# OunceNet


# Manual

the Ounce
OunceNet
Ounce of Prevention Fund
Illinois Birth to Three Institute

**Version: February, 2010**

# Table of Contents

# Introduction

OunceNet is the web-based data and outcome tracking system for Illinois Birth to Three Institute (IBTI) Pregnant and Parenting programs throughout Illinois. Through their program Abstracts, IBTI programs agree to serve a predetermined number of participants by providing Home Visiting, Doula services, group services, and other prescribed activities. These services are designed to help create improved health and development for both child and parent; healthy parent-child relationships; increased parent self-sufficiency; and fewer subsequent pregnancies.

The OunceNet system provides a tool for programs to track the number of participants enrolled, and to determine the services these participants receive. The system assists programs in comparing the expectations set for their programs through the Abstract to the actual performance of the program. This provides valuable information to program directors and managers, as well as to the IBTI Technical Assistance and Training staff at the Ounce of Prevention Fund.

In addition to tracking services, OunceNet tracks a number of variables that are indicators of the outcomes each program strives to achieve. Some of these indicators reflect changing characteristics of participants, while others show changes in the participant's children. The system is designed so that programs can track these outcome indicators at various points during the participant's engagement in the program. Typically, the outcome indicators are measured every six months, but the measurement interval varies.

While outcome tracking is the primary purpose of OunceNet, the system can help serve other purposes as well. There are tools in the system that can help with program management (e.g. the Staff Activity report). In addition, there are reports and summary pages for participants that can help Home Visitors and Doulas get a quick glimpse of the participant as a reminder of the participant's current status. Finally, the contractual obligation pages and accompanying reports can help serve important accountability functions.

# *How To Use OunceNet*

# Getting to OunceNet

## Being "On the Internet"

- OunceNet relies on the Internet to communicate between your computer and OPF computers.  This means that when you use OunceNet you are also on the Internet or "on the web", connected not only to your own computer but also to a worldwide computer system.
- If your computer is not connected to the Internet you **cannot** use OunceNet.
- The best way to see if you are on the Internet is to open the web browser called Internet Explorer (IE).  To do this, double click on the Internet Explorer Icon (see right).
- If you cannot access OunceNet using Internet Explorer you should alert your MIS Contact.

## The OunceNet Address

- Once you have opened Internet Explorer, type the OunceNet address in the Address Bar (see right) and hit the return key.
- The OunceNet address is www.opfibti.org.

## OunceNet as a "Favorite"

- The OunceNet site may already be a "Favorite" on your computer. If so, you can skip typing the address and just select OunceNet from your Favorites Menu (see right)
- If OunceNet is not a favorite and you want it to be, go to the OunceNet address and then select "Add To Favorites" from the Favorites Menu.

## Make OunceNet Your Home Page

- If you would like OunceNet to be the first site to come up when you open Internet Explorer you can make it your Home Page.
- While in Internet Explorer go to the Tools Menu (next to Favorites).  Select "Internet Options" at the bottom.
- In the Home Page area (see right) type in the OunceNet address and then click OK at the bottom.

## Make OunceNet a Shortcut on Your Desktop

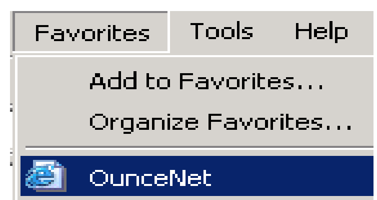
- If you would like to open OunceNet directly from your desktop you can create a shortcut to the OunceNet site.
- While at the OunceNet site go to the File Menu and select Send (see right). Select Shortcut to Desktop.
- Now to open OunceNet you can simply **double click** on the shortcut on your desktop.

## The Internet Explorer Icon

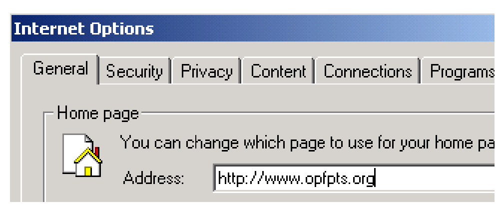

You may find the icon on your desktop, on the bar along the bottom of your screen, in your Start Menu, or in all three places.  To open the program, click this icon.

## The Address Bar

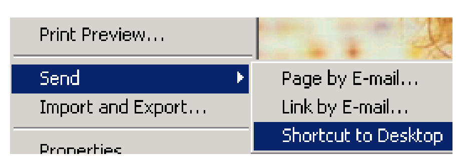

## The Favorites Menu




## Changing Your Home Page




## Creating a Shortcut



# Signing In and Signing Out

## Signing Into OunceNet

- Once you have opened Internet Explorer and gone to www.opfibti.org click PTS OunceNet, then select the Enter OunceNet link.
- Your computer will then open the OunceNet *Sign In* screen. Notice that the address bar and the buttons along the top of the screen are now gone. These things are removed in OunceNet because their use can cause confusing results with data entry.
- OunceNet is a protected system, so to use it you must tell the system who you are by using your Sign In Name and Password.
- Enter your Sign In Name and Password in the appropriate text boxes and then click the Enter button.
- If you do not know or remember your Sign In Name or Password talk to your MIS Contact.

## Signing Out of OunceNet

- When you are signed in you are using OunceNet resources. The fewer signed in users, the more quickly the system operates. Because of this it is much better for everyone using OunceNet if you sign out of the system when you are done using it.
- Click the Quit button, which always appears in the upper right hand corner of the screen.
- **Be careful, the Quit button will not save your work!** Follow all the instructions in the Saving Data section to ensure you do not lose work when you sign out.
- When you sign out, you are brought to a confirmation screen from which you can sign back in. You can leave this screen, which connects you to the Internet, on your computer for as long as you want, or you can close the program and exit the Internet all together.

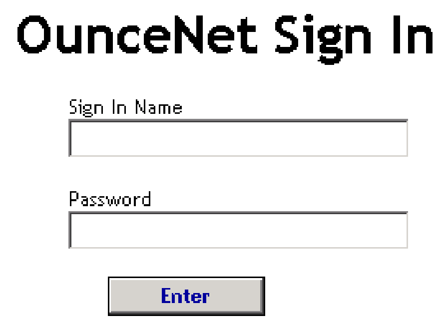
## Timing Out of OunceNet

- If you stay signed in for too long without activity OunceNet will sign you out to conserve resources. **Any unsaved data will be lost, so be sure to save your data often.**
- This is called "timing out." It only happens if you do not click any links or buttons for 15 minutes straight.
- You will not see any change on the screen, but you will need to sign in to OunceNet again before continuing.
- **To avoid timing out remember to save your work often**, including while you are working, when you sign off, and when you leave your computer to do something else.

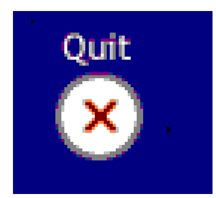
## The OunceNet Links



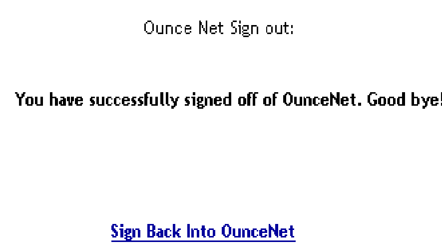
## The OunceNet Sign In Screen




## The Quit Button




## The Quit Confirmation



# Getting Around OunceNet

## Point and Click Once

- OunceNet is a web application- a set of web pages that can be accessed from an individual site. As with most web programs, you get around OunceNet by pointing and clicking. But unlike some programs, in OunceNet you always only click one time, never twice.

- There are two types of things you will be clicking most of the time: Links and Buttons.

## Links and Buttons

- Links are always underlined words; in OunceNet they are usually a shade of blue.

- Buttons appear as words on top of or next to pictures or boxes. Most often the picture is literally a Grey button. To click on the button you can click either the word or the picture.

## Link and Button Behavior

- Most links and buttons are navigational, meaning that they take you from one OunceNet page to another. For example, clicking the Participants button on the *Home* screen will take you to the *Participant* screen.

- Sometimes before clicking a navigational link or button, you have to tell OunceNet something first about where you want to go. For example, before you click on the Select button on the *Participant* screen, you first have to select the participant's name that you want.

- Other links and buttons are not navigational, and only affect the screen you are on. For example, clicking on the Add New Record link on the *Enrollment* screen will create another record on the same screen.

## Examples of Links

Navigational links in the Navigation Bar

Home > Participant >

Navigational links from the *Service Ledger* screen

Enter New Services

Details

An Add New Record link from the *Enrollment* screen

Add New Record

## Examples of Buttons

A navigational button from the *Home* screen

PARTICIPANTS

A navigational button from the *Participant* screen

Select

A non-navigational button from the *Service Ledger* screen

Search

# Getting Around OunceNet

## Color Coding in OunceNet

- There are four main sections to OunceNet, each identified by a color. The color of the outline of a page tells you which section you are in.
- You can always use the color of the page you are on as a general reference to see where you are in the system.

