CDL

Community Data Link

Version 4.5

User's Guide

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Table of Contents

Overview

Main Menu

Exhibit 1.0

The Community Data Link (CDL) Access database was designed as a client/ services information and tracking system that can report outcomes; in short, an accountability system. CDL allows Users to track and store records of clients served, services provided, referrals made, and then report summary demographic information as well as outcomes to funding sources or to state agencies. Reports may also be generated for program management. While CDL was designed for tracking clients and services and reporting outcomes, some unique features make it useful for Case Managers as well. The Main Menu (Exhibit 1.0) lists the Sections of the CDL. This instruction manual will walk the User through each section and explain how to use each feature.

Users will find CDL to be (1) User friendly. On-screen prompts guide the User how to edit or select from a data field. (2) Flexible. Pull-down menus are User defined. (3) A time saver when reports are due and through staff changes or instead of searching for information kept in paper files.

For efficiency and consistency, some table information has been pre-loaded. Examples of pre-loaded data are (1) state standard reporting requirements such as Race/Language and Ethnicity, (2) common terms agreed upon by the steering committee such as person status; and (3) standard assessment tools such as the Family Assessment Form used by Relief Nurseries.

From your main menu (Exhibit 1.0) clicking on Family Search takes you into the CDL database where your client (the people you serve) information is recorded and stored.

Design Note: The screens are layered like an onion and can be navigated by clicking on a button from the screen you are viewing that opens the next screen. This is referred to as a "pop-up" screen throughout the manual. Following the steps will lead the User to "peal" the CDL onion where one screen reveals another layer of detail about your client.

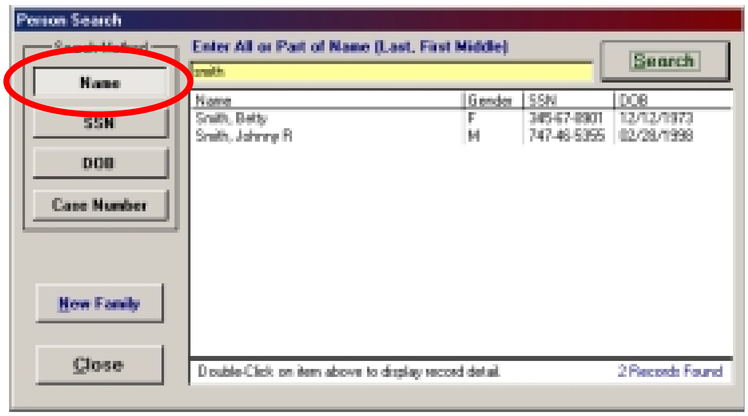
Screens within the Family Search Section include:

(1) **Person Search Screen (PSS**) (page 5) (a) PSS is where you first determine if someone is already in your database or (b) PSS is where you begin the process to add a person or family to your CDL database
(2) **Family Record Screen (FRS**) (page 6) (a) FRS permanently displays the family members at the top of each screen so you always have a visual of the family composition. (b) FRS is the access point for personal data in your database about each family member.
(3) **Find Person Screen (FPS)** (page 6) allows User to select a person within the family. FPS is where User edits information about a family member.
(4) **Person Information Screen (PIS**) (page 6) is where User adds a New Person to the family.

Person Search Screen (PSS)

Name Button
SSN Button
DOB Button
Case Number Button

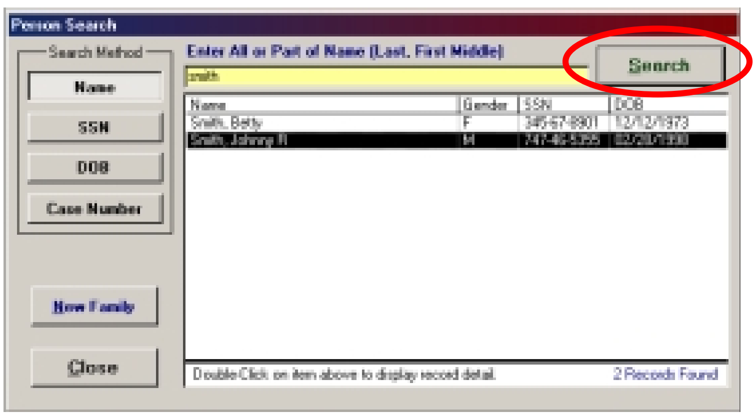
Exhibit 1.1



This section explains how to search for a person in your CDL database, how to change/edit information on a person in your database, how to add a new person (family member) to your CDL database and how to remove a family member from a family.

*Note: Terms **client, person** or **family member** may be used interchangeably throughout the User's Guide, depending on what term is most appropriate and helpful. Each term is referencing the same individual.* A single person is considered a family when there are no other family members.

Exhibit 1.2



To search for a person in your CDL database, click on Family Search on the Main Menu (Exhibit 1.0), from the Person Search Screen (PSS) (Exhibit 1.1) the most common way is to search for the person by name. However, you may also search for person by following the same process described below if you have a person's Social Security Number, Date of Birth or a Case Number.

1. Click on the Name button in the top Left corner of the screen.
2. The field labeled **Enter All or Part of Name (Last, First, Middle)** will turn yellow.
3. Put your cursor in the yellow field and key in an asterisk (*)
4. Click on the Search button OR hit Enter on your keyboard.

*Note: Key in an asterisk (*) and click on the Search Button. CDL will find and display for your selection ALL persons (Family Members) previously entered into your **Client** database.*

To narrow a search for a person,

1. From the yellow field, key in the last name, or first name or part of the name.
2. Click on the Search button OR hit Enter on your keyboard to initiate the CDL search within your database.
3. Example: Key in ***Marshall*** if you know that's the person's name. CDL will find all persons with that name (first or last). Or, key in ***Marsh*** if you are uncertain if their name is Marshall or Marshfield or Marshal. CDL will find all persons with ***Marsh*** anywhere in the person's name and display for your selection. (Exhibit 1.2)
4. Double click on the name of the person you wish to view or edit information.
5. The Family Record Screen (FRS) will pop up for you to view or enter any changes to that person's record.

Person Search Screen (PSS)

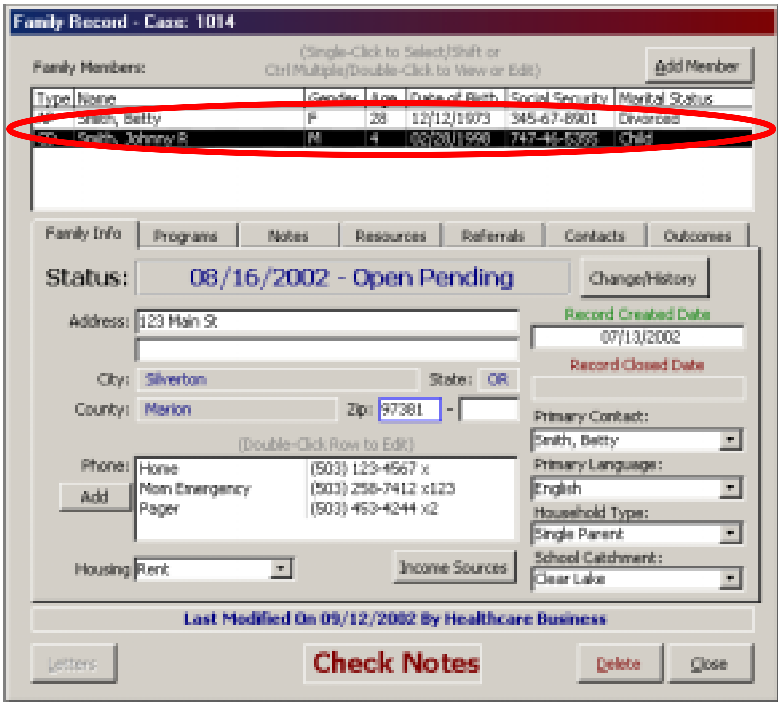
Family Record Screen

Person Information Screen

Race/Language Tab

Other Info Tab

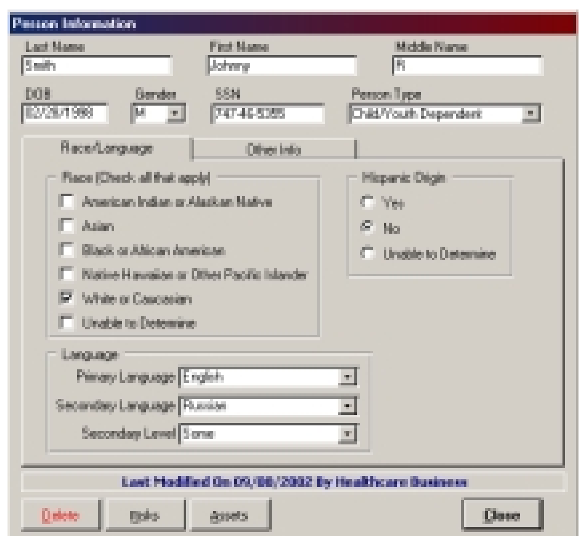
Exhibit 1.3



To change or edit information about a person in your database,

1. From the Person Search Screen, you must first search for the person in your database as described (Exhibit 1.2).
2. Then, from the Family Record Screen, double click on the person's name from the Family Members display screen (Exhibit 1.3). This will take you to the Person Information Screen (Exhibit 1.3a).

