SAN FRANCISCO FAMILY RESOURCE CENTER INITIATIVE

CMS DATA ENTRY GUIDE

Guide developed with assistance from Compass Family Resource Center, a program of Compass Family Services

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A. The Basics

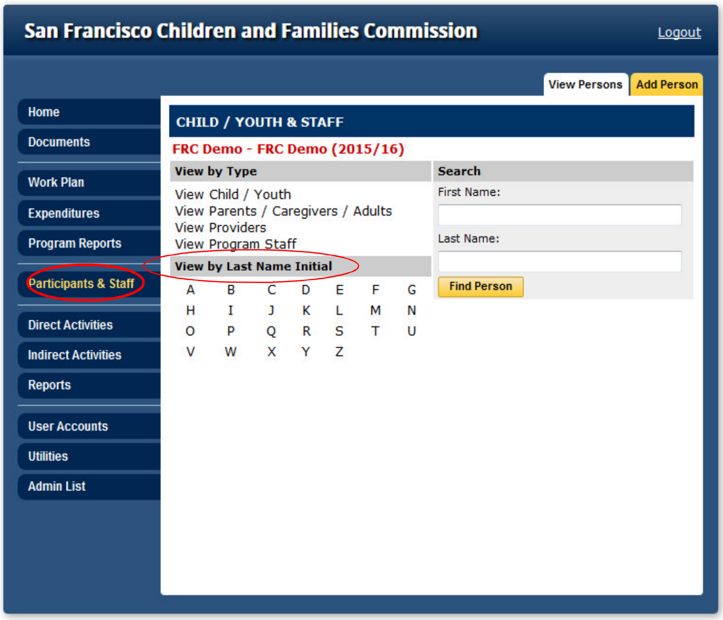
1. **URL Address:** The CMS System log-in page is located at: www.contracts.first5sf.org

2. **Demo Site:** Can be used to practice new skills without impacting any real data. Go to system log-in page and enter the username (frcdemoguest) and password (kidskidskids).

B. Entering Participants or Staff for Enrollment/Assignment to CMS Activities

1. Before entering a new client ALWAYS check to make sure they are not already in the system. Agencies may have hundreds or even thousands of individuals entered in CMS over several years. Sometimes even if a client says they have never been to the FRC, it is worth checking. The best way to check if a participant is already in the system is by going to "Participants and Staff" on the left-side menu and then clicking on the letter their last name starts with and reviewing both active and archived clients to see if they are there. Entering their name in the search field could narrow your search too much and does not allow for the fact they may have been entered previously by a slightly different name. Sometimes a small typo or misspelling can contribute to duplication. Duplicate clients make data collection VERY difficult and result in a lot of extra work.

   Example:



2. Once you have established that you do need to enter a new client, click the 'Participants & Staff' tab on the left side of the screen. Click the 'Add Person' tab on the top right part of the screen. Choose the person's designation next to "Person Type" (Child/Youth, Parents/Caregivers/Adult, Provider, or Program Staff) and then click the yellow "Add Person" button just below the person type categories.

Example:

3. At this point the rest of the registration form will appear for the participant or staff. Fill out as much information as you have as accurately as possible. You MUST enter all items that are starred red (*) or it will not save. Your agency may have specific items to be tracked in the 'notes' section of the registration form, such as typing in your initials so it is clear who completed the data entry, so check with your supervisor about this. When all information is complete, click the yellow 'add' button in the top right corner.

Example:

C. Setting Up a Direct Activity (Group or Individual)

Direct Activities are core services that connect directly to the FRC Initiative outcomes and require enrollment of individual participants and collection of uniquely identifiable participant level data (e.g. name, birthdate, ethnicity, etc.).

1. Click on 'Direct Activities' on the left side of the screen, Choose whether the activity is Group or Individual. See definitions below.

Group: ongoing, connected by a theme and serve multiple participants at a time. Requires entry of individual participant data.

Individual: ongoing, serving one participant at a time. Requires entry of individual participant data.

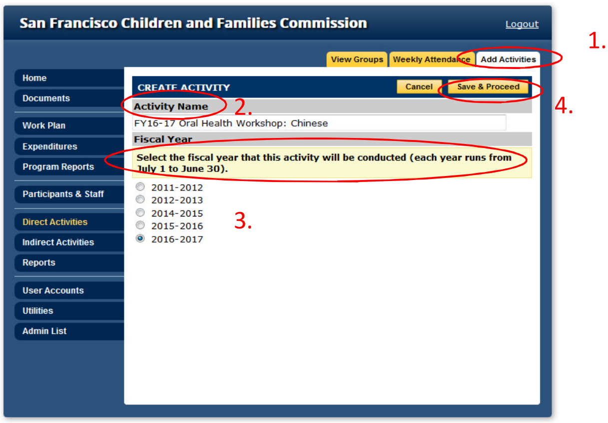
2. When you have determined your Direct Activity Type you will select either "View Group Services" or "View Individual Activities". From here, the first five set-up steps listed below are the same for both Group and Individual.