## The OunceNet Logo

- Every screen in OunceNet has the OunceNet logo in the upper left corner of the screen. When you see this logo you know you are using the OunceNet system.

## The Home and Quit Buttons

- Across from the OunceNet logo in the other upper right corner of every screen there are two buttons, one called Home and the other Quit.
- The Home button will always bring you to the *Home* screen, the Quit button will always sign you out.

## The Navigation Bar

- Directly below the Home and Quit buttons is something called the **Navigation Bar**.
- The Navigation Bar is a running list of links showing all the screens you have been to since the *Home* screen.
- The last screen listed is usually the name of the screen you are viewing. So the navigation bar shows you **where you have come from and where you are now**.
- You can always go back to any of the screens you have come from by clicking on the screen's name in the bar.
- **Be careful**, the Navigation Bar will not save your work! Follow all the instructions in the Saving Data section to ensure you do not lose work before using the bar.

## Navigating Between Sections in OunceNet

- If you want to stop working in one section of OunceNet and move to another or even if you are not sure where to go, click the Home button, or the Home link in the bar.
- Then from the *Home* screen you can enter any of the four sections of OunceNet.

## Color Coding in OunceNet

Participant -

Service -

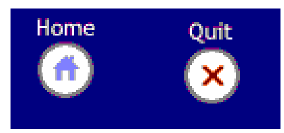
Agency -

Reports -

## The OunceNet Logo

the Ounce OunceNet Ounce of Prevention Fund Illinois Birth to Three Institute

## The Home and Quit Buttons




## The Navigation Bar


In this case you see two links in the bar. As always the first link from the left is the Home link.

The last link tells you where you are now.

In this case the navigation bar tells you that you are on the *Participant* screen, which is one link away from the *Home* screen.

# Entering Data

## Using Different Ways to Enter Data

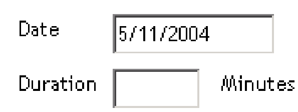
There are five different ways to work with data in OunceNet:

- **Text Boxes**
- **Dropdown Lists**
- **Radio Buttons**
- **Single Pick List Boxes**
- **Multi Pick List Boxes**

### Text Boxes

- A text box is a simple box in which you type information.
- Dates and names are examples of data entered into text boxes.
- To enter data into a text box click on it once and your cursor will appear in the box. When you begin typing, the words will then appear where you see your cursor.

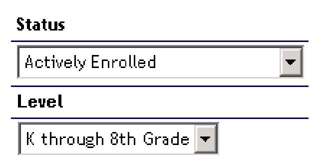
**Text Boxes**




### Dropdown Lists

- Dropdown lists look a little like text boxes but limit what you can enter. You must make a choice from a set list of acceptable answers.
- To use a dropdown list, click once on the little triangle on the right side and then click on the choice you would like to make.
- If the list is long you may have to scroll through it to find your choice. If it is very long try typing the first letter of your choice to find it more quickly. For example if you're looking for Kankakee County in a long list of counties, click on the County dropdown list and type K.

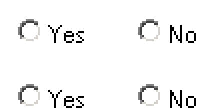
**Dropdown Lists**




### Radio Buttons

- Radio buttons are often used in Yes/No questions, or questions where there are only a few possible responses.
- To use a radio button either click the little circle next to the word(s).
- Once you make a choice the little circle will have a black dot in it. The only way to undo a choice is to make another choice.

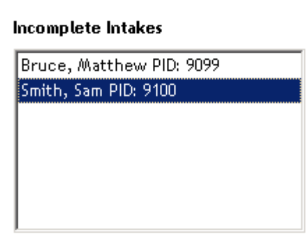
**Radio Buttons**




### Single Pick List Boxes

- List boxes are similar to drop-downs, but the choices are always shown.
- To use a single pick list box use your mouse or scroll bars to find the choice you wish to select, then click on that choice once.

**Single Pick List Box**

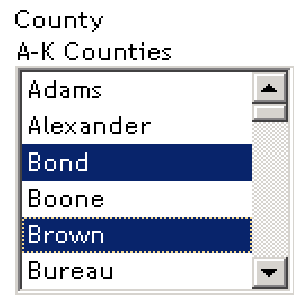


# Entering Data

## Multi-Pick List Boxes

- Multi Pick List Boxes are list boxes that allow you to make multiple selections.
- To select one choice, just click on it. To select more than one, hold down the Control (Ctrl) key as you click each choice. There are two Control keys, each on a lower corner of the keyboard.
- To deselect, hold down the Control key and click the choice.

## A Multi-Pick List Box



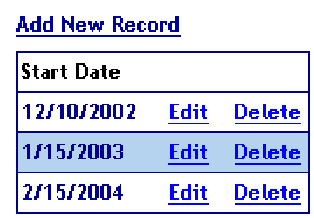

## Data Grids

- A Data Grid is like a mini table on the screen. It allows you to see many records at once and choose the one to work with.

## Adding Records in a Data Grid

- To add a new row to a data grid click the Add New Record link, which is always above the data grid and usually on the left.
- This will give you a new row in **Edit Mode** on the bottom of the grid.
- You can now enter data in that row. **But the row is not saved until you click the Update link.** If you click the Cancel link or any other link (like the navigation bar) OunceNet will **NOT** save your entry.

## A Simple Data Grid




## Editing or Deleting Data in a Data Grid

- To edit a row, click the Edit link in the row you wish to edit.
- This will put that row in Edit Mode. Notice that the Edit link has changed into two links: Update and Cancel.
- You can now change or enter data in that row and only that row.
- **To save any changes to a row, you must click the Update link.**
- To delete a row, click the Delete link of the row.
- Because the Edit and Delete buttons permanently remove data from the system without leaving any record, they are generally only used to correct prior entries that were entered erroneously, not to add to or update prior records. **Use Add New Record, NOT Edit or Delete, to update data grids with new records.**

## A Data Grid in Edit Mode


## The Details Link

- Often data grids are not for entering or editing data, but rather a way to choose a record to work with. The data grid then serves as a link to another screen where the data is entered.
- Data grids like this have a Details link. To go to the screen that has the rest of the data for a row, click that row's Details link.

## The Details Link

# Saving Your Work

## Just Because You Enter It Doesn't Mean It's Saved!

- When OunceNet saves your work, it transfers the data you entered across the Internet to the OPF Computers. This does **not** happen automatically.
- Saving data in OunceNet happens by clicking one of three things depending on which part of the system you are using: Update, Next Step, Submit or Save.

### Saving in a Data Grid

- Click the Update link.
- While in Edit Mode, if you click any link other than the Update Link (such as the navigation bar) OunceNet will **NOT** save your changes to that row.

### Saving in a Step Process

- Click the Next Step button.
- In the Participant Intake process, data is only saved when you go to the next step. So if you enter data on Step 4 and then go to the *Home* screen, your work from Step 3 will be fine, but anything you just entered on Step 4 will be gone.

### Saving On All Other Screens

- All other screens have a big Save or Submit button in the upper right corner of the page below the Navigation Bar.
- You must click the button before you leave the screen to save your work.
- Sometimes, such as in the Service Ledger, clicking the button will automatically take you back to the previous screen. However, clicking Save or Submit usually produces no visible result.

### Things To Remember and Avoid

- Do not click the Home or Quit button or any link in the Navigation Bar without saving your work.
- Do not close Internet Explorer without saving your work.
- Remember if there is no activity on an OunceNet screen for15 straight minutes, OunceNet will sign you out. When you are signed out by OunceNet, **all unsaved work on the page is lost.**
- Whenever you try to save anything, OunceNet will check your work. If you have made errors OunceNet will **not** let you complete and save your work. You must fix all the errors and save it again. See the next section for more about this.

**In a Data Grid**

**Click** Update

**In a Step Process**

**Click** Next Step

**On All Other Screens**

**Click** Save

**Or**

Submit

# Checking Your Work

## Checking Your Work

- OunceNet will **NOT** save data that contains errors the system can detect.  Instead, it will give you error messages in one or more of these three ways:
  - #1.  A little red asterisk (*) next to each error
  - #2.  A pop up box describing the error or errors
  - #3.  Text in red near the top of the page that describes each error in much more detail
- Asterisks and pop up boxes appear together. Red Text on the page appears independently and is much less common.
- Remember if you get errors, it means that your work has **not** been saved. <u>You must fix the error and then save again.</u>
- If you get an error message that you don't understand or cannot fix, then talk to your MIS Contact or call the OunceNet Team.

## What Errors Does OunceNet Look For?

### 1. Missing Required Fields

- Most fields in OunceNet are required fields. If you try to save a record without entering a required field, you will get an error message.

### 2. Bad Dates and Times

- Dates should follow the format mm/dd/yyyy, so October 15, 2004 becomes 10/15/2004. You can also write 2004 as 04.
- Times should follow the format 00:00 AM/PM, so 3 PM would become 3:00 PM. You must always indicate AM or PM.
- Dates must also be within an acceptable range- not in the future or too far in the past.
- If a date or time is in the wrong format or out of range, OunceNet will tell you "The date is not acceptable."