Exhibit 1.3a



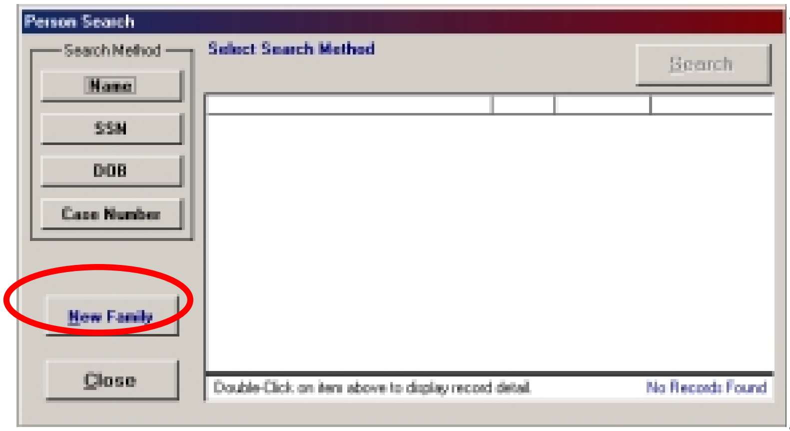
The Person Information Screen will pop up where the User can change demographic information (Exhibit 1.3a) on the Race/Language Tab and on the Other Info Tab. See page 7 for instruction on these tabs.

The Family Record Screen is also the access point to all individual information behind the Tabs (Exhibit 1.3). User may Select from one of the Tabs where the information to be changed is recorded. This instruction appears later in the Guide under the appropriate Tab.

Person Search Screen (PSS)

New Family Button
Family Record Screen
Add Member Button

Exhibit 1.4



To add a person to your CDL database,

1. Click on the **New Family** button on the Person Search Screen (Exhibit 1.4). CDL will take you to a blank Family Record Screen.
2. From the Family Record Screen, click on the **Add Member** button (Exhibit 1.5).
3. The Find Person Screen will pop up.
4. From this screen, you may either select a person already in the database to add to this family by searching and double clicking on the desired name from the displayed list, or click on the **New Person** button (Exhibit 1.6) to add the name and demographic information into your CDL database.
5. To add information in any field, place your cursor in the field and begin keying in appropriate data. Tab through fields to navigate through this screen.

Note: All persons added to a family are required to have a person type. Your Administrator may require other fields. See the Administration Section for instruction on how to set CDL to require specific data.

Note: Any data entered into a screen by the User may dynamically appear in other areas of CDL. Changing information in entry screens will also make these changes in all appropriate areas throughout CDL. User only needs to enter changes once in order to update information throughout CDL.

Exhibit 1.5

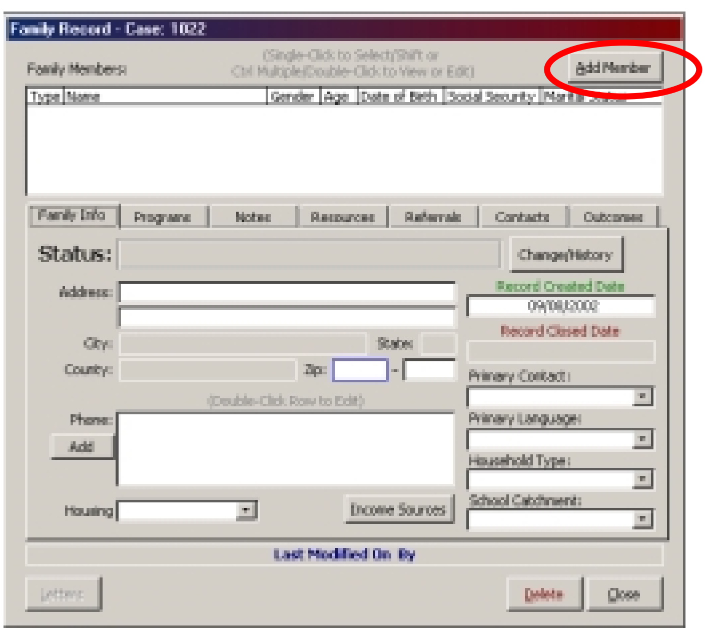
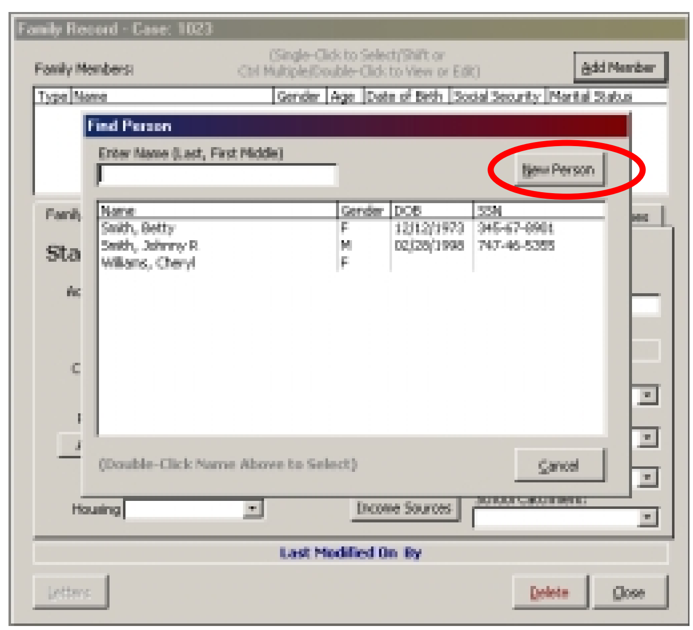


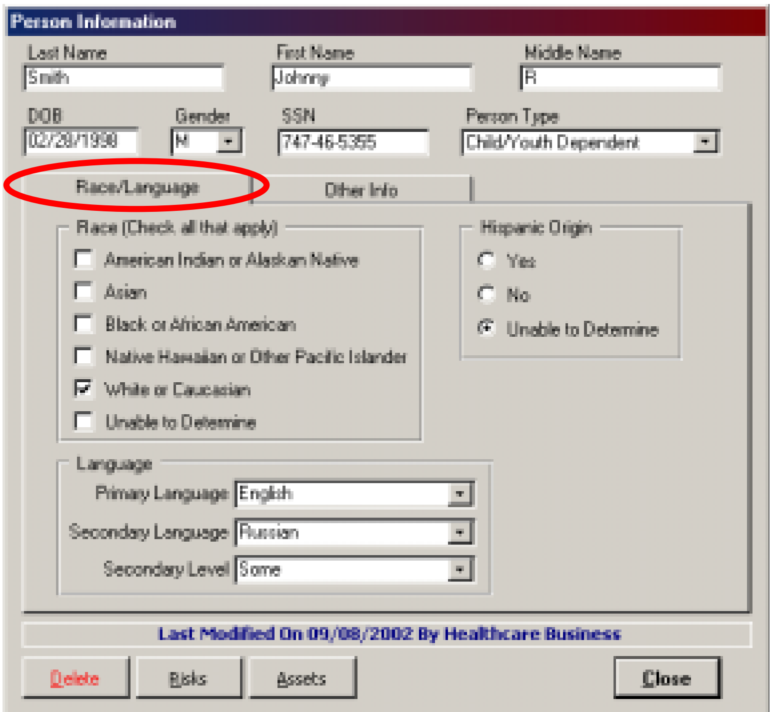
Exhibit 1.6



Person Search Screen (PSS)

Person Information Screen

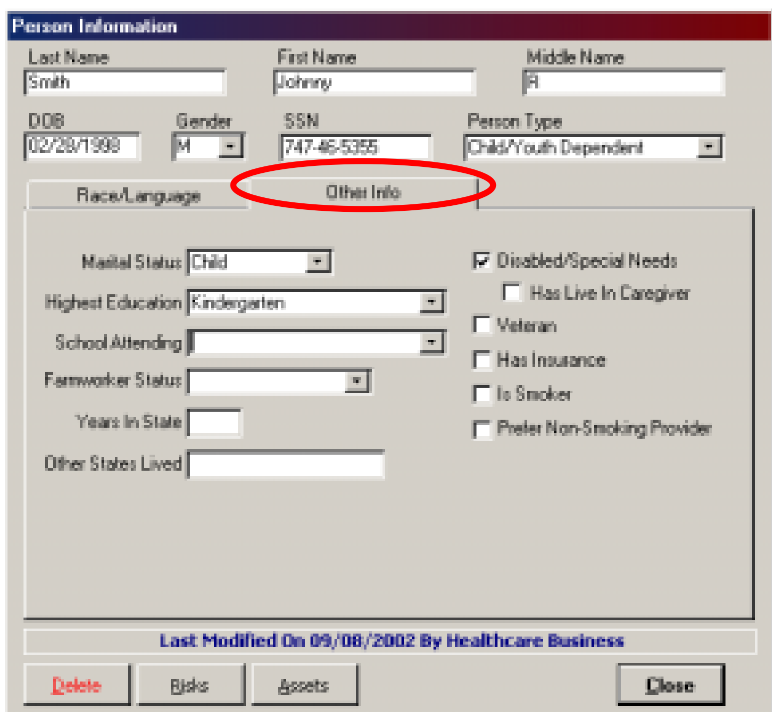
Exhibit 1.7



Note: To add information in any field, place your cursor in the field and begin keying in appropriate data. Tab through fields to navigate through this screen.

6. Race/Language Tab (Exhibit 1.7) automatically opens for efficient entry to this category of information. User may click on appropriate box(es) under the Race label. If more than one Race/Ethnicity is checked, reports will automatically record the person as Multi-Racial as required by state and federal data collection.
7. Click on the Other Info Tab (Exhibit 1.8) to add person-specific data about Marital status, education, farm-worker status, disabled/special needs or other detailed information that may be useful to record. These are optional fields that may be useful for case management.
8. Click on Close button on the bottom right side of your screen. CDL will take you back to the Family Record Screen.

