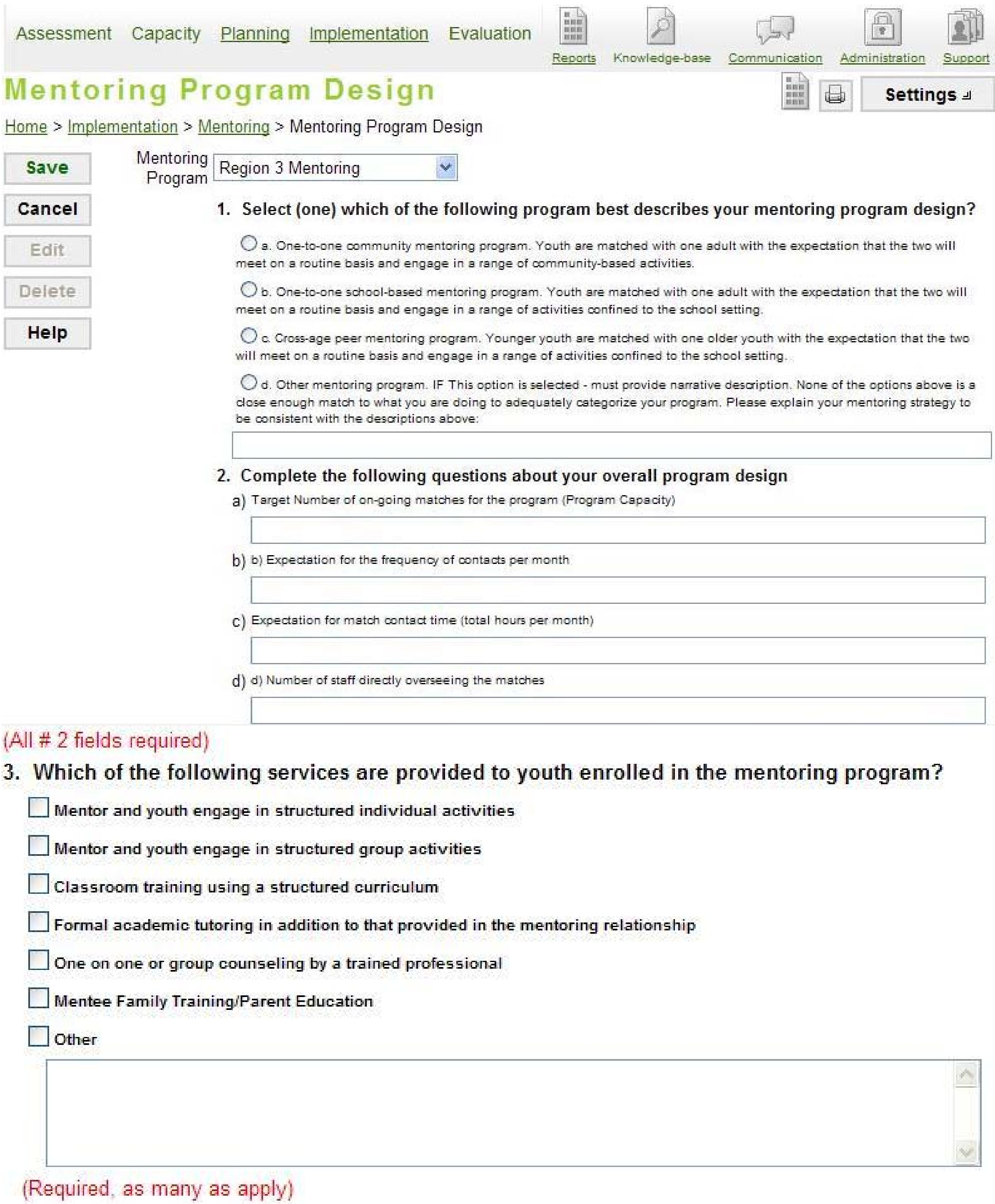
Other*
Yes No

Other*
Yes No

Other*
Yes No

Mentoring Program Design

1. The following survey is to be completed by the service provider before the mentoring sessions begin. This may be a requirement of your contract so refer to your contract for guidance.



Assessment Capacity Planning Implementation Evaluation

Reports Knowledge-base Communication Administration Support

Mentoring Program Design

Settings

Home > Implementation > Mentoring > Mentoring Program Design

Save
Cancel
Edit
Delete
Help

Mentoring Program: Region 3 Mentoring

1. Select (one) which of the following program best describes your mentoring program design?

a. One-to-one community mentoring program. Youth are matched with one adult with the expectation that the two will meet on a routine basis and engage in a range of community-based activities.

b. One-to-one school-based mentoring program. Youth are matched with one adult with the expectation that the two will meet on a routine basis and engage in a range of activities confined to the school setting.

c. Cross-age peer mentoring program. Younger youth are matched with one older youth with the expectation that the two will meet on a routine basis and engage in a range of activities confined to the school setting.

d. Other mentoring program. IF This option is selected - must provide narrative description. None of the options above is a close enough match to what you are doing to adequately categorize your program. Please explain your mentoring strategy to be consistent with the descriptions above:

2. Complete the following questions about your overall program design

a) Target Number of on-going matches for the program (Program Capacity)

b) b) Expectation for the frequency of contacts per month

c) Expectation for match contact time (total hours per month)

d) d) Number of staff directly overseeing the matches

(All # 2 fields required)

3. Which of the following services are provided to youth enrolled in the mentoring program?

- Mentor and youth engage in structured individual activities
- Mentor and youth engage in structured group activities
- Classroom training using a structured curriculum
- Formal academic tutoring in addition to that provided in the mentoring relationship
- One on one or group counseling by a trained professional
- Mentee Family Training/Parent Education
- Other

(Required, as many as apply)