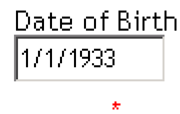
### 3. Bad Numbers

- Number fields should only have numbers entered. If you enter the letter y in the "Duration in Minutes" field, this will be an error.
- Some number fields only accept a range of numbers. If you enter an FTE of 105% for a staff person, you will have an error.

## Look For Your Own Errors

- The best way to deal with errors is to check your own work before you try and save it. In the end, this will save you time.

## Red Asterisks Appear Next To Fields That Have Errors

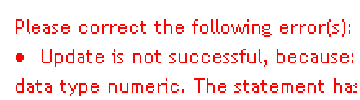



## Pop Up Boxes Appear When You Try to Save Data With Errors.

## You must Click OK.


## Sometimes Red Text Will Appear At the Top of the Page

## These Errors are less common



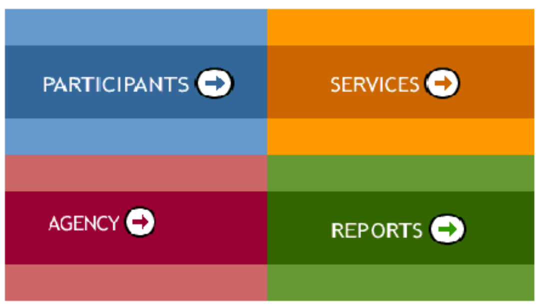
## Sections of OunceNet

### Participants

- Intakes
  - Intake Step Process
- Updates
  - Participant Information
  - Components, Status, Assignments
  - Outcome Indicators
  - Intake Updates
  - Prenatal and Child

### Service Ledger

- Individual Contact
- Home Visit
- Doula Services
- Group Services
- Community Education
- Referrals
- Meetings
- Supervision




### Agency

- Staff
- Groups
- Referral Library

### Reports

- Listing Reports
- Administrative Reports

# *Participants*

# Participant Screens

## INTAKE DATA

***Intake Step 1: Basic Information***

*>Step 2: Assessment*

*>Step 3: Enrollment*

*>Step 4: Service*

*>Step 5: Staff Assigned*

*>Step 6: Demographics*

*>Step 7: Contact Information*

*>Intake Complete*

## UPDATE DATA

***Participant Information***

- *Enrollment*
- *Service Intensity*
- *Group Assigned*
- *Staff Assigned*
- *Intake Data*
  - *Address*
  - *Marital Status*
  - *DCFS Ward Status*
  - *FSC Assessment*
- *Outcome Indicators*
  - *Service Plan*
  - *Transience*
  - *Parental Efficacy*
    - *Parental Efficacy Scale*
  - *Referral Follow Ups*
  - *DCFS Activity*
  - *Participant Patterns*
    - *Participant Patterns Detail*
  - *Birth Plan*
  - *Education Status*
  - *Employment Status*
  - *Participant Medical Home*
  - *Birth Control Status*
  - *WIC Status*
  - *Center for Epidemiologic Studies Depression Scale*
    - *Center for Epidemiologic Studies Depression Scale Detail*
  - *Edinburgh Postnatal Depression Scale*
    - *Edinburgh Postnatal Depression Scale Detail*
- *Prenatal and Child*
  - *Child Data*
    - *Child Intake*
      - *Doula Data*
      - *Child DCFS Status*
    - *Developmental Screenings*
    - *Well Child Visits*
    - *Immunization Records*
    - *Father Involvement*
    - *Child Care*
    - *Feeding Status*

## Introduction to Participants

The Participants section of OunceNet is where all data on individual participants is entered and stored. All data entered in the Participant section can be categorized as either Intake Data or Update Data. Intake Data is gathered and entered during the Participant Intake Process, while Update Data is anything entered after that process is complete.

### Intake Data

All participants are entered into OunceNet using the Participant Intake Process. The process is a series of steps designed to ensure the collection of all the necessary baseline data for each participant. However, since participants take part in different types of services, the necessary data may be different from intake to intake. In other words, OunceNet does not necessarily need the same data for every participant entered. Because of this, the OunceNet intake process has been designed to be dynamic. This means that the process may skip some steps for one type of participant, but then require those steps for another. OunceNet will know what kind of intake to perform based on the information you enter.

The most important determinant for what type of intake you will perform is the choice you make in Step 1 for the field Intake Type. There are three options for this choice: Full Intake, Doula Only, and Group Roster Only. The choice you make will allow you to complete one of five types of intake.

If you select Full Intake, there are three possibilities for the intake you will complete:

- **Full Intake at a PTS/HFI Site –** This intake is for participants at a PTS/HFI program who are enrolling with an FSW. They must complete all of the intake process; none of the steps are skipped.
- **No Enrollment Intake at a PTS/HFI Site –** This intake is only for participants at a PTS/HFI program who are not enrolling after the FSC Assessment. It starts exactly like a Full Intake, but on Step 2 after entering the Assessment data, the user chooses to end the intake. At that point all data entry for that participant is complete, although the user has the option of entering a referral service as well.
- **Full Intake at a PTS Site -** This intake is for all participants who are enrolling in a PTS program that does not perform the FSC Assessment. They skip Step 2 where the FSC Assessment is entered and proceed directly to Enrollment after Step 1. They do not skip any other steps.

If you select Doula Only, you will complete a **Doula Only Intake**. This intake is for participants at either a PTS-Doula or PTS/HFI-Doula program who are enrolling with only a Doula and not an FSW. They also skip Step 2 where the FSC Assessment is entered and proceed directly to Enrollment after Step 1. They do not skip any other steps.

If you select Group Roster Only, you will complete a **Group Roster Only Intake**. This intake is only for participants who are not going to be assigned either an FSW or a Doula, but who will be participating in Group Services. They skip almost all of the steps since very little data is collected about them. They must, however, be assigned to a group, and they must have some Contact data entered in the final step.

Once you have completed the Participant Intake Process for a participant, you are assured that there is no more Intake Data to enter. All you have to enter afterwards is Update Data.

### Update Data

Update Data is any information that you expect to change on an ongoing basis. Enrollment or education statuses, child screening records, and service data are all examples of Update Data. In contrast, Intake Data is any information that you hope to enter only once. It includes things like ethnicity, birth dates, and addresses- things that change infrequently, if at all. OunceNet has tried to make things easier by keeping Intake Data in one place and Update Data in another. All Update Data is entered on common screens, which means information is both more easily entered and more easily available.

Almost all of the Update Data for a participant can be accessed from the *Participant Outcome Indicators* screen. Whether you intend to update Education or WIC Status, Service Plans or Referral Outcomes, the screen you want to visit is the *Participant Outcome Indicators* screen. This screen is accessed from the *Participant Information* Screen, the first screen you see when you select a participant. This first screen is an Update screen in its own right. From here you can access and update Enrollment Status, Service Intensity, Staff or Group data.

### Intake and Updates For Child Data

There is no intake step process for Child Intake Data since virtually all of the data fits on the *Child Intake* screen. As you will see on the following pages, the *Child Intake* screen is accessed from the *Child Data* screen. Once you enter the child intake data, the *Child Data* screen will probably be all that you need for that child's information. It lets you access all of the child areas you will want to update.

## Using the Participant Intake Process

In OunceNet, the Participant Intake Process is used to enter all new participants. The process is referred to as a "step" process, which means you complete a series of steps one at a time, saving each step as you go.

- The OunceNet screens that make up the Participant Intake Process are used together in one **unified process**. Because they are a process, the intake steps must be completed in order.

- The OunceNet system will guide the user through different steps depending on the type of program and the type of participant. OunceNet will automatically skip any steps you don't need for a particular participant.

- Anything you enter during an intake can be edited after the process is complete, either from the last step or from the *Intake Data* screen.

## The Next Step Button


- Use the Next Step button located just below the main Navigation Bar to move through the process. It will:
  1. Check your work for errors.
  2. Save your work.
  3. Bring you to the next step you need to complete.

## Saving Your Work

- Click the Next Step button to move from one step to another. All the data you entered on that step will then be checked and saved.

- **Until you click the Next Step button, the data on that step will not be saved.**

## The Intake Step Bar

**Step1** > Step2 > Step3 > Step4 > Step5 > Step6 > Step7 >

- Below the Next Step button there is an Intake Step Bar showing all the steps of the intake process.

- Completed Steps are blue. Skipped or Incomplete Steps are grey.

- On most screens you can only use the Intake Step Bar to view progress and not to view previous screens. However, on the last screen of the intake, you can use the bar to go back, review and edit any of the completed steps.

## Saving an Incomplete Intake

- If you want to stop entering intake data before the intake process is complete you can use the Navigation Bar to return to either the *Home* or the *Participant* screen.

- OunceNet will save all your completed steps, but it will **not** save data entered on the step from which you exited.

- See the following page for instructions on how to resume an intake that has been saved in this way.

## Completing an Intake

- Most intakes are complete when you enter the required data on Step 7 and click the Next Step button.