Exhibit 1.8



To remove (delete) a person from a family record,

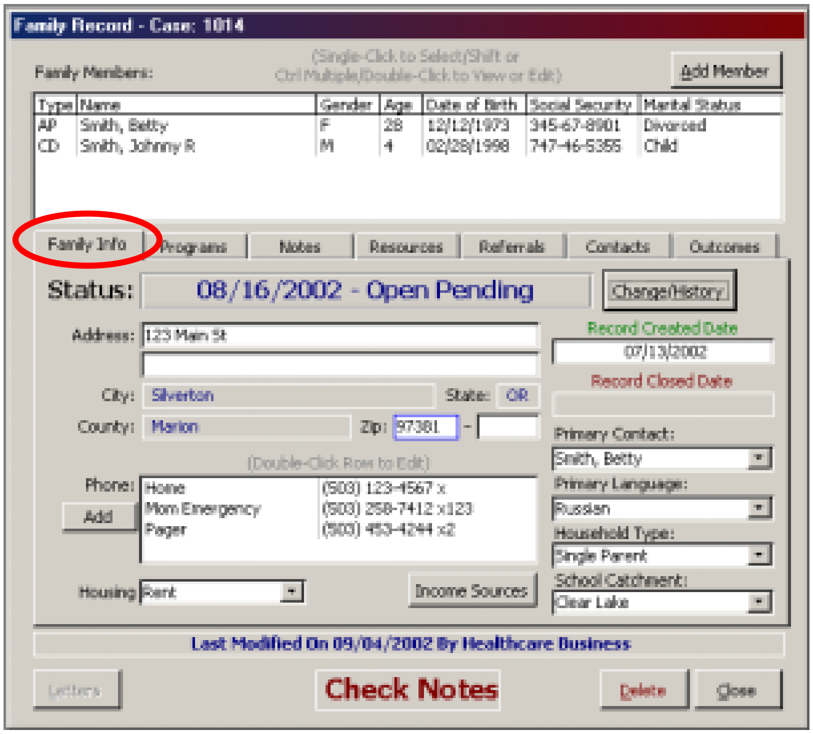
1. From the Family Record Screen,
2. Double click on the person you wish to remove from the family. The Person Information Screen (Exhibit 1.3) will pop up.
3. From the Person Information Screen (Exhibit 1.8), click on the **Delete** button in the lower left corner of your screen.
4. A dialog box will appear labeled **Destructive Action Requested**. Put your cursor in the field with the blinking cursor and key in the word ***Delete***. This is a conscious action on the User's part to prevent accidental deletion of data.
5. Click on the OK button. CDL automatically removes the person from the family.

Family Record

Screen (FRS)

Family Info Tab

Exhibit 1.9



1. Clicking the **Change/ History** button takes you to a screen where User can determine or change the status on the family and date the change.

Example: Smith family receives services for a period of time, moves away for several weeks, and returns for additional services.

2. Click in the **Address** field to enter address of family.

3. Enter the Zip Code first. The Zip Code field automatically feeds the City, State and County.

4. Click the **Add** button to the left of the screen to enter phone number(s) for family.

5. Click on the pull-down menu under Primary Contact to determine the person who is the primary contact for the family.

Note: CDL requires a primary contact for the family. If only one person in the family, they should be identified as the primary contact.

6. Click on the **Income Sources** Button to record the family income sources and amounts.

*Note: Family member information remains visible to User even when clicking through Tabs (Family Info, Programs, Notes, Resources, Referrals, Contacts, Outcomes). Double clicking (highlighting) on a Family Member from those names displayed activates **<u>that</u>** person's specific information.*

From the Family Record screen (Exhibit 1.9) User may access both the family information and individual person information. *<u>The Family Info Tab is family specific. All other tabs (Programs, Notes, Resources, Referrals, Contacts, Outcomes)</u> are person <u>specific</u>.* When double clicking on any person listed in the Family Members field, a pop-up screen with person-specific information will appear (Exhibit 1.7, 1.8).

Family Record Screen (FRS)
Person Information Screen (PIS)

Risks Button

Risks for Name of your Client Screen

Assets Button

Assets for Name of your Client Screen

Note: Before utilizing the Risks and Assets feature of CDL, be sure to pre-load a Risk or Asset Assessment tool in the Look-up Tables under Administration (from the Main Menu), or use one of the standard Risk or Asset Assessment Tool already loaded into CDL.

Exhibit 2.1

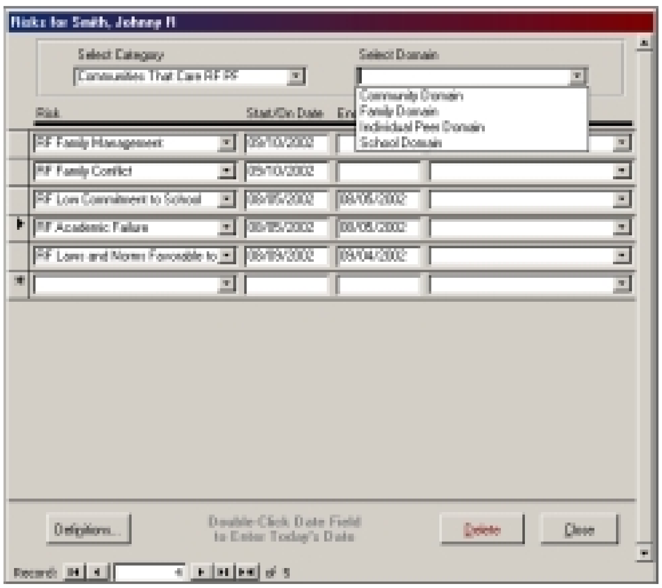
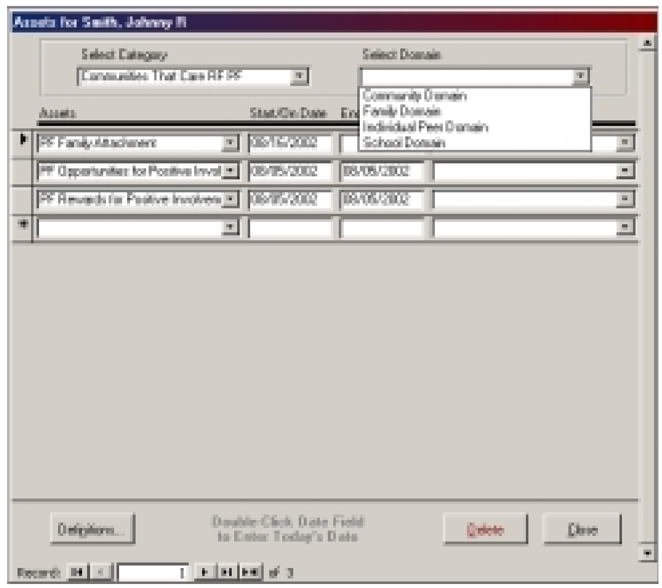


Exhibit 2.2



From the Family Record Screen (Exhibit 1.7), double click on a family member's name and the Person Information Screen (Exhibit 1.8) will pop up.

In addition to the demographic information, a person may have other factors or conditional indicators that play a role in the person's success or failure to thrive in our society.   These indicators are called Risks and Assets. Conditions can be "pro" or "con," "positive" or "negative."

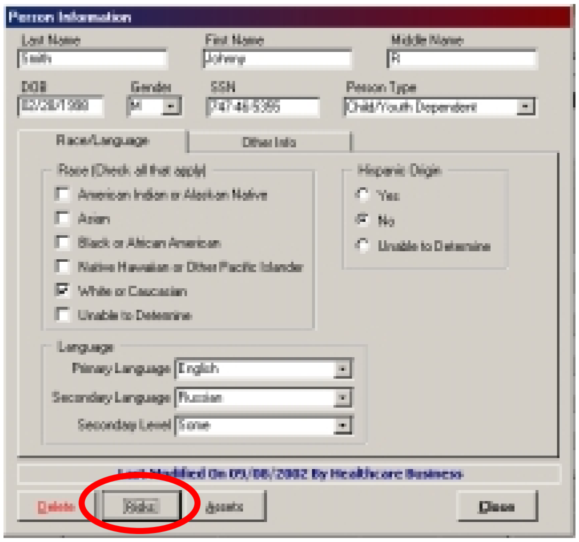
At the point of intake or at any time, the User may assess risks or assets that need to be tracked. Risks or assets may be added, changed or invalidated in CDL as the person's condition or status changes by utilizing the start on date and end date that corresponds to each risk or asset.

Note: The Definitions Button (Exhibit 2.1) in the lower left corner lets you view the definition(s) of all the risk and asset categories.

Person Information Screen (PIS)

Risks Button

Exhibit 2.3



1. Clicking on the **Risk** button in the lower left corner of the Person Information Screen (Exhibit 2.3) will reveal a pop-up screen labeled Risks for xxx (Exhibit 2.1), the name of the person.

Note: This simple screen must be preloaded with a Risk Assessment Tool that meets the needs of your program.

2. Click on the arrow to the right of the Select Category field (Exhibit 2.1), select the appropriate Risk Category from the pull-down menu and highlight the selection by left clicking with your mouse.

Note: If there is also a Domain associated with the Risk Category, then from the pull-down menu in the Domain field, select a Domain by left clicking mouse (highlighting) on the appropriate Domain.