   Step 1: Click on the "Add Activities" tab in upper right corner.

   Step 2: Type in your activity a name. Remember label activities clearly and by year. *Example: FY16-17 Triple P Parent Education Class: Spring or FY16-17 Differential Response Case Management.* For group activities, it is ok to combine activities that have similar content and serve the same participants. *Example: FY16-17 Early Literacy Series Part 1 and 2*. Group activities that will serve different participants by different locations or languages should be separated. *Example: FY16-17 Oral Health Workshop: English and FY16-17 Oral Health Workshop: Chinese.*

   Step 3: Select the correct fiscal year. Click "Save & Proceed".

   Example:



Step 4: You will then have a series of selections to make and/or information to fill in, including: Essential Service Provided (this is critical to mark correctly, check with your supervisor or First 5 staff if you are unsure); Significant Modality (mark the closest fit); Activity Location (check with supervisor or First 5 staff if you are unsure); and Activity Description (does not need to be lengthy, but should be clear and give information you think it would be helpful for your Program Officer to know).

Step 5: Click "Save & Proceed" in the upper right corner.

3. For purposes of setting up your CMS Work Plan, Steps 1 – 5 above are sufficient. In order to take attendance for Individual Activities you will need to assign staff (See Section E. Preparing to Enter Attendance, #1). In order to take attendance for Group Activities you will need to assign staff, set-up a schedule, and enroll participants (See Section E. Preparing to Enter Attendance, #1 and #2)

D. Setting Up an Indirect Activity

Indirect Activities do not require enrollment of individual participants and collection of uniquely identifiable participant level data. Information on participant attendance is collected in bulk or aggregate form.

1. Click on 'Indirect Activities' on the left side of the screen, Choose whether the activity is Community Events and Presentations, Basic Information and Referral, or Outreach. See definitions below.

Community Events/Presentations: Any social or recreational gathering we host, with the intent of community building amongst our families. This includes baby showers, Holiday party, field trips, etc.

Basic Information and Referral: This is where you log tokens, food bags, and any other tangible client assistance given to clients.

Outreach: Any activity where we are informing the community about our services should be entered here. This includes door-to-door, in-person outreach as well as monthly e-mail blasts and newsletters.

2. Select your Indirect Activity Type and complete the set-up steps listed below.

Step 1: Click yellow "Add Activity" tab in upper right corner.

Step 2: Give your activity a name. Remember label activities clearly and by year. *Example: FY16-17 Dinner and a Movie Nights.*

Step 3: Select the correct fiscal year. Click "Save & Proceed".

Step 4: Complete a brief activity description. Click "Save & Proceed".

Final Note About Activity Set-up: You are not able to create new activities after your CMS Work Plan has been reviewed and submitted to First 5. If you have already submitted your CMS Work Plan and you believe a new activity needs to be added please contact your Program Officer to discuss. Once you receive approval to add the new activity the system can be unlocked to allow for the activity addition.

E. Preparing to Enter Attendance

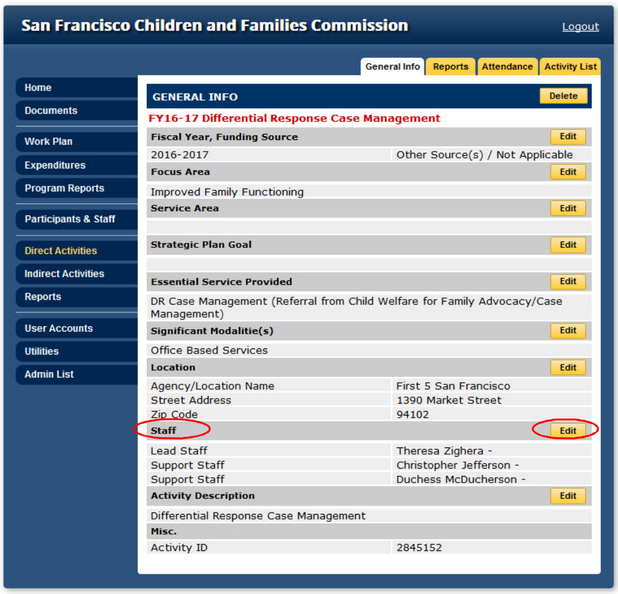
1. For Group *and* Individual Activities you will need to assign staff ***before you can take attendance***. To assign staff to either Group or Individual Activities follow these steps:

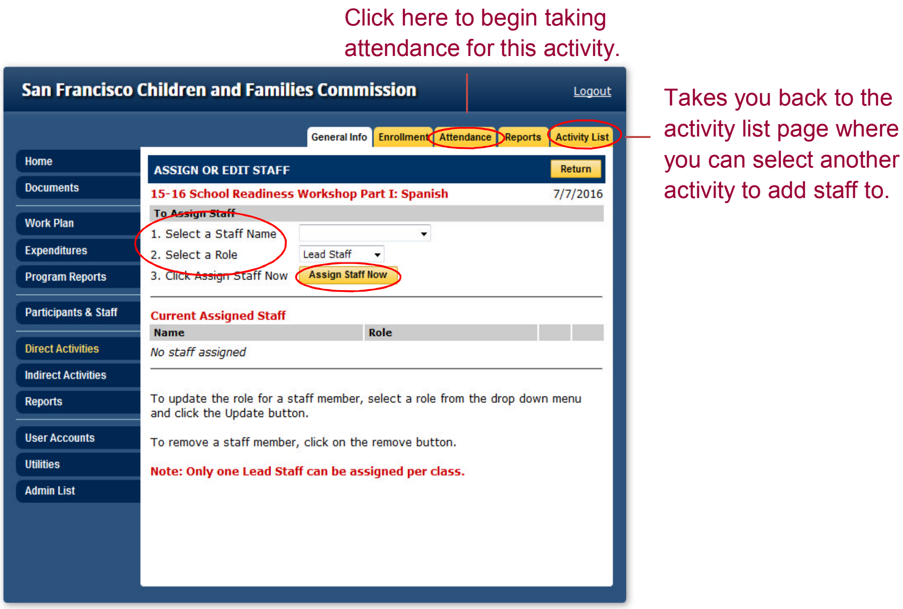
   Step 1: Ensure staff to be assigned have been entered into the system under "Participants and Staff". If they have not, or if you are unsure, refer to the earlier section of this guide: B. Entering Participants or Staff for Enrollment/Assignment to CMS Activities.

   Step 2: To assign staff to a specific activity, go to Direct Activities, click on View Group Services or View Individual Activities, and then click on the activity requiring staff assignment. This will take you to the General Information page for that activity. Click on the line that says 'Staff' and then click the yellow 'edit' button on the right. This will take you to a new screen for assigning staff. Find the staff name on the drop down menu, select a role for that staff (Lead or Support) and click "Assign Staff Now". Continue assigning staff as needed. Only one staff, the primary facilitator for the activity, can be assigned as "lead"; multiple staff can be assigned as "support".

   Step 3: Once all staff have been assigned use the yellow tabs at the top of the page to either begin taking attendance ("Attendance" Tab) or to return and add staff to other activities ("Activity List" Tab).

   Example:

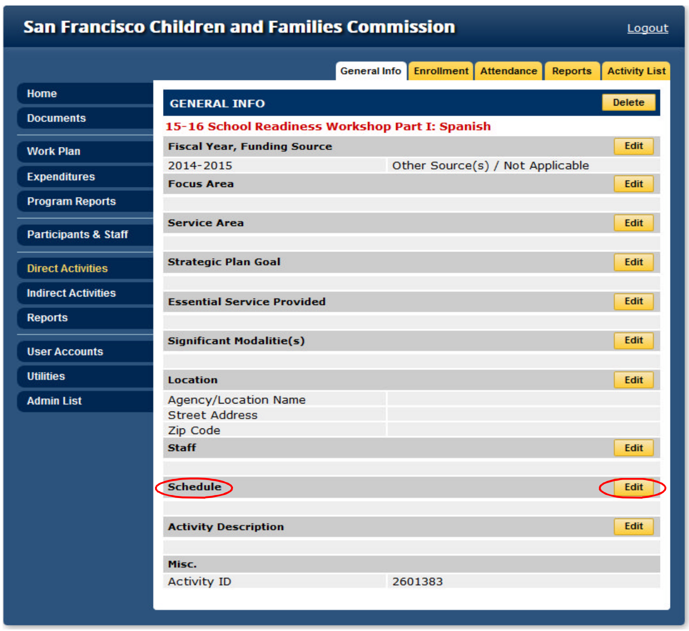




2. For Group Activities you will also need to create a group schedule ***<u>before you can take attendance</u>***.

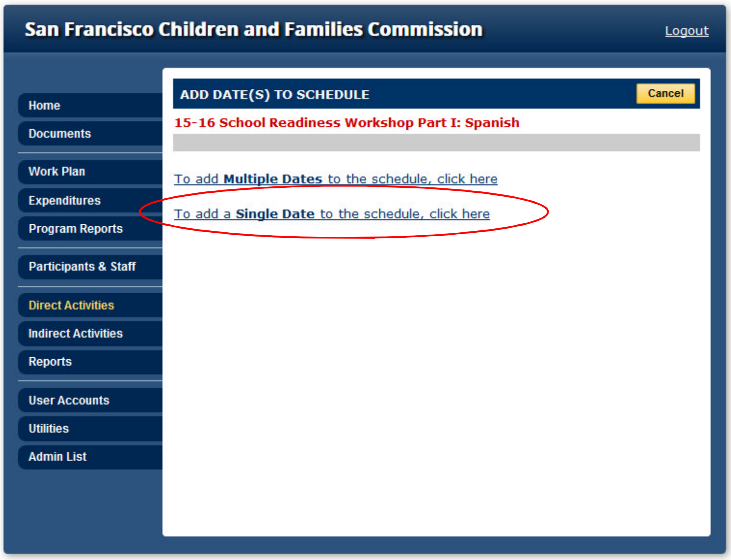
   a. To create a group schedule, select your group activity from the activity list and click on it. This will take you to the General Information page for that activity. Find the line that says "Schedule" and click on the yellow 'edit' button to the right.

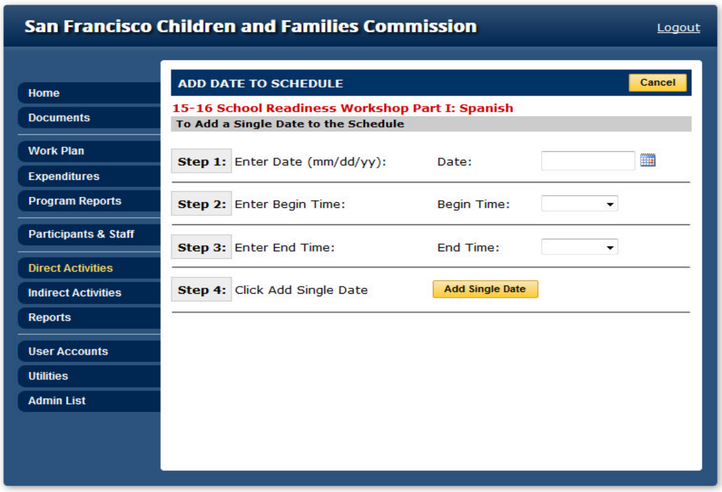
      Example:



   b. If you are creating a ***one-time event***, like a workshop, select the 'To add a single date to the schedule click here'. When the scheduling screen comes up, fill in the date, begin time, end time, and then click "Add Single Date." This strategy also works well for an ongoing group that has an irregular schedule and just a few session dates.

Example:





These are the steps to add a single date to your group activity schedule.

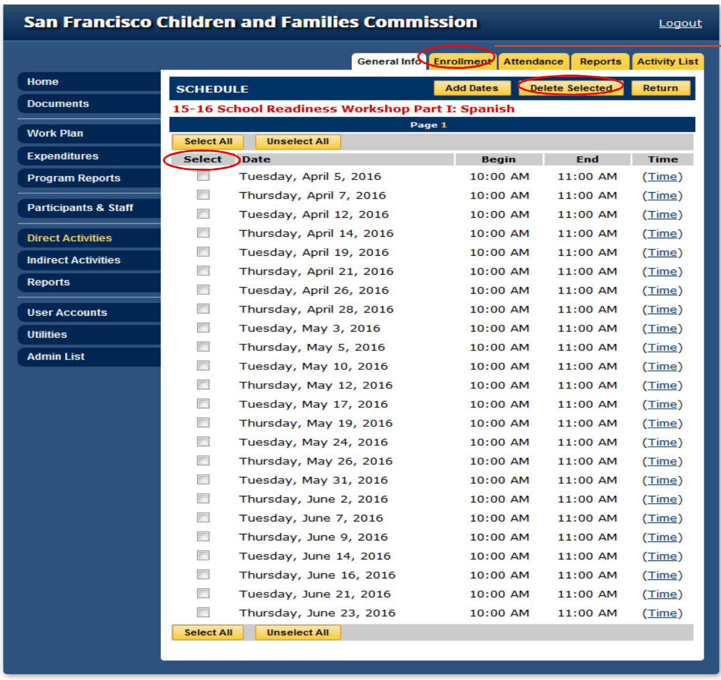
c. To add several weeks of schedule for an ***ongoing group activity***, select ‘To add multiple dates to the schedule click here’. Enter the beginning and ending date range, start and end time for the group sessions, then click “Add Multiple Dates”.

Example:

These are the steps to add multiple dates to your group activity schedule.

d. Please be as accurate as possible so that your schedule in CMS looks as close to “real-time” as possible. For longer running groups it is usually best to only enter a quarter worth of scheduling at a time so that you do not have to predict a whole year’s worth of scheduling in advance.