- This will lead to the *Intake Complete* screen, from which you can:
  - Review or edit any of the completed steps.
  - Continue to enter data concerning the same participant.
  - Return to the *Home* screen.
  - Sign out of OunceNet.

## Getting to Participant

- From the *Home* screen, click the Participant button.  This brings you to the main *Participant* screen.

## Starting a Participant Intake

- On the *Participant* screen click the Add New button in the lower right corner.

- Click this button only when you want to add a **completely new** participant to OunceNet. If this person is already in the system in any other way, do not begin a new intake.

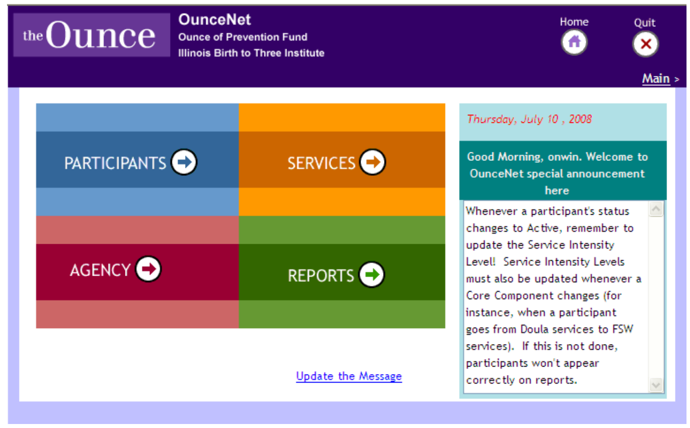
- An intake does not have to be completed all in one sitting. However, no other data can be entered concerning a participant until the intake is complete.

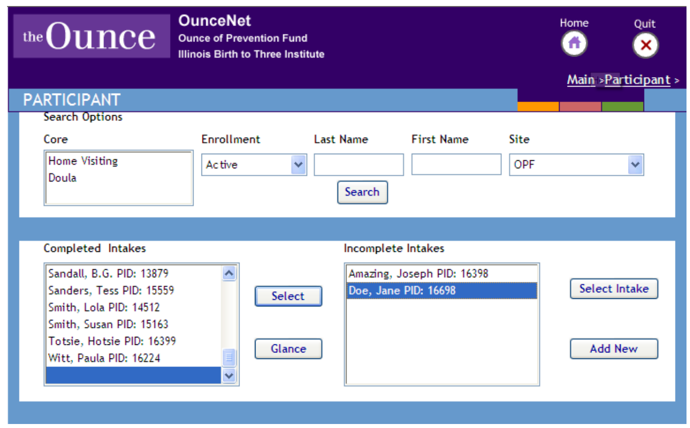
## Resuming a Participant Intake

- If you have already started an intake and you want to get back to it, look for the name of the person in the Incomplete Intakes list box on the lower right side of the screen.

- If you do not see the name you can scroll through the list to find it. The search options at the top of the screen **do not** affect the names in the Incomplete Intake box in any way.

- Once you find the name you want, select that name by clicking on it once. Then click on the Select Intake button to the **right** of the box. This will take you to the last completed step of that intake.




## Quick Steps

To start an intake:

1. Click Participant on the *Home* screen.
2. Click the Add New button in the lower right corner of the *Participant* screen.

To resume an intake:

1. Find the name of the intake you want to complete in the Incomplete Intakes box.
2. Select the name by clicking on it once.
3. Click the Select Intake button to the right of the Incomplete Intakes box.

## Participant Intake Step 1: Basic Information

- This step is very important. Your choices here determine which intake steps OunceNet will include.

### Names and Signed Consent Form

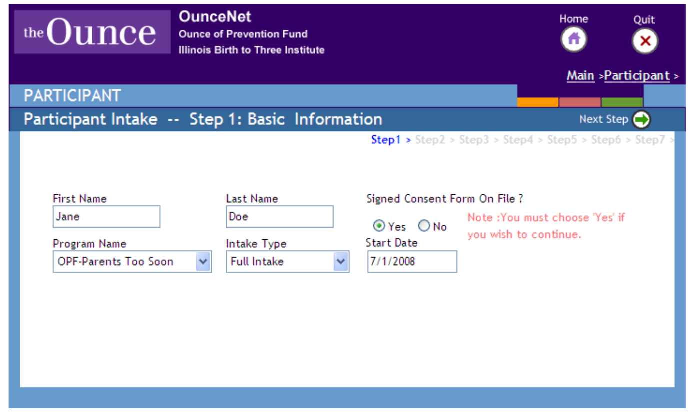
- You must enter both first and last names and click Yes to the Consent Form question before OunceNet will proceed with the intake.
- All participants in OunceNet **must** have a signed consent form on file.

### Program Name

- You must select the program the participant will be entering.
- This choice tells OunceNet what type of program the intake is for.

### Intake Type

- This choice and the program type determine which steps OunceNet will skip as you proceed. There are currently 3 types of intake:
  1. Doula Only Intake: Will always skip Step 2.
  2. Group Roster Only Intake: Will always skip steps 2, 4, 5, and 6.
  3. Full Intake: This intake includes all steps for HFI sites and all steps except step 2 for PTS sites without an HFI program.
- It is **very** important that you make the right choice here, as it will affect the rest of the intake.

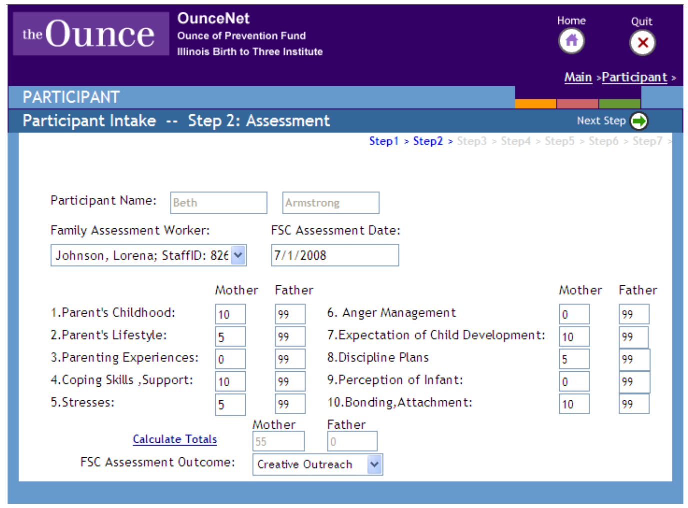



### Quick Steps

1. Enter the new participant's first and last names.
2. Click Yes to the Consent Form question.
3. Select the Program Name.
4. Select the Intake Type.
5. Click the Next Step button below the Navigation Bar.

## Participant Intake Step 2: Assessment

- This step is only completed for participants enrolled in HFI programs. OunceNet will automatically skip this step for other participants.
- In the Family Assessment Worker drop-down list, select the staff person who **completed** the assessment with the participant. This may or may not be the staff person who enters the data.
- Enter the date the assessment took place. Dates in the future are not valid.
- Enter a value of 0, 5, or 10 for each score. A value of 99 indicates that the score is unknown.
- All the Father scores will automatically appear as 99. If you know any of the Father scores you may delete the 99 and enter the score.
- When you have finished entering the individual scores, click the Calculate Totals link.
- OunceNet will not determine the outcome of the assessment even after the scores are totaled. You must manually select the outcome from the FSC Assessment Outcome drop-down list. Options are Creative Outreach, Enrolled, Program Filled, Participant Declined, Not Followed, or Undecided.
- Continue with the intake (or save what has been entered to continue the intake later) by clicking the Next Step button.




## Quick Steps

1. Select the Family Assessment Worker who completed the assessment.
2. Enter the FSC Assessment Date.
3. Enter 0, 5 or 10 for each score. The score of 99 indicates "unknown."
4. Click the Calculate Totals link.
5. Select an FSC Assessment Outcome.
6. Click the Next Step button.

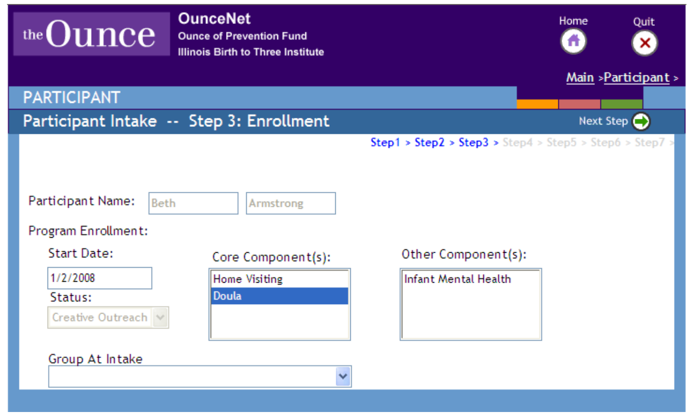
## Participant Intake Step 3: Enrollment

### To Enroll a Participant:

- Enter the enrollment Start Date.
- The Status drop-down list will always appear as Creative Outreach for new participants. Active status does not occur until the first Home Visit.
- Select at least one Core Component. Components vary by program, but the two most common are Home Visiting and Doula.
- Select **both** Home Visiting and Doula Services if the participant is receiving both types of service. To select more than one component, hold down the Control (Ctrl) key when you select each component.
- If the participant will also be receiving Infant Mental Health services, you may select that as the Other Component.