3. From the pull-down menu under the Risk heading (Exhibit 2.1), select the risk that applies.

Note: You must assign a start date to each risk. This is typically the date the User or the person who made the assessment first learned about the risk.

4. When the risk is no longer valid or resolved, User must assign an end date to that risk. To enter today's date, simply double click in the date field.

Note: This date can be changed to reflect the date you determined the risk.

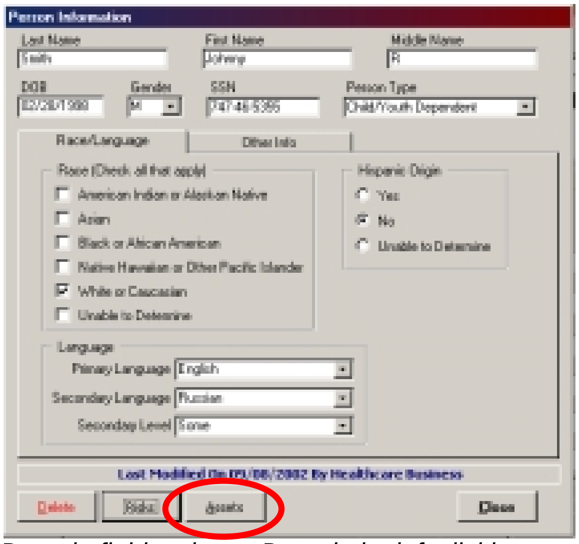
5. This date assignment is an important piece of information that can be key information for the Outcomes measurement.

Note: Repeat the process through all the risk categories.

Person Information Screen (PIS)

Assets Button

Exhibit 2.4



1. Clicking on the **Assets** button in the lower left corner of the Person Information Screen (Exhibit 2.4) will reveal a pop-up screen labeled Assets for xxxx (Exhibit 2.1), the name of the person.

Note: This simple screen must be preloaded with an Asset Assessment Tool that meets the needs of your program.

2. Click on the arrow to the right of the Select Category field (Exhibit 2.1), select the appropriate Asset Category from the pull-down menu and highlight the selection by left clicking with your mouse.

Note: If there is also a Domain associated with the Asset Category, then from the pull-down menu in the Domain field, select a Domain by left clicking mouse (highlighting) on the appropriate Domain.

3. From the pull-down menu under the Asset heading (Exhibit 2.1), select the asset that applies.

Note: You must assign a start date to each asset. This is typically the date the User or person who made the assessment first learned about the asset.

4. When the asset is no longer valid, User must assign an end date to that asset. To enter today's date, simply double click in the date field.

Note: This date can be changed to reflect the date you determined the asset.

5. This date assignment is an important piece of information that can be key information for the Outcomes measurement.

Note: Repeat the process through all the asset categories.

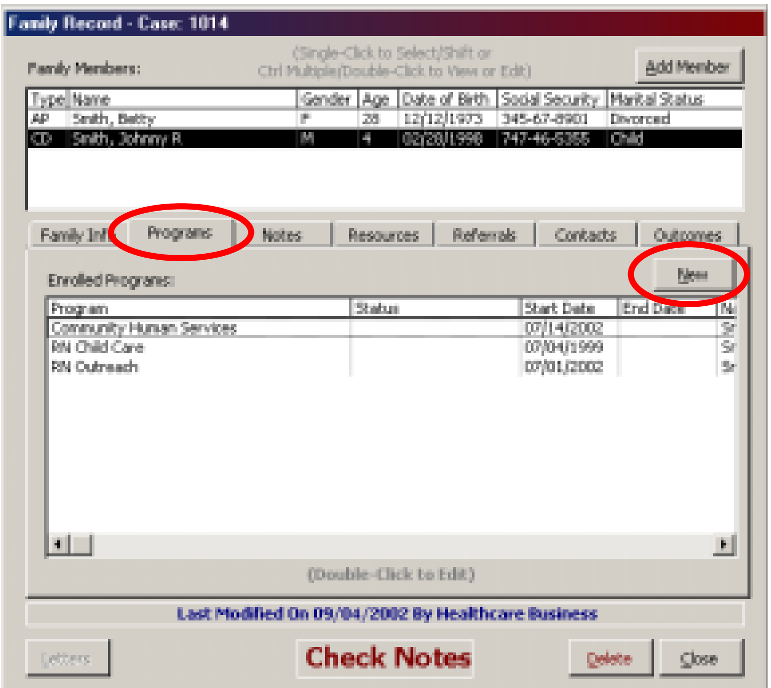
Family Record Screen (FRS)

Program Tab

New Button

Note: This screen identifies which program or services a person has been assigned to. For purposes of tracking services within Community Data Link, the User makes a program assignment when the point of contact can meet the person's need within their organization.

Exhibit 2.5



Note: This feature allows a User to track the person you are serving through the one or many programs and services you provide.

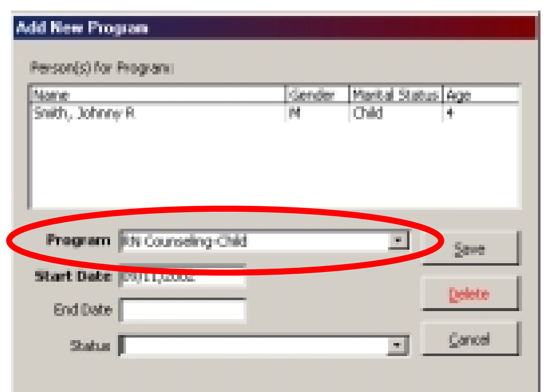
Note: In order to gather complete information so you can measure outcomes, you must first decide what services you will need to track.

Note: Before using this feature, you must first add all the services and programs you want to track to the Look-up Tables in the Administration Section.

1. From the Family Record Screen (Case xxxx) (Exhibit 2.5), click (highlight) on the name of the person you are enrolling or assigning to the program.

Note: You may click on more than one family member if you wish to enroll them in the same program at the same time by holding down the Ctrl key on your keyboard.

Exhibit 2.6



2. Click on the **Program** Tab (Exhibit 2.5).

3. Click on **New** button (Exhibit 2.5).

4. A dialog box labeled Add New Program will pop up (Exhibit 2.6). From the Program field (Exhibit 2.6), choose which service or program you want to assign to this person.

*NOTE: BE SURE TO ASSIGN THE CLIENT YOU ARE ENROLLINNG IN YOUR PROGRAM TO AT LEAST **ONE** UNIQUE PROGRAM SO YOU WILL BE ABLE TO REPORT A CLEAN HEAD COUNT. This program assignment will be an unduplicated count of people you serve.*

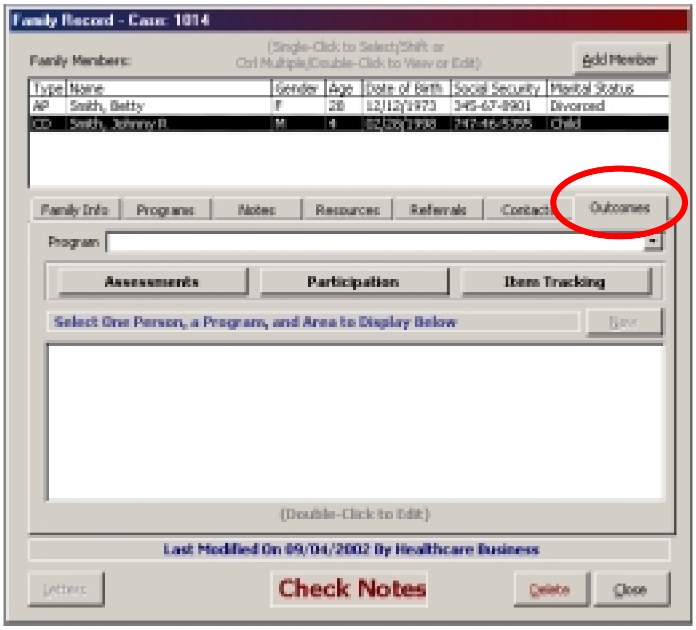
5. Click on SAVE button.

Family Record Screen (FRS)

Outcomes Tab

This feature identifies what is being measured in each Program. Reports from data entered into the Outcomes Section calculate changes in raw data or percentages. Examples of measurements include assessments or surveys conducted before and after a client is enrolled in an organization's program. A more specific example is improved grades after a student has participated in an after-school homework program.

Exhibit 2.7



Note: The outcomes module allows s to MEASURE and REPORT a change.

Note: Before using this feature, s must make decisions and load or select from the pre-loaded standard tools in the Look Up Tables under Administration. The Administration Section is accessed from the main menu of CDL.

1. Select the most appropriate measurement tools. Each Program from the pull-down menu will have assessment tools pre-loaded.

Note: This Tool may be a standard assessment or a customer satisfaction survey or a family assessment form etc.

2. Post the results of these measurements to the outcomes module either by entering a total score, a section score or a score for each item on the assessment form.

3. From the Family Record Screen, click on the **Outcomes** Tab (Exhibit 2.7).

   a. Click (highlight) the person in the family you want to record the measurement for.
   b. From the drop-down menu in the Program field, select one program from the list by clicking (highlighting) it.
   c. Click on the button that identifies the type of measurement you are using in this Program.
      Note: The buttons are located in the middle of the Family Record Screen under the Outcomes Tab. These buttons are labeled Assessments, Participation and Item Tracking. Each program has preloaded measurement tools that will show up when you click on the measurement button.
   d. Clicking on the New button will bring up another screen for entering information from your measurement tool.