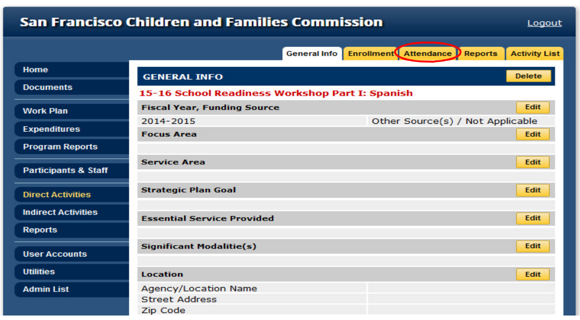
In particular, please ensure that days the group does not meet are deleted from the schedule. Having unnecessary days in your group meeting schedule can result in challenges submitting your quarterly report. CMS will read these days as requiring attendance and if blank the system will not allow report submission. It is typically easiest to schedule the whole range, then return and delete the days that are not needed. Once the dates are entered correctly, it will look like the screenshot below. To delete one (or a few dates) simply click the 'select' box next to the date you want to remove and hit 'delete selected'. If you are about to delete records with participant attendance, it will give you a warning first.



If you would like to go directly from scheduling to enrolling participants, click this tab and see instructions below.

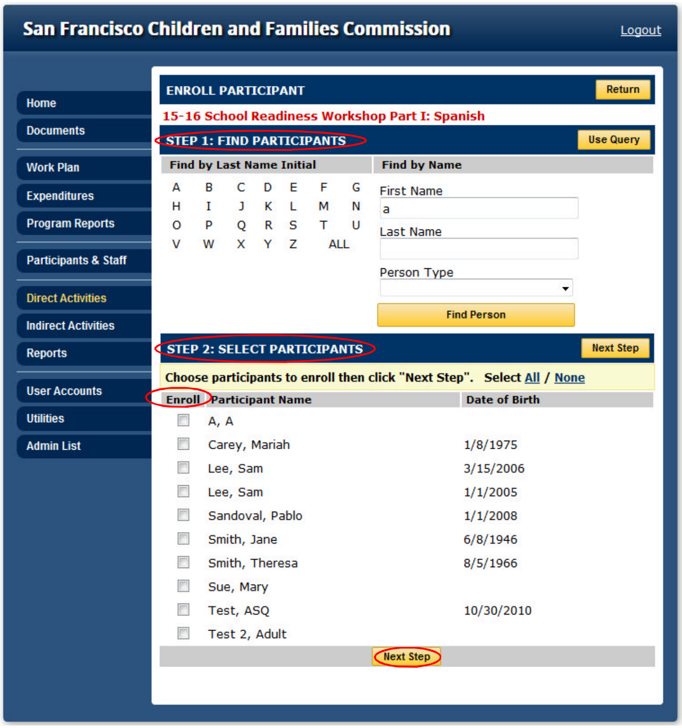
3. Once the schedule has been created, you can complete the last group attendance preparation step, which is to enroll participants. ***Remember:*** *Participants must be first entered into the system before you can enroll them in groups. If you have not yet entered your participants in CMS or are unsure if they are entered see Section B of this guide: Entering Participants or Staff for Enrollment/Assignment to CMS Activities.* Once you are assured your participants are in the system, you can complete the enrollment steps below.

   Step 1: To enroll, click on the yellow 'Enrollment' tab on the top of the activity schedule screen (see screenshot above). If you have moved out of the activity schedule screen already, you will simply go to your activity list, click on your activity of choice, and then find the enrollment tab at the top of the General Info page (see screenshot below).



Step 2: On the very next screen, click on 'Click here to enroll new participants'. This will bring you to the participant search page. Search by putting in the first initial of the participant's last name and clicking "Find Person" or by clicking on the letters provided. This will provide you with a list of participants matching your search criteria. Locate the person you intend to enroll and click the 'enroll' box next to their name. If other participants are listed that should also be enrolled in this activity, you can click multiple names at a time. Then click "Next Step".

Example:



Step 3: The next screen will allow you to select the enroll date by a) entering your own date; b) setting to "today's date"; or c) setting to "beginning of service". Note: the system will have a default date already entered based on the activity's beginning service date. Be sure to adjust this if it is not the actual date the participant first attended the group.

If you are enrolling just one participant you will set his/her date only. If you have multiple participants, you will set a date for each using the above choices. You may enter different enrollment dates for different participants if they did not all start at the same time. Once enroll dates are correctly set for all participants, click "Next Step".

Example:

Step 4: If you have mistakenly entered enroll dates that fall outside the range of the activity's start/end date, the system will give you an error message and you will have to check and adjust.

The system will also give you notice if it detects any scheduling conflicts (i.e. if participant is already enrolled in a group taking place at that exact same date and time). It will show the conflicts and allow you to disregard (we do not recommend this) or cancel so you can check and adjust your dates (we **do** recommend this). If all dates fall within the activity schedule and there are no scheduling conflicts, the system will send you to a confirmation page. If all looks good, click "Done".