### Group Roster Assignment

- Step 3 also allows for assigning a participant to a group.
- If you are unsure whether the participant will attend a group, you may not want to assign one yet. If this is the case, then simply leave the Group at Intake choice blank. You may then add the participant to the group roster later if and when she attends.
- To add a participant to a group (or additional groups) after the Intake process, use the Groups Assigned link on the *Participant Information* screen.




### Quick Steps

For Multiple Service and Doula Only Intakes:

1. Enter a valid non-future Start Date.
2. Select at least one Core Component.
3. Select Other Component(s) if applicable.
4. Select a Group At Intake if applicable.
5. Click Next Step.

For Group Roster Only Intakes:

1. Select a Group At Intake.
2. Click Next Step.

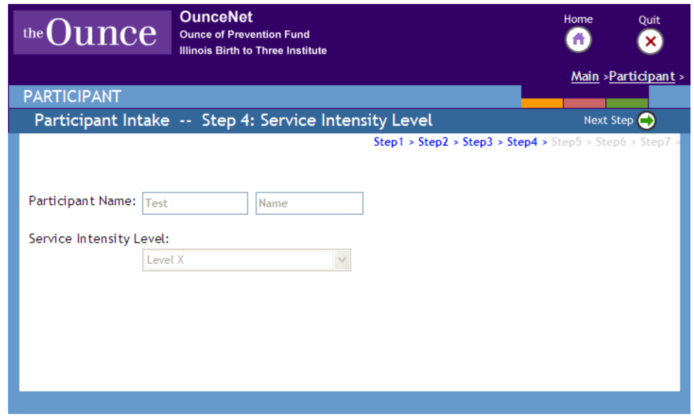
***Participant>IntakeStep1>Step2>Step3***

## Participant Intake Step 4: Service Intensity

- Because all Home Visiting and Doula participants begin as Level X, there is nothing you need to click for this step. Simply click Next Step to proceed to Step 5.

- Participants remain on Level X while they are on Creative Outreach status. When they become Active, they are then assigned a new Service Intensity Level based on the frequency of the visits they are receiving.

- Group Roster Only intakes automatically skip this screen.




## Quick Steps

1. Click Next Step.

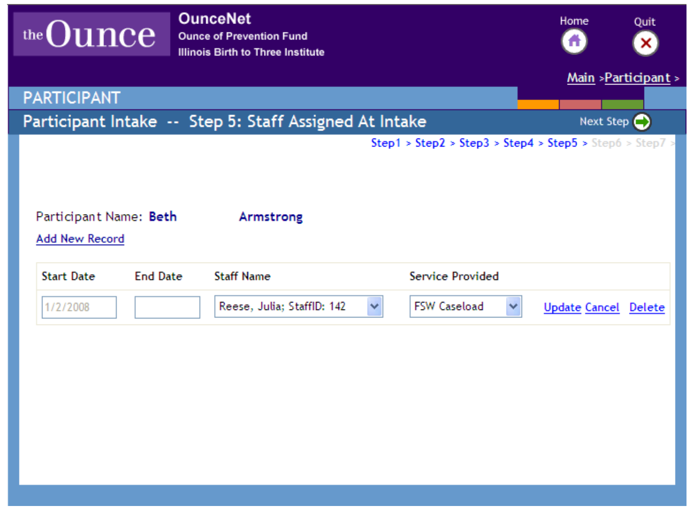
***Participant>IntakeStep1>Step2>Step3>Step4***

## Participant Intake Step 5: Staff Assigned

- You may skip this step if you do not yet know the staff assignment for the participant.
- To skip this step, click the Next Step button.
- If you do skip this step, remember to assign at least one staff person later using the Staff Assigned link on the *Participant Information* screen.

## Assigning Staff

- If you do want to assign staff at intake click the Add New Record link.
- Because the staff assignments here apply at intake, the Start Date will always be the date of enrollment. The End Date should be left blank.
- Select the Staff Name and the Service Provided from the drop-down lists. Identifying the service provided is necessary because often a staff person provides different services to different participants. OunceNet needs to know what services staff are providing with each participant they are assigned.
- Click the Update link in order to save the data you just entered. Clicking any other link at this point would mean the record you just created is not saved.
- To add more staff click the Add New Record link again and repeat the process.




## Quick Steps

To Skip This Step:

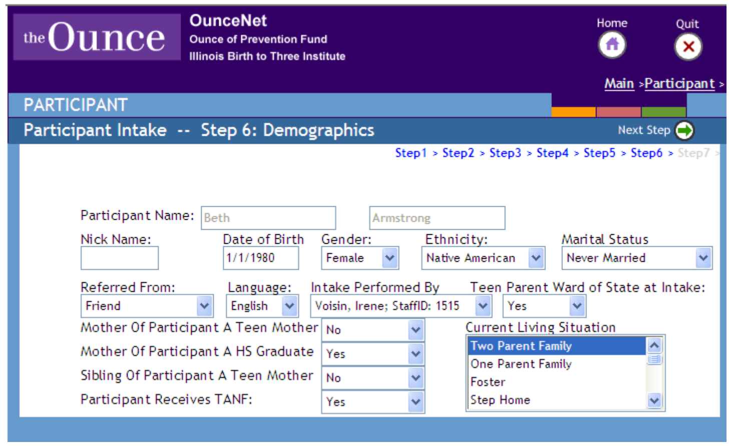
1. Click Next Step.

To Assign Staff:

1. Click Add New Record.
2. Select the Staff Name and the Service Provided from the drop-down lists.
3. Click Update.
4. Repeat steps 1-3 as needed.
5. Click Next Step.

## Participant Intake Step 6: Demographics

- Group Roster Only intakes automatically skip this step.
- Other Intakes must complete all the fields on this step except Nick Name.
- Enter a Date of Birth. The system is designed to only accept participants who are at least 10 years old.
- Select Gender.
- Select Ethnicity, Marital Status, and whether the participant was a Ward of State at Intake. If you do not know the correct choice you may select Unknown. You may specify data later by updating the *Intake Data* screen, accessed through the *Participant Information* screen.
- Select where the participant was Referred From and the participant's Language. If you do not know, select Other, then return to the *Intake Data* screen later to make corrections.
- Select who performed the intake.
- Select whether a participant was a Ward of the State, whether the participant's mother (the teen parent's mother) was a High School Graduate and/or a Teen Mother, whether the participant's sibling was a Teen Mother, and whether the participant Receives TANF. TANF is Temporary Assistance to Needy Families, a form of public aid. Again, the option of Unknown is available as a choice.




## Quick Steps

1. Enter the participant's Nick Name if any.
2. Enter a valid Date Of Birth.
3. Select the Gender, Ethnicity, Marital Status, where the participant was Referred From, Language, who performed the intake, and whether the participant is a Ward of State at Intake.
4. Answer the four additional questions.
5. Select all appropriate answers for the Current Living Situation.
6. Click the Next Step button.

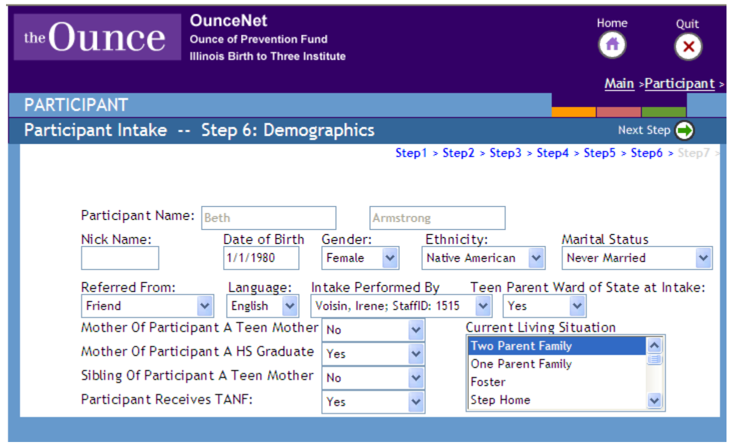
## Participant Intake Step 6 Continued

- For some of these questions you may feel that making one choice is not accurate. A participant may speak both English and Spanish equally well, or perhaps two staff people performed the intake. Things like this may be true, but with the exception of Current Living Situation, OunceNet will not let you move on until you make a single choice for all required fields.

- Use your best judgment, consult your MIS Contact if unsure, and select the choice that you feel best reflects the intake. Remember, you can always go back and make corrections on the *Intake Data* screen.

- The Current Living Situation is the last field on the screen. Select all choices that apply to the best of your knowledge. If more than one of the living situations listed applies to the participant, hold down the Control (Ctrl) key on your keyboard and click any additional options that apply.