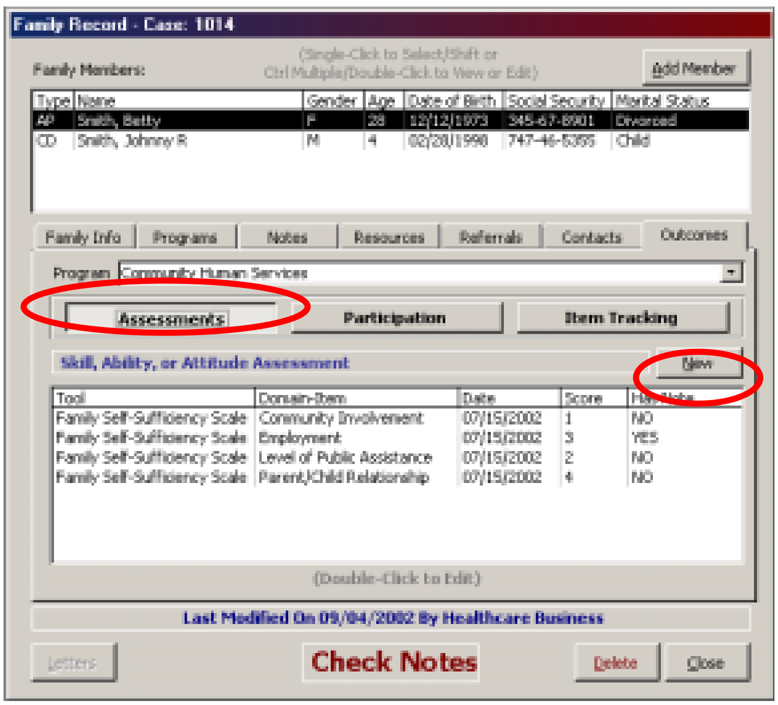
Outcomes Option One:

Outcomes Tab

Assessments Button
New Button

Assessments are made to measure a person's skills, ability or attitude at a point in time. There is a direct relationship between the program assignment under the Program Tab and the Outcome. User must first determine which measurement tools will be used for those programs they wish to measure results and to report outcomes. Be sure to Preload Assessment Tools in the Look-Up Table under the Administration Section. This instruction Option is to be used when the Program Manager has determined that Assessments (i.e. surveys, standardized assessment forms, custom intake assessments or screening tools etc.) are to be used in measuring progress, improvement or lack of progress or improvement. Periodic reassessment measurements can then be recorded so CDL can create a report that compares assessments over time. This will produce an Outcome Report.

Exhibit 2.8



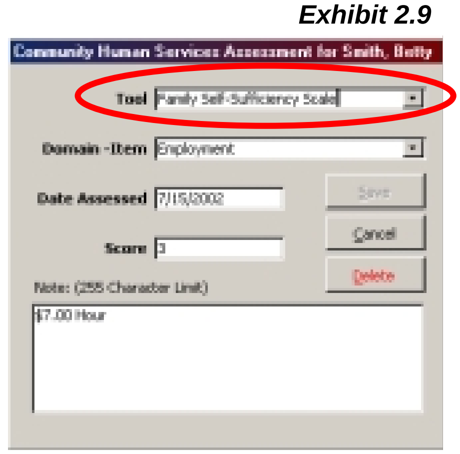
To record Assessments,

1. Click on **Assessments** Button (Exhibit 2.8).

2. Click on **New** Button (Exhibit 2.8) to record results of an assessment that measures a person's skills, ability or attitude.

Note: This pop-up screen will be labeled the same as your program assignment and includes the name of the person you are assessing.

Exhibit 2.9



3. Select a **Tool** (Exhibit 2.9) from the drop-down menu in the Tool field by clicking on it.

4. If there is also a Domain – Item name associated with this Tool, it will be an option in the drop-down menu in the Domain – Item field. Select one by clicking on your choice.

5. Enter the date of the assessment.

6. Enter the score on the assessment.

Note: You may use the Note section (255 characters) to explain a score or deviation.

Outcomes Option Two:

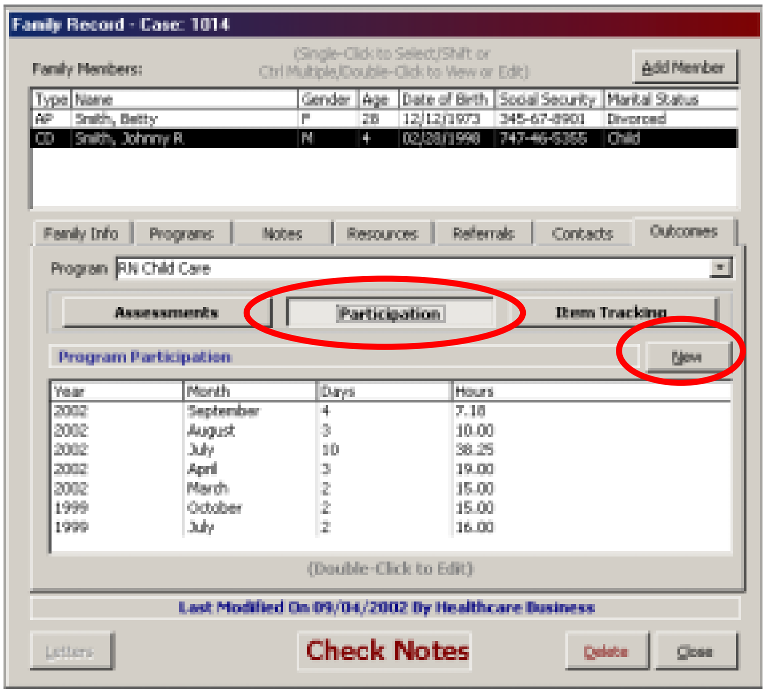
Outcomes Tab

Participation Button
New Button

Recording a person's Participation in a Program can be used to show the person's commitment to learning, commitment to changing or commitment to improving a skill or ability or simply a commitment to be involved in an activity. There is a direct relationship between the program assignment under the Program Tab and the Outcome. Before entering the Program participation information, be sure to set up whether you want to measure days or hours. Set up your choice for hours or days in the Look-Up Tables under Programs.

The Participation feature is used to measure a person's actual participation in a Program.

Exhibit 3.1



To record participation in a program,

1. Click on the **Participation** Button (Exhibit 3.1) to measure a person's actual participation in a Program.

2. Then, click on **New** Button (Exhibit 3.1) to enter a person's Program participation on the pop-up calendar (Exhibit 3.1a, 3.1b).

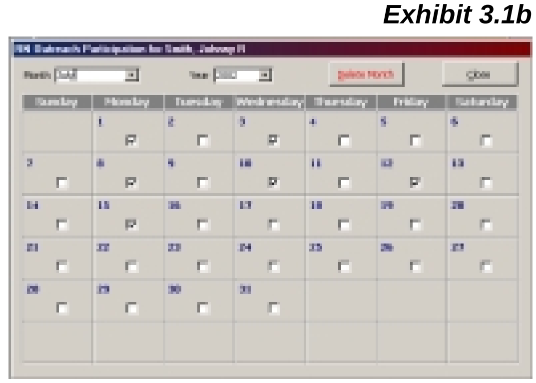
NOTE: THERE IS A DIRECT RELATIONSHIP BETWEEN THE CALENDAR AND THE DATES A PERSON WAS ENROLLED IN THE PROGRAM. If you enrolled someone for a period of one day or one week, then the calendar will allow you to enter information only for the time period between the enrollment start and end date.

3. To enter Participation Days (Exhibit 3.1b), simply click in the box on the date(s) of participation on the calendar. The total days of participation entered will appear on the Family Record Screen.

4. To enter Participation Hours (Exhibit 3.1a), insert the hours in the calendar day. Hours may be entered in whole number or in hours and minutes. Users may report minutes by entering the number of minutes after the decimal. I.e. .15 is fifteen minutes.

Exhibit 3.1a

Exhibit 3.1b



Outcomes Option Three:

Outcomes Tab

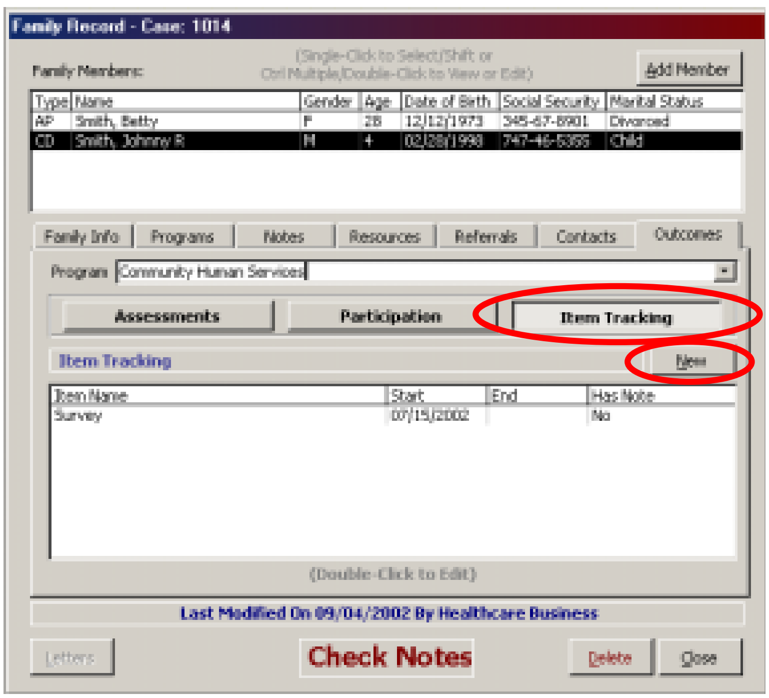
Item Tracking Button

New Button

Item Tracking is a highly flexible tracking tool. Item Tracking can be used to track those required and necessary steps, milestones, "items" that specifically tell the program manager that a person has met certain criteria or has a credential or health condition etc.