Note: You can enroll participants from their participant registration screen, by clicking the yellow "Activities" tab at the top of the participant registration page. This tab will take you to a list of activities the participant is previously or currently enrolled in and will give you the option of adding a new activity. If you click "Add Activity" a list of all the group activities that participant is **not** enrolled in will appear. Select one or multiple activities if applicable and click "enroll". From there the steps are very similar to above.

Example:

This tab takes you to the main participant registration page. The activities tab shows you the activities the participant is currently enrolled in.

These are activities the participant is currently enrolled in; to see all the group activities the participant **is not** enrolled in go to the "add activity" button.

F. Entering Attendance for Group Activities

1. Once the schedule has been set and participants have been properly enrolled into their groups, you can enter the attendance records *(If you have not yet completed these steps see Section E: Preparing to Enter Attendance)*. Go to your group activity list and select the group for which you will be entering attendance. From the activity General Information page, click the 'Attendance' button on the top of the screen. This will give you a list of all the weeks in that activity's scheduled date range. Click on the date you want to record attendance for and you will see all the currently enrolled participants.

   Example:

Be sure to click this box after you have clicked off and saved your attendance so that your attendance registers in your quarterly reports.

2. Check off all participants that attended the schedule group days that week. If all enrolled participants were present, you can click 'all present' and it will check them all off. When the attendance has been entered in full, click the 'completed' box in the top right corner. This **MUST** be checked or your attendance will not register as complete when it is time to submit your quarterly reports. Don't forget to save the data as well. Before returning to enter another week or exiting the system.

G. Entering Attendance for Individual Activities

All one on one meetings, home visits, and any other substantive interactions with a client should be logged under 'individual activities'. If you are unsure if you should log an encounter, or do not know which category to count it as, please talk to your supervisor to determine.

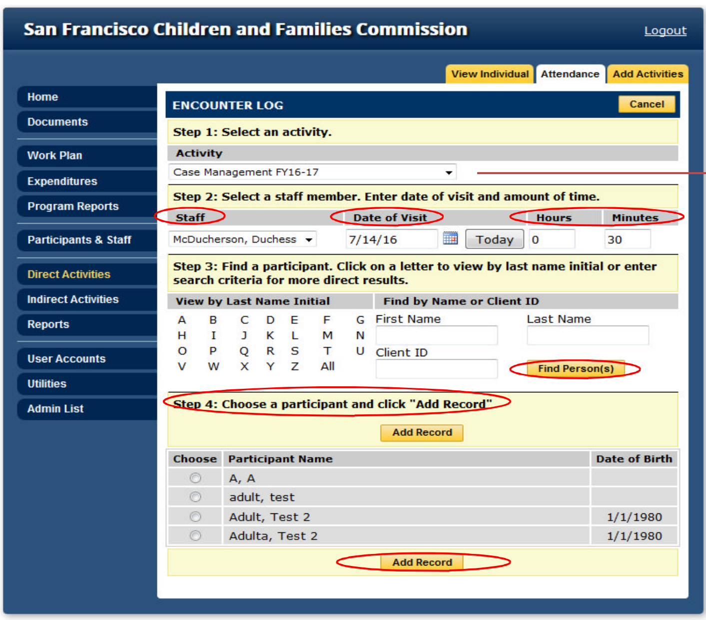
1. Go to your list of Individual Activities, by clicking the 'Direct Activities' button on the left hand side of the screen and then 'View Individual Activities'. Select the activity that corresponds to the encounter you would like to record.

2. This will take you to the Individual Activity's General Information page where you can verify under the staff section whether staff have already been assigned to the activity. ***Remember:*** *to be able to take attendance you must have first entered the participants and staff into the system and assigned the staff to the activity. If you have not done this and/or are unsure, please revisit Section A. Entering Participants and Staff and Section D. Preparing to Enter Attendance.*

3. Once you are sure participants and staff are in the system and staff are assigned to the activity, click the yellow 'attendance' tab on the top right of the Individual Activity General Information page. If this is the **very first** encounter for this activity you will see the screen below, at which point you should click "add" near the upper right corner. This will take you to the Encounter Log page. If this **is not** the first encounter for the activity, skip to step 6.

4. To complete the Encounter Log you must select the staff person, date of visit, and length of visit in hours and minutes. ***Note:*** *you must enter a numerical value in BOTH hours and minutes, even if that number is 0*. The activity name should already be selected near the top as a default, but if not adjust the activity name using the drop-down. Search for the participant involved in the encounter by entering in the first initial of the last name and clicking "Find Person". This will bring up a list of persons matching your search. Locate the correct person from the list and click the circle next to their name. Then click "Add Record". If multiple people were involved in the session search for and select the primary caregiver. You will have an opportunity to add others to the contact session once you get to the encounter record in the next step.