- When the screen is complete, click the Next Step button to proceed to Step 7.

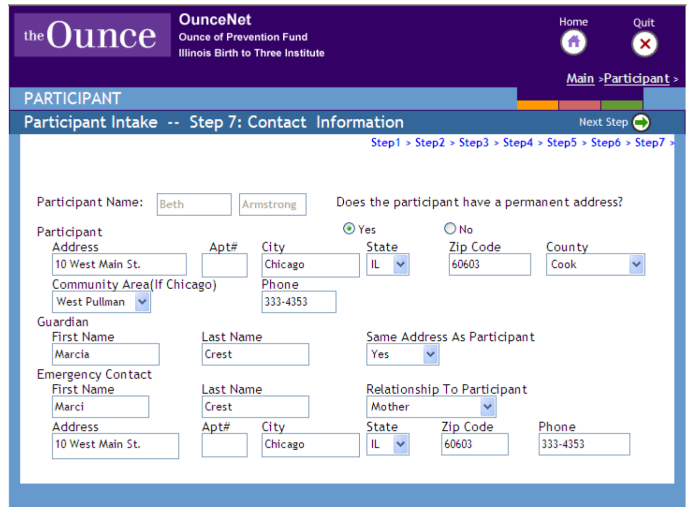


## Participant Intake Step 7: Contact Information

- On Step 7, all participants must complete at least the three required fields. These fields are whether or not the participant has a permanent address, the participant's City, and the participant's County.
- If the participant has a permanent address, you must also enter the Address and Zip Code.
- If the participant lives in Chicago, the Community Area must also be identified.
- For all the other fields on this screen, site management should make their own determination about which data points they expect staff to enter for their program.
- If your program does not require you to enter a field on this page that is also not required by OPF, you may leave that field blank. Check with your supervisor or MIS Contact if you are unsure of your program requirements.

## OPF Required Fields

- For all participants you must:
  1. Answer the question about the participant's permanent address.
  2. Select a County.
  3. Enter a City.
  4. If the participant lives in Chicago, select a Community Area.
- If you answered Yes to the question about the participant's permanent address, you must also:
  1. Enter an Address.
  2. Enter a Zip Code.




## Quick Steps

1. Answer the question about the participant's permanent address.
2. Enter a City.
3. Select a County.
4. Select a Community Area if the city entered is Chicago.
5. If the participant has a permanent address enter their Address and Zip Code.
6. Enter the other required fields for your site.
7. Click Next Step.

## Participant Intake: Completing an Intake

- Once you reach the *Intake Complete* screen, the intake is complete!

- If you leave the intake process before reaching this screen, then your intake will be saved as an Incomplete Intake, which you can return to and finish later from the main *Participant* screen. OunceNet will save the intake from the last screen at which you clicked Next Step.

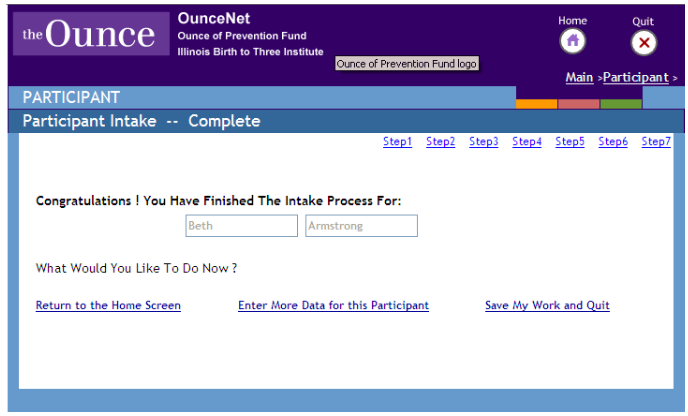
- Unlike any of the prior intake screens, this last screen will allow you to return to and edit any of the steps you have just completed. To do this, click any link on the Intake Step Bar to return to that step.

- If you return to a prior step to make any changes, be sure to click Next Step to save those changes. Then continue clicking Next Step until you arrive at this last screen again. If this isn't done, OunceNet will save your work as an Incomplete Intake, even if you had in fact completed all of the steps earlier.

- From this final screen, choose one of three ways to exit the intake.

- Once you exit this screen you **cannot** return to any of the intake steps; however, you can still access and revise any of the intake data through the *Intake Data* screen. The *Intake Data* screen is accessed through the *Participant Information* screen.

- Depending on what you now wish to do, you may now click Enter More Data for this Participant, Return to the Home Screen, or Save My Work and Quit.




## Quick Steps

1. If you do not need to review or edit and prior steps, click Enter More Data for this Participant, Return to the Home Screen, or Save My Work and Sign Off.

2. If you need to review or edit any prior step, click the link to that step.

3. After you have made any revisions to a prior step, click Next Step to save the changes, then continue clicking Next Step until you return to this screen.

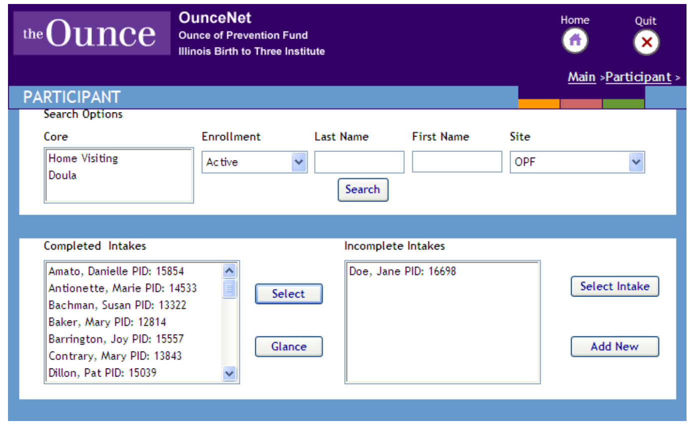
# ***Participant Information***

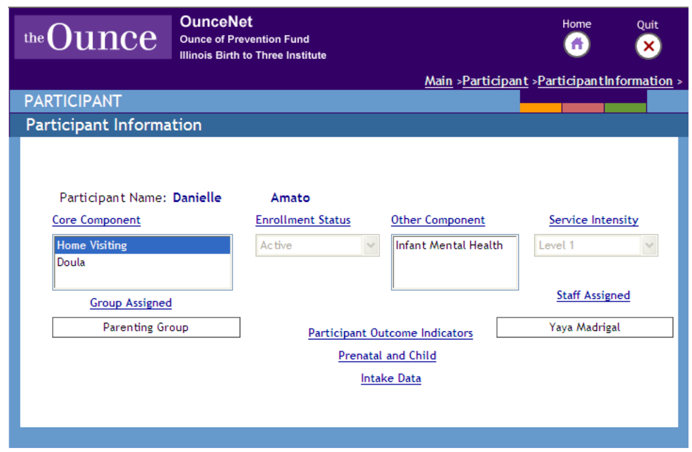
## Participant Information

Once the intake process is complete, the *Participant Information* screen is where you will enter all additional data for a participant.
The *Participant Information* screen is the hub for participant information, serving two main functions. First, it displays the participant's main information such as her current Core Component, Enrollment Status and Service Intensity Level, as well as the Staff and Groups to which she is currently assigned. Second, it is the entry point to the other screens where participant data is entered or updated, including the *Participant Outcome Indicators*, *Prenatal and Child*, and *Intake Data* screens.

## To Display Participant Information

- In the *Home* screen, click Participants. This brings you to the *Participant* screen.
- OunceNet will pull up a list of your currently Active participants in the box on the lower left.
- If you wish, you may filter a list yourself by selecting your choices of Core Component, Enrollment, Last Name and/or First Name, and click Search.
- Once you find the name that you want in that box, click the name and then click the Select button.
- This takes you to the *Participant Information* screen, where the participant's information is displayed.
- The name of the participant you selected will appear at the top of the *Participant Information* screen. This participant's name will also appear on all subsequent participant screens.




## Quick Steps

1. Click Participants in the *Home* screen.
2. To find a participant by name, enter the Last and First Name, or enter their first and last initials in the First Name and Last Name fields.
3. Click Search.
4. If the participant you want does not appear, try changing the Enrollment to All and click Search again.
5. Click on the name of the participant.
6. Click Select.

## Enrollment and Core Components

On the *Participant Information* screen, the participant's current Enrollment Status, Core Component and Other Components are displayed.

## To Enter Enrollment Information

- To add new enrollment information for a participant, simply click on the Enrollment Status link, the Core Component link or the Other Component link on the *Participant Information* screen. Clicking any of these links brings you to the *Enrollment* screen.

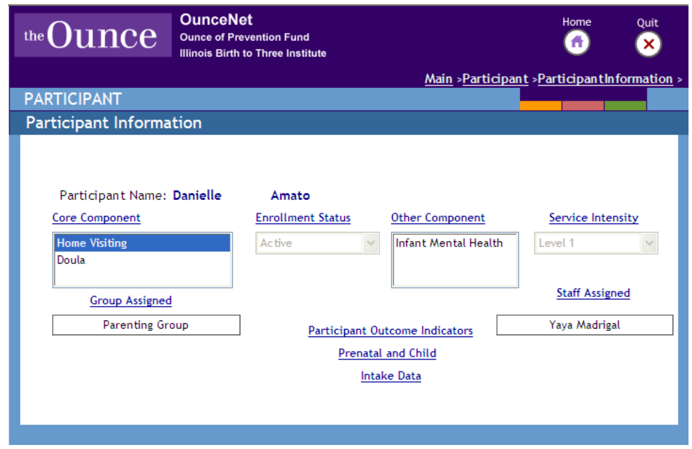
- On the *Enrollment* screen, you may then click Add New Record. Enter the Date of the new enrollment information and then select the new Core Component, Enrollment Status, Other Components, and Program Name. You may select multiple components if they apply.

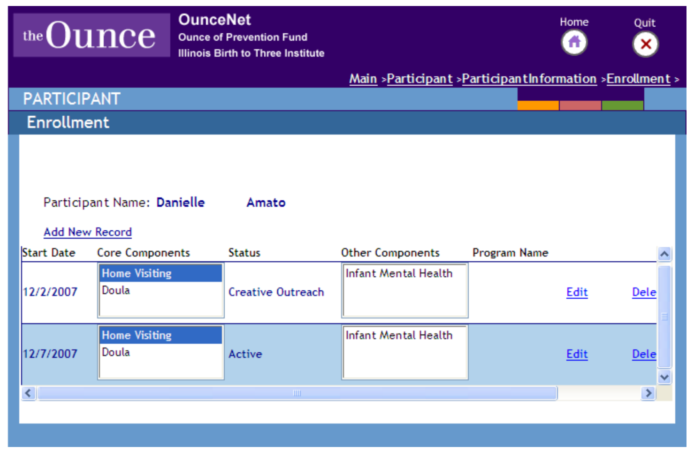
- Click Update to save your new record. Never use Edit to change a prior record unless it was entered incorrectly.

- If you designate an enrollment record as Closed, OunceNet will prompt you to choose a Reason For Closing.

- If you add a new record with a status other than Closed, then you must also add a new Service Intensity record. So for new Active or Creative Outreach records, **always click on the Service Intensity link of the new record after you have added it**.

- **Note:** to close a Doula participant but keep them in FSW Home Visiting, simply add a new record, selecting only Home Visiting as the Core Component. The Doula component will then be closed.




## Quick Steps

1. Click Enrollment Status, Core Component, or Other Component.
2. Click Add New Record.
3. Enter the Date.
4. Select the Core Component.
5. Select the Enrollment Status.
6. Select any Other Components.
7. Click Update.

***Home>Participant>ParticipantInformation>Enrollment***

## Service Intensity Level

The *Participant Information* screen will always display the participant's most current Service Intensity Level. If the enrollment status or frequency of visits changes, you will need to add a new Service Intensity record.

## To Enter a Service Intensity Level

- Click the Service Intensity link on the *Participant Information* screen.

- **Note:** If the enrollment status has also changed (for instance, if you have added Home Visiting services to Doula services) add the new enrollment record first by going to the *Enrollment* screen. If the enrollment has not changed, you may go directly to the *Service Intensity* screen.

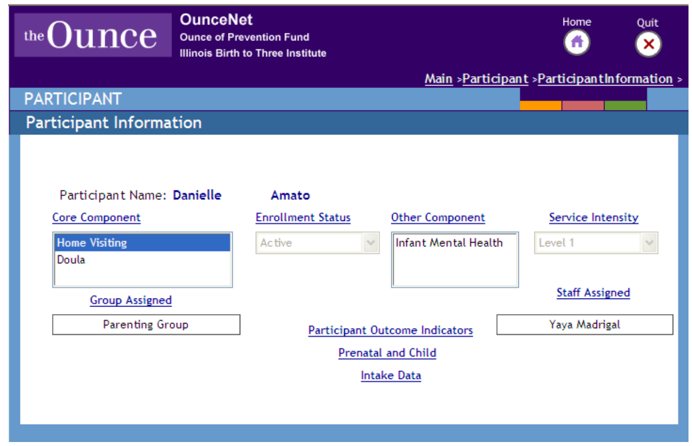
- On the *Service Intensity* screen, click Add New Record. Make sure the components for which you are adding your Service Intensity match those on the screen.

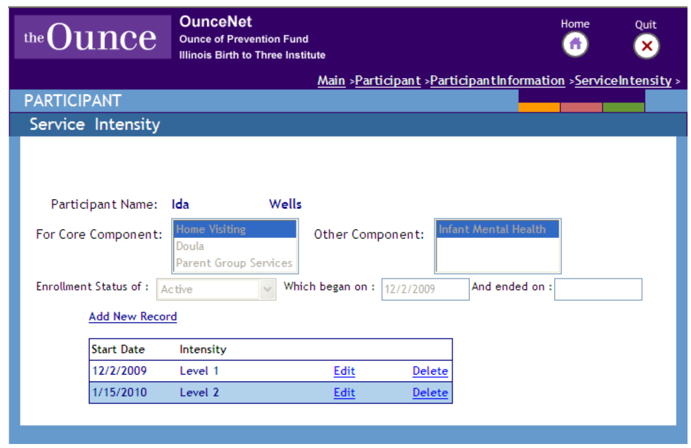
- Enter the Start Date of the new Intensity Level and select the Intensity from the dropdown list. Any Active Doula participants must be assigned the Doula Home Visiting Model Service Intensity Level.

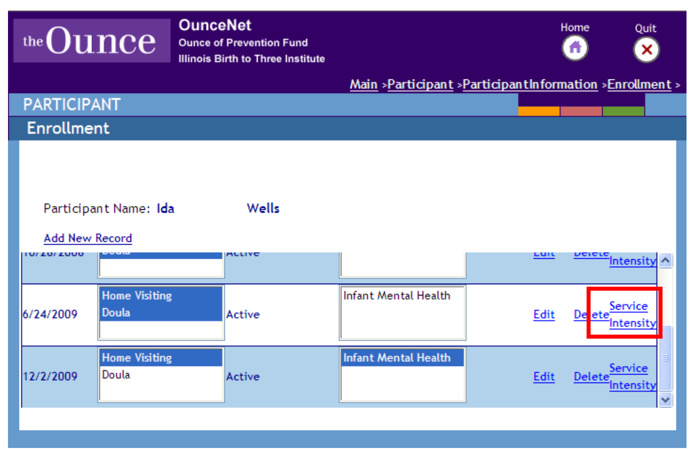
- Click Update to save your new data.

Service Intensity records are contained within enrollment records. Therefore, you must add a new Service Intensity record each time you add a new enrollment record.

**Note:** To view or change the Service Intensity Levels of a prior enrollment status, you must click the Service Intensity link that corresponds to that enrollment record on the Enrollment page (see right).




### Quick Steps

1. Click Service Intensity Level on the *Participant Information* screen.

2. Click Add New Record.

3. Enter the Start Date, select the Intensity and click Update.

***Home>Participant>ParticipantInformation>ServiceIntensity***

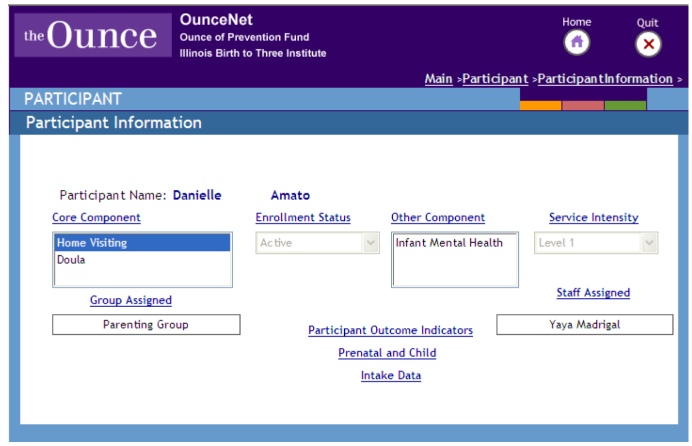
## Group Assignment

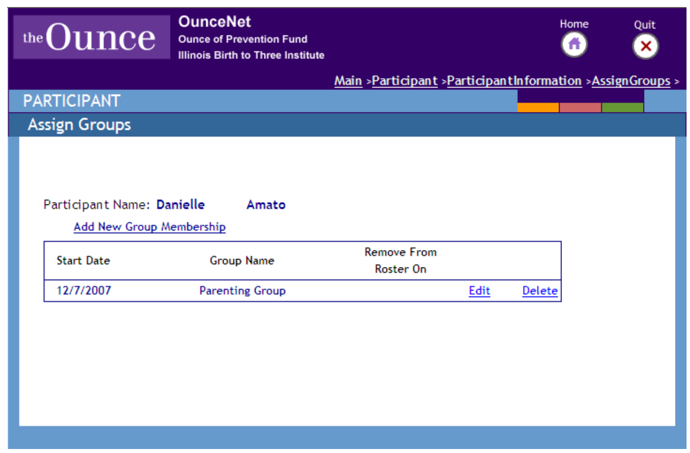
The *Participant Information* screen displays all parent groups to which the participant is currently assigned.

## To Assign a Group Service

- On the *Participant Information* screen, click the Group Assigned link.
- This will bring you to the *Assign Groups* screen.
- Click the link to Add New Group Membership.
- Enter the Start Date and select the Group Name from the dropdown list.
- **Note:** Only groups that have been entered in the Agency section of OunceNet will appear on the dropdown list. If your group does not appear on the list, you will need to enter it in the Agency section before proceeding.
- Click Update to save your record.

You can **remove** a name from a group roster by clicking Edit, then entering the last date you would like them to appear on the list. If the participant never attended a group session and you would like to remove their name from the roster, you may simply click Delete (Delete will remove all past records of attendance, so it should only be used if the participant never attended the group.)




## Quick Steps

1. Click Group Assigned on the *Participant Information* screen.
2. Click Add New Group Membership.
3. Enter Start Date and select the Group Name.
4. Click Update.
5. When the participant leaves the group, click Edit and put a date in the Remove From Roster On field.

***Home>Participant>ParticipantInformation>GroupAssigned***

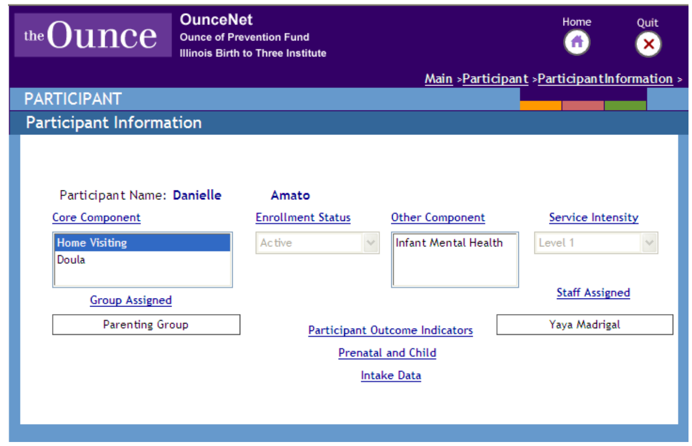
## Staff Assignment

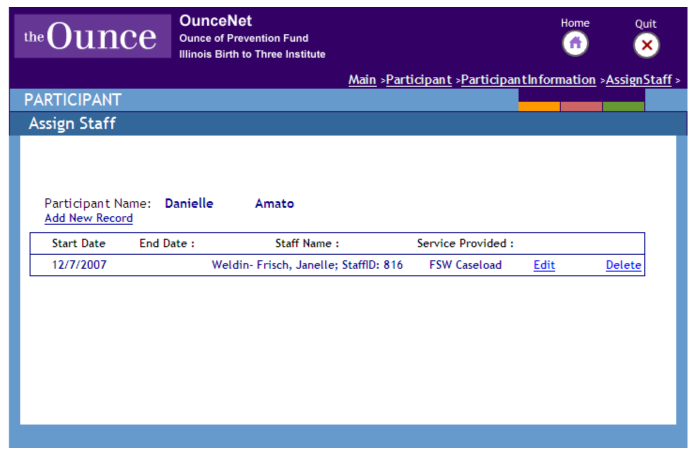
The names of all staff to which a participant is currently assigned will appear on the *Participant Information* screen.

## To Manage Staff Assignments

- On the *Participant Information* screen, click the Staff Assigned link.
- This brings you to the *Assign Staff* screen.
- Click Add New Record.
- Enter the Start Date of the staff assignment.
- Select the name of the staff person assigned to the participant from the dropdown list.
- Select the Service Provided.
- Click Update to save your entry.
- When the participant leaves the program or is transferred to another staff person, click Edit and fill in the End Date for the staff person.
- Click Add New Record and repeat the process above when the participant begins services with another staff person.

Remember that assigning participants to staff has no effect on your enrollment numbers. Participants who are Doula participants are counted as such because they carry a Doula enrollment record, not because they are assigned to a Doula staff person.




## Quick Steps

1. Click Staff Assigned on the *Participant Information* screen.
2. Click Add New Record.
3. Enter the Start Date for the staff assignment.
4. Select the Staff Name.
5. Select the Service Provided.
6. Click Update.

***Home>Participant>ParticipantInformation>AssignStaff***

## Intake Data Updates

To update or review demographic information about a participant after the intake process is complete, you may do so on the *Intake Data* screen.

## To Update Intake Information

- On the *Participant Information* screen, click the Intake Data link. This brings you to the *Intake Data* screen.

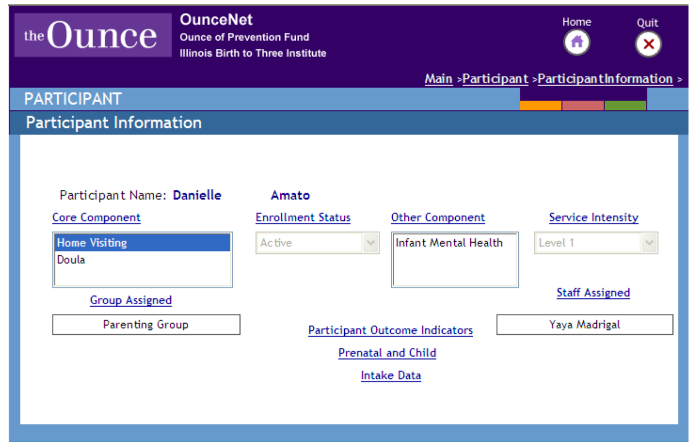
- The participant's demographic data entered during the intake process will appear on this screen. If anything was left blank or entered incorrectly during the intake process, you may update it here.

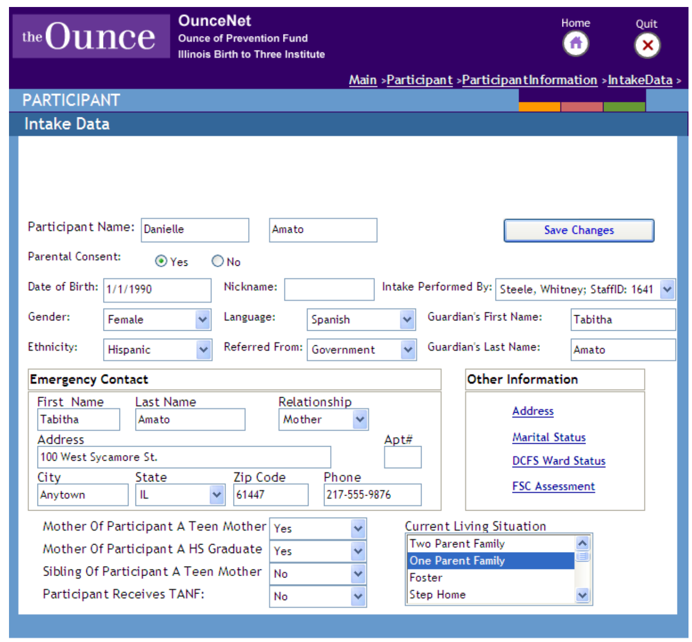
- To change any information, simply enter it over the old information and click Save Changes.

- Under Other Information are links to fields that are more likely to be updated: Address, Marital Status, DCFS Ward Status, and FSC Assessment.

- To update the address, marital status or DCFS status of a participant, simply click the corresponding link, click Add New Record, enter the new data, and click Update or Save to save your changes.

- To add or update an FSC Assessment, click the link, enter the data into the fields that appear, and click Save Changes. Simply type the new data over the old to update or correct a prior assessment.




## Quick Steps

1. Click Intake Data on the *Participant Information* screen, enter the information, and click Save Changes.

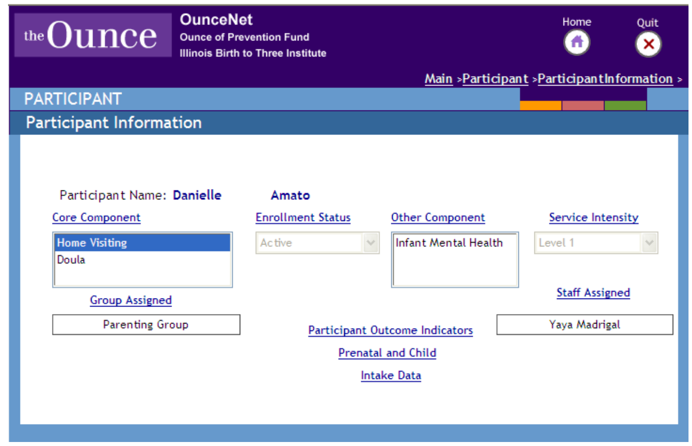
2. To update Address, Marital Status or DCFS Ward Status, click the link, click Add New Record, enter the new information, and click Update or Save.