Some examples: You want to track people who have been immunized, the immunization record can go in item tracking—it does not have a "score" or it would be in the assessment section. It does have a date attached to the "item." Perhaps you want to track Progress when someone was referred to a counselor. You may label the item "Progress Report" and attach the date and make notes as to what the Progress Report included. You may track "Release of Information" and include the pertinent information about to whom information can be released.

Exhibit 3.2



1. Click on **Item Tracking** Button (Exhibit 3.2) to choose.

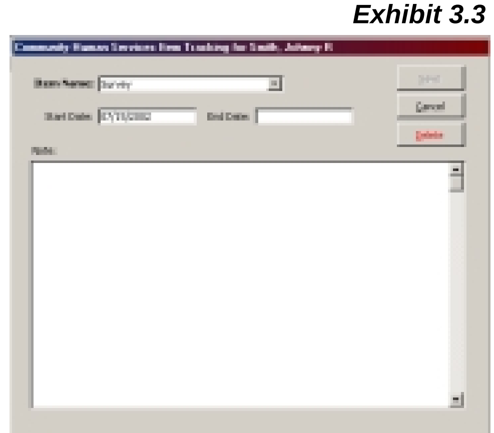
2. Click on **New** Button (Exhibit 3.2) to add an Item you want to track.

Note: The pop-up screen will be labeled the same name as the Program and will also include the name of the person.

3. From the drop-down menu in the Item name field (Exhibit 3.3), select the item you wish to track.

4. Enter the start date for the date this item became effective for purposes of your need to know.

Exhibit 3.3



Note: i.e. Application date. If you are tracking how many people applied for a program but didn't complete the application process, then enter the date they applied. When they complete the application process, enter that date in the end date field. You could then generate a report indicating how many people applied but did not complete the application process.

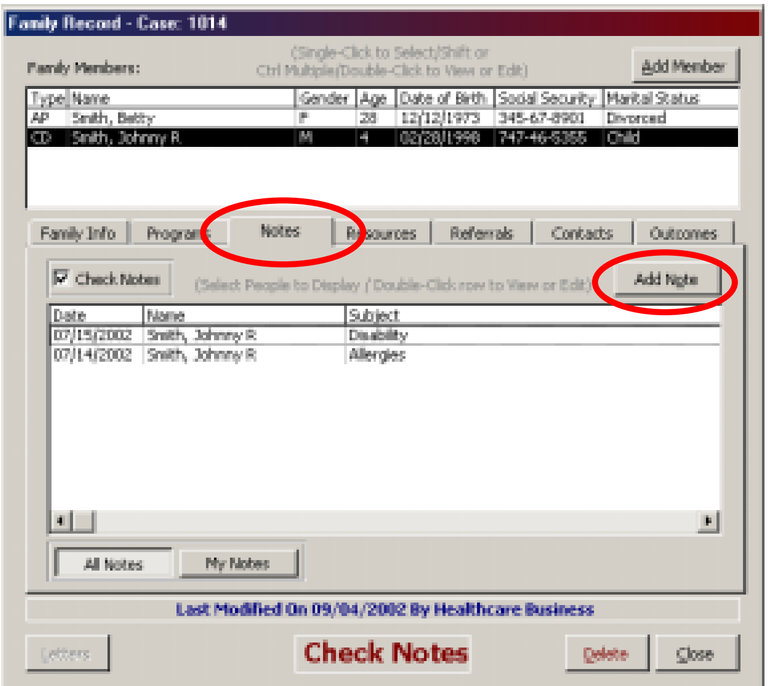
Note: You may use the Note section, for example, to explain why the person didn't complete the application process.

Family Record Screen

Notes Tab

Add Note Button
Print Notes Button

Exhibit 3.4



Note: Checking the field Check Notes turns on the flag to alert the User to check the note section because there is something about the family they need to know. Checking it again turns it off. This is an on/off toggle. A large "Check Notes" message will appear on the first family screen when the Note flag (Check Notes Box) is on (Exhibit 3.4).

1. Click on the **Add Note** button (Exhibit 3.4).

Note: The Subject field allows you to enter 50 characters. The first 47 characters are displayed in the Subject line of the Notes Tab Screen. If your note contains critical information, you may want to start the note with "Important" or some other significant word. You may enter any information you wish. If you continue to type beyond the 50 characters, you will automatically continue to the detail section of the screen. You can also use the tab key to begin entering on the detail section.

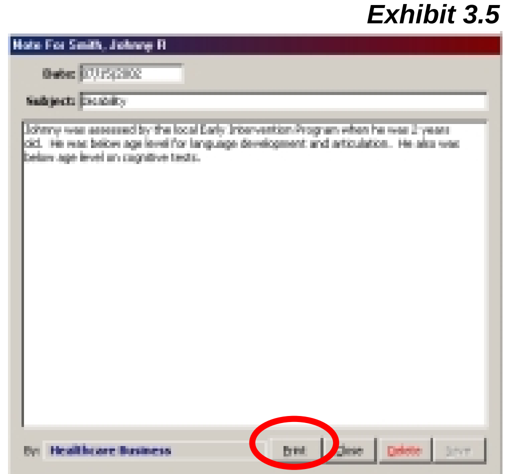
2. Click in the box below the "Subject" line (Exhibit 3.5) to place Notes text (max. 25,000 characters) for the person named in the top bar or activities related to them.

Note: This feature can be used in a variety of ways i.e., to record conversations the case manager has had with or on behalf of the person served, so that contact history can be referenced. This is called a Narrative. The Notes screen is intended for case management and daily operations in working with family members. It is not intended for general reporting purposes.

Exhibit 3.5

3. Click on the **Print** Button (Exhibit 3.5) to print the note in the window

4. Click on the close button.



Family Record Screen

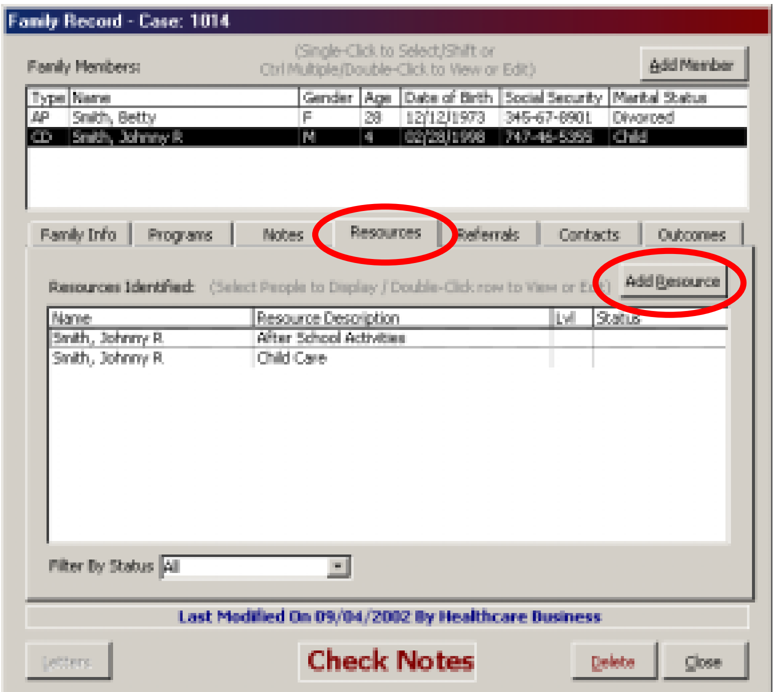
Assigning Resources

Resources Tab

Add Resource Button

A resource is something or someone to which one turns for assistance in difficult times of need in the absence of a usual means or source of supply. A resource might be a counselor, a food bank, a mission, a domestic violence shelter etc. This section includes instruction on how to assign a resource to a person in order to address a need.

Exhibit 3.6



To assign a resource,

1. First single click on a person from the Family Members list.

Note: You may click on more than one family member if you wish to assign them in the same resource at the same time by holding down the Ctrl key on your keyboard.

Note: The area in the center displays a list of resources that have been previously assigned.

2. Click on the **Resources** Tab.

3. Click on the **Add Resource** button (Exhibit 3.6) to add a resource to a person.

4. Select a resource from the predetermined list from the **Resource** pull down menu (Exhibit 3.7).

Note: Selecting from the list will tie the resource with the provider that administers that service. If providers have not been preloaded into the CDL system, you must do so in order to make a Referral.

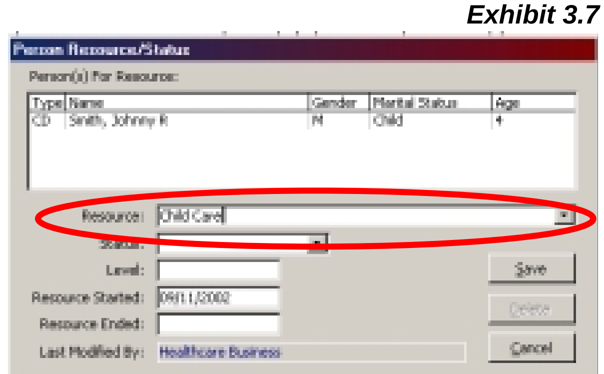
5. Selecting the **Status** from the pull down menu determines the status of the resource that has been applied (i.e. Active, Inactive, Resolved).