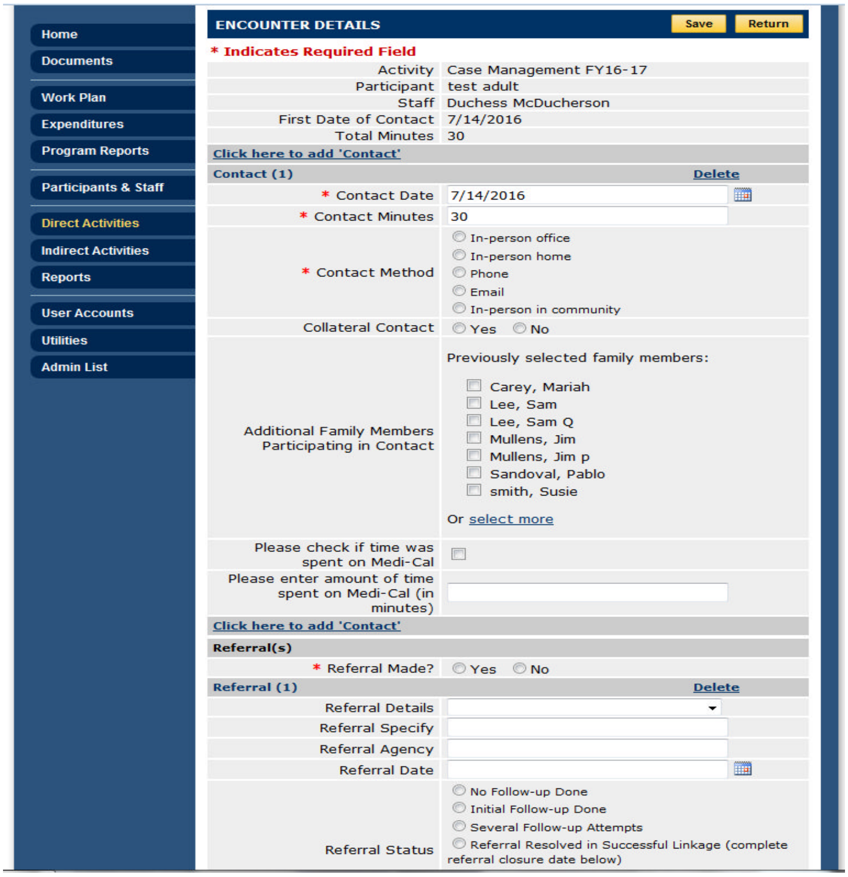
   Example:



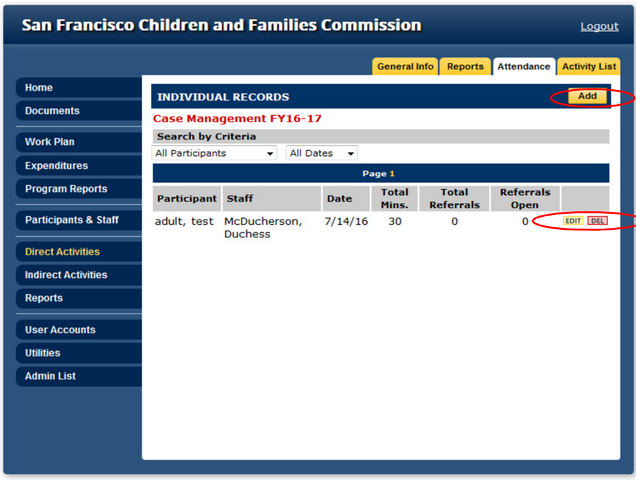
The activity name should already be filled in, but check it and adjust if needed.

5. After you add the initial record for that participant by completing the Encounter Log, the system will take you to the Encounter Details page. Complete all the sections with the red (*), indicating that they are required. If applicable, please complete the sections on collateral contact, additional family members, and time spent on Medi-Cal. Your agency may also like you to add in detail about any referrals given during the contact and to complete notes for the contact. Please check with your supervisor to ensure you are following your agency's protocols. Be sure to save the record when you are finished.

   Example:



6. If this **<u>is not</u>** the very first encounter for this activity you will see the screen below. From this screen, you can either locate the participant for whom you are recording an encounter from the list provided (if he/or she has already had previous encounters); or you can click "add" in the upper right corner to add the participant's first encounter record.