Note: Selecting Active will leave the resource open until you determine the "need" has been met.

6. The **Level** field is only used for Resources that regulate the Resource Type. This is an optional field. This field only allows numbers.

7. Click the Save button.

Exhibit 3.7



Family Record Screen

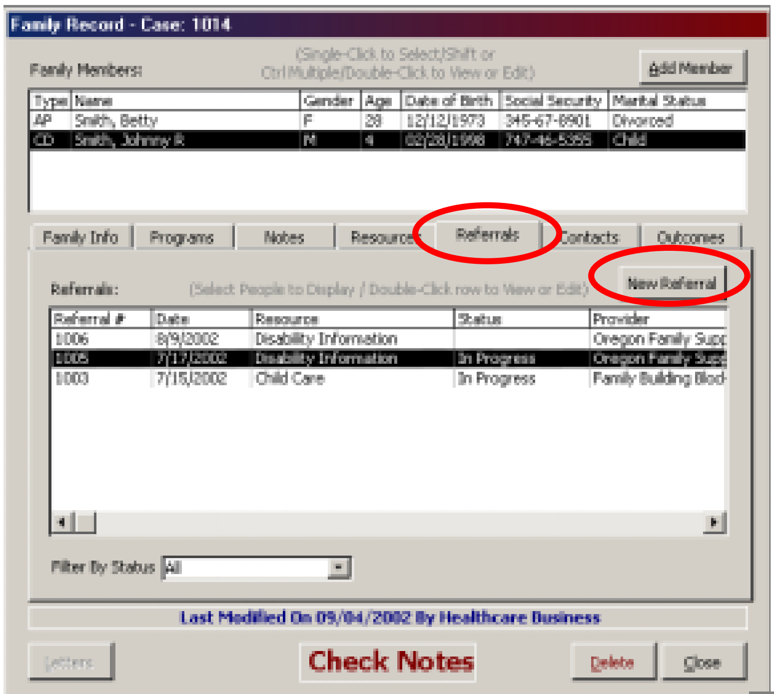
Making Referrals

Referrals Tab

New Referral Button

A referral is to direct someone to an outside source in order to get the help they need. A referral is by some one or by an organization contacted by phone or in person, with a person who has an identified need that cannot be met by the person contacted. This is considered a Point of Contact. That helping point of contact refers the person in need to a resource provider that can help them.

Exhibit 3.8



To make a referral,

1. First click on a person from Family Members list.

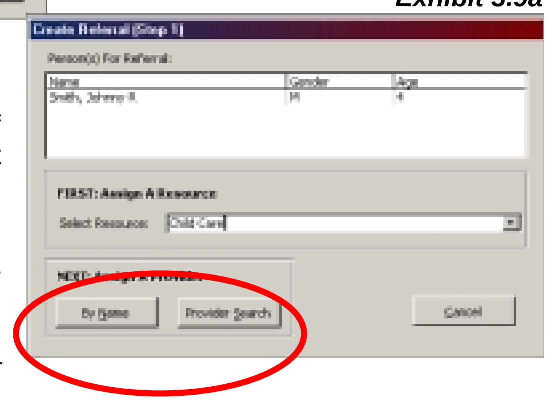
2. Click on the **New Referral** button to add a referral to a person (Exhibit 3.8).

Note: You may click on more than one family member if you wish to enroll them in the same program at the same time by holding down the Ctrl key on your keyboard.

Note: The area in the center displays a list of resources that have been previously assigned.

Note: This will take you to an area that starts with Step (1) of (3) (Exhibit 3.9a).

Exhibit 3.9a



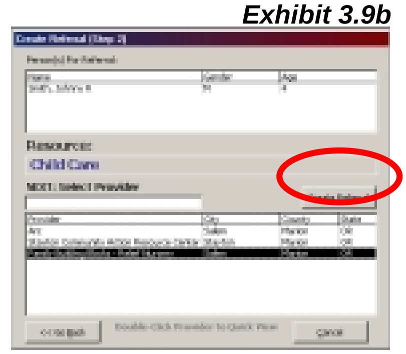
3. Step 1: Determine which resource type will meet the person's need from the pull-down menu in the middle of your screen under First: Assign a Resource. (Exhibit 3.9a).

4. Step 2: Select and Refer to a resource provider within that resource type by searching (by Name) or (Provider Search) under Next: Assign A Provider (Exhibit 3.9a).

Note: The (By Name) button displays a list of providers that you have predetermined in the provider section.

Note: The (Provider Search) button allows you to do a detailed search for a unique provider.

Exhibit 3.9b



5. When selecting the button (by Name), this will take you to a screen (Exhibit 3.9b) that displays all the providers that are in the system who can perform that particular service.

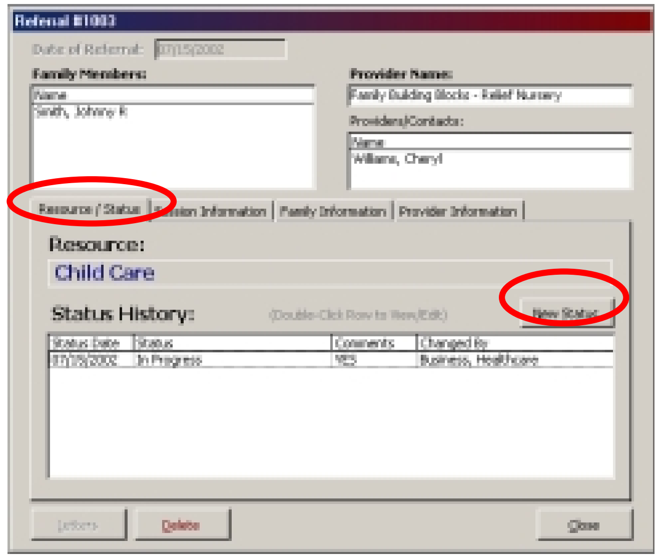
6. Single click on a provider from the list that you wish to refer your client.

Continued on next page…

7. Click on the button **Create Referral** (Exhibit 3.9a).

8. Clicking on **Create Referral** Button (Exhibit 3.9b), takes you to a screen that allows you to determine the status on the service that has been given.

Exhibit 4.1



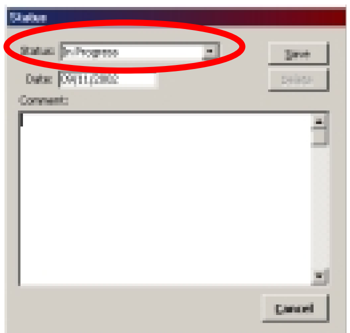
Note: The Resource/Status area will display a running list of every time a status has been a assigned to that particular person.

9. Click on the **New Status** button (Exhibit 4.1).

10. Pull down the menu in the status field (Exhibit 4.2) to determine what the status of the resource is (example: Initial Contact, Referred, Completed).

Note: In the Comments field, you can input narrative about the response to services or a progress report from the referred to provider. This area will allow you to put in 12,000 characters.

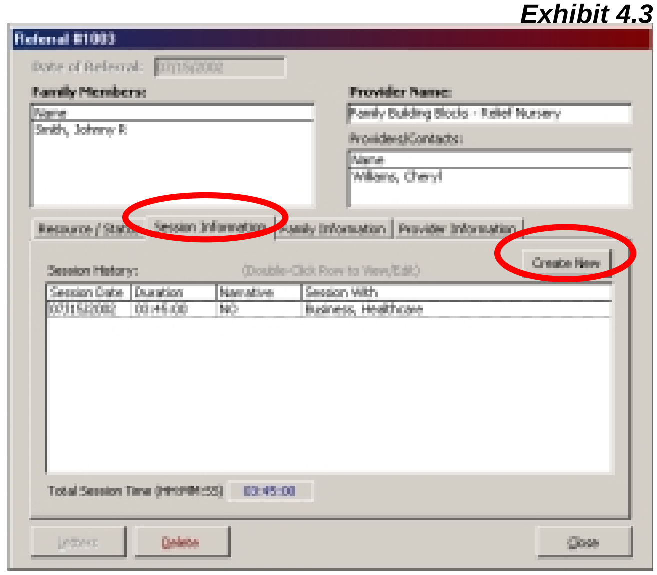
Exhibit 4.2



*Note: The **Session Information** tab will display a list of every session on that particular person.*

11. Click on the **Create New** button (Exhibit 4.3).

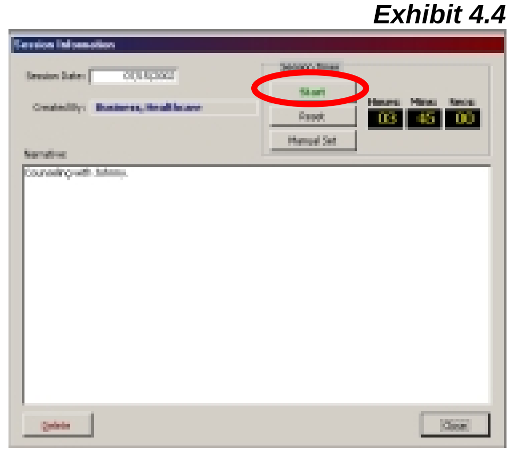
Exhibit 4.3



Note: When clicking on the Create New button, it will take you to an area that you can set a timer for the session which you will be performing.

12. Click on the **Start** button under the session timer to start (Exhibit 4.4). The timer to the right will start.

Exhibit 4.4



*Note: If you want to manually set the timer, click on the stop button and click on the **Manual Set** button, a dialog box will come up with a format how to enter the numbers in the system.*

13. Click the **Reset** button to clear all time on the clock.

14. Click on close to return to the referral.

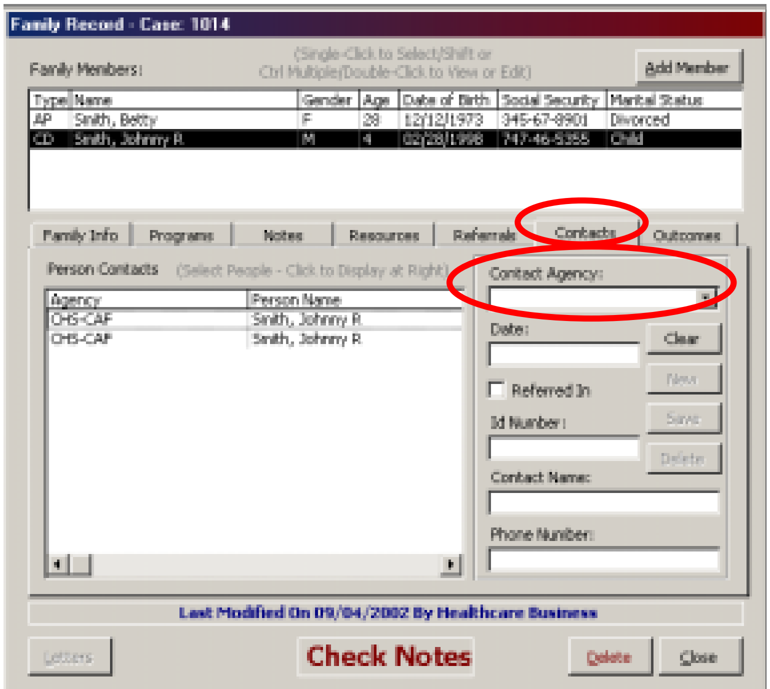
Note: you will have a list of every time you have created a session on a person.

Family Record Screen

Contact Tab

Contact is the point at which someone in need connects with a helping person or organization in the community who can either meet the need or refer the person in need to someone who can. In CDL, one primary use of the Contact is to identify which agency or contact point referred the person in need to Users agency. A second use of the Contacts is to identify all human service agencies the client is connected with

Exhibit 4.5



To identify,

1. Select the Agency Name you wish to record from the drop-down menu (Exhibit 4.5).

Note: If the particular Agency you wish to identify is not in the drop-down menu, contact your system administrator to add it to your Look-up table.

2. Enter the date you wish to use for this entry.

Note: You may want to use today's date, the date the person was referred to you, or the date you received information about their agency contact.

*Note: Check the **Referred In Check Box** when the Agency is the referring source.*

3. Put your cursor in (click in) and key in the **Id Number** field. The ID field allows you to enter up to 25 Characters of either alpha or numeric characters.

Note: This field is intended to be used for the Agency Contact information, i.e., it may be an Agency Case number, OYA, AFS, CW, a Medicaid ID number, a Student ID, a Drivers License number, etc.

*Note: The **Id Number** field is also used when searching against the **Case Number** on the Person Search Screen.*

> *Example: For any unique # entered, CDL will locate the person attached to that # from the Person Search Screen. See (Exhibit 1.1, page 5) for instructions.*

4. Click the **Contact Name** field to enter the name of the person who has responsibility within that Agency for your client.

5. Click the **Phone Number** field to enter the phone number of the person at the Agency.

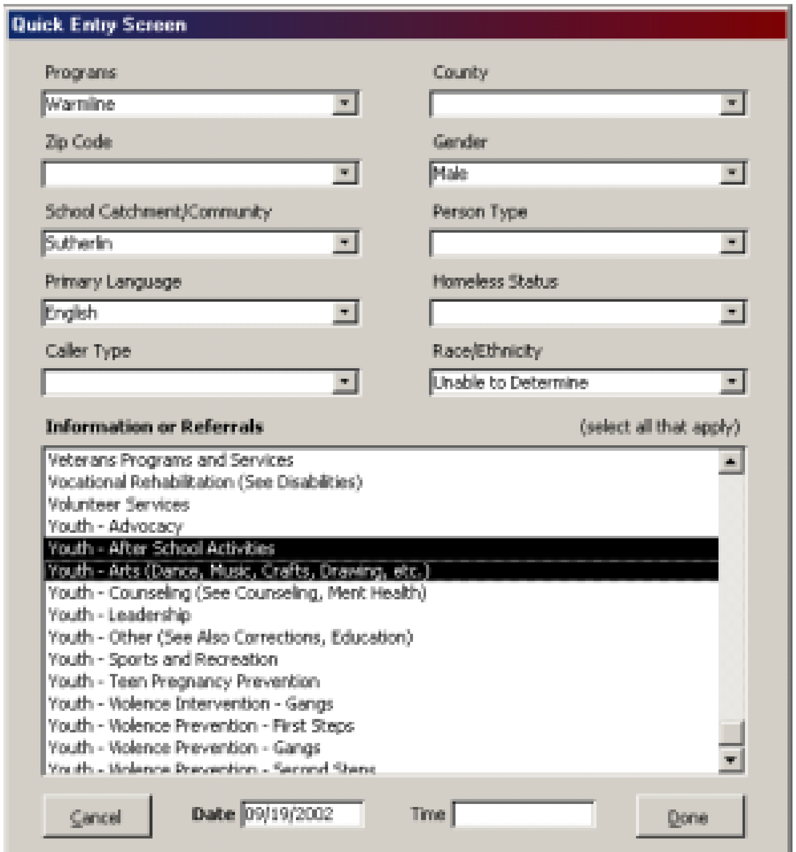
To enter data in the Agency/Contact area, click on the button that says New. After modifying an existing entry click on the **Save** Button.

Quick Entry Screen

This CDL feature was added especially to provide a way for Information and Referral services to track incoming callers who need something. Users of this CDL feature will not be tracking people by name, only as de-identified people (anonymous), why they called and what information or what resource information is helpful for that person.

At any time CDL is open, user may click on the F4 function key on the keyboard to quickly access this feature, OR click on **Quick Entry** from the Main Menu (Exhibit 1.0, page 4).

Exhibit 4.6



1. This screen may be named something else, such as Wendy's Call Log.

2. The 10 fields for users have been pre-identified – from the Program Name to Race-Ethnicity.

3. Every field is flexible and can be re-named.

4. Whether or not a specific field is used is optional. User may choose one, two or more fields.

5. Under program, user may track more than one program by identifying the programs differently.

Example:
User might answer both a Warm Line and a Teen Info Line and track incoming calls for these lines separately.

Note: Another use of the Quick Entry Feature is to track survey responses from a one-time event that identifies needed services in your community.

6. From the Main Menu, click on Reporting, select Standard Reports, and then select Quick Entry to run a report. You can report out quarterly, monthly or weekly statistics, or for any selected time period.

Any anonymous (de-identified) input can be collected and reported through the Quick Entry Screen.

- suggestion box
- survey
- gaps research
- callers or contacts
- community food bank

Note: To be truly quick, keep caller information to a minimum.

Administration

Features and Functionality
Lookup Table Maintenance Screen

CDL Administration Section LookUp Table Maintenance Screen is where optional data is maintained for Users in each of the Pull-down menus. Most Table Names are obviously matched with the Field Names on the various User Screens. Some LookUp Table Names are not so obvious. The Lookup Screen area displays a list of all pull-down menus within the system that you can add, change or delete

The System Administrator should maintain control of all LookUp Table data. CDL comes preloaded with standard data as referenced in this User's Guide. Table information can be changed at any time BEFORE data has been used within the CDL program. Set up is critical. Data within each Table should be reviewed before CDL is put into operation to be certain Table data is appropriate to each User's needs and the User organization's program and reporting functions. Extraneous LookUp Table data should be removed in order to reduce the "clutter" for Users. Too many choices are as inefficient as too few choices. Careful analysis should be undertaken at Set-up as well as periodically as CDL Users begin to enter data, develop reports and gain sophistication.

1. From the Main Menu, select and click on the **Administration** Button
2. From the Administration menu, select **Lookups**
3. In the Lookup Table Maintenance screen, click on the table name drop-down menu to display the list of Lookup Tables in the system
4. Click on the Lookup Table in the menu that you wish to populate or modify.
5. To add text to a new field, place your cursor in the empty field at the end of the list. Note: As soon as you begin to type text, a new empty field will display below your current selection.
6. To change the text, place your cursor in the field that you would like to change and key over the existing text.
7. To delete a field, click on the box to the left of the text and push delete on your keyboard (See example):

Note: If there is data in the database that is associated with this field, you cannot delete until it has been disassociated in all places it was in use.

Making decisions for set-up purposes is the greatest challenge for agencies. Using the system will become second nature.

Tip: In the beginning, we recommend that the Administrator not set many "required" fields. Any new program has a learning curve. We have learned that the learning curve is much shorter if there are few or no required fields set up by the administrator. Once your key (s) learns the system, introduce required fields.

Confidentiality was a high priority for the steering committee so extra care and programming was built in to ensure that confidential information isn't accessible to those who have no need to view it.

This means that the Administrator is the only one with authorization to permit reading, writing or editing information in specific fields. The Administrator may also reset passwords for access to the CDL system and controls access when employees or volunteers change.