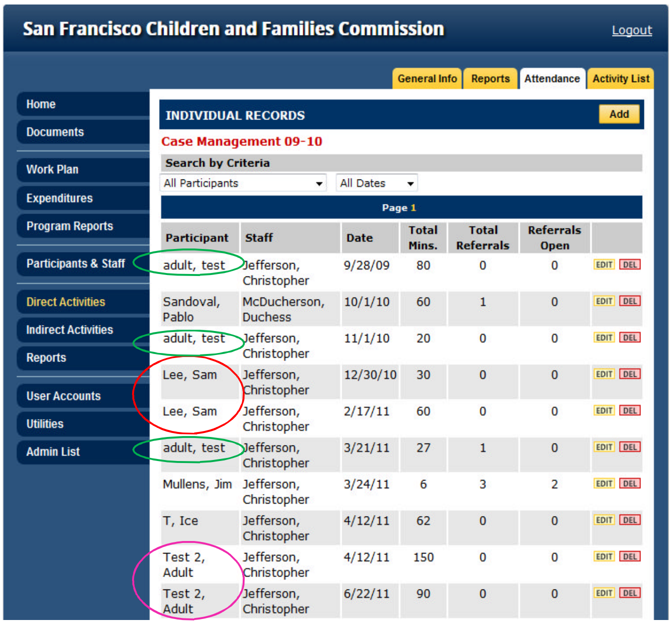


If this is the first encounter for your participant and you do not see their name on the participant list then click "add" to initiate their encounter record.

If the participant already has an encounter record his/her name will be on this list. Click edit and add the new contact to their ***existing*** encounter record.

a. If you click "add" to enter the first encounter record for this participant see steps 4 and 5 above.
b. If this participant already has an encounter record started, you will find the participant from the list provided, then click the yellow edit button all the way to the right of their name. This will take you to the Encounter Details where you will select "Click here to add a Contact". From here you can refer to step 5 above. Essentially, it is easiest to manage your records if each participant has a single Encounter Log/Encounter Detail where you keep an ongoing record of all contacts, rather than adding them each time as a new participant with a single contact each time.

Example of What Not To Do for Encounters



Notice that the same participants are listed multiple times. This means each new contact has been set up under a different encounter record. **Instead,** the participants name should only be listed once and the encounter record should list all their multiple contacts. Having one master encounter record for each participant makes your participant list shorter and easier to manage.

H. Entering Attendance for Indirect Activities

Remember: Indirect Activities do not require enrollment of individual participants and collection of uniquely identifiable participant level data. Information on participant attendance is collected in bulk or aggregate form.

1. To take attendance for Indirect Activities, you simply click on "Indirect Activities" on your left-side menu, select the type (either Community Events/Presentations, Basic Information and Referral, or Outreach), then select the activity name, click on the "attendance" tab in upper right, and then click "add". You may also choose to add to an existing encounter. If so, find the date in the list and click "edit" to the right of the date.

   Example:

If you are just adding to an existing indirect activity encounter then find the date and click "edit".

2. Below are the various different attendance statistics you will need for each type of Indirect Activity.

Community Events and Presentations

<u>Time/Duration</u>

- Date of Event
- Time Spent – please put in hours and minutes

<u>Location of Event</u>

- Agency/Location Name
- Street Address
- Zip

<u># of Participants by Participant Type</u>

- # Children/Youth 0-5
- # Children/Youth 6-13
- # Children/Youth 14-17
- # Parents/Caregivers/Other Adults
- # Service Providers (individual)
- # Service Providers (agency)

Basic Information and Referral

<u>Time/Duration</u>

- Start Date
- End Date

<u># of Participants by Participant Type</u>

- # Children/Youth 0-5
- # Children/Youth 6-13
- # Children/Youth 14-17
- # Parents/Caregivers/Other Adults
- # Service Providers (individual)
- # Service Providers (agency)

<u># of Referrals or Information Provided by Area</u>

- Basic Needs/Financial
- Behavioral/Mental Health
- Infant/Toddler Child Care
- Preschool Child Care
- Education
- Employment
- Health Care
- Dental Care
- Insurance
- Legal
- Other

Outreach

<u>Time/Duration</u>

- Start Date
- End Date
- # of Materials Distributed

<u># of Participants by Participant Type</u>

- # Children/Youth 0-5
- # Children/Youth 6-13
- # Children/Youth 14-17
- # Parents/Caregivers/Other Adults
- # Service Providers (individual)
- # Service Providers (agency)

I. <u>Dropping Participants</u>

Agencies have different protocols for when participants should be dropped from a class and/or archived. This also can be a more delicate process in the system as you do not want to inadvertently delete attendance. For instructions on how to drop or archive participants please talk to your supervisor and/or Theresa Zighera at First 5 San Francisco (theresa.zighera@first5sf.org or 415-934-4873)

J. <u>Who's Who on Your CMS Help Team</u>

1. CMS Help Desk 866-469-6884 (toll-free)

- Authorized Signatory Changes and Passwords
- Technical Glitches

2. Shelli Rawlings-Fein (415) 437-4652

- Adding/changing activities, performance measures changes, quarterly reporting questions/issues/extensions
- Budget and invoicing

3. Theresa Zighera (415) 934-4873

- Everything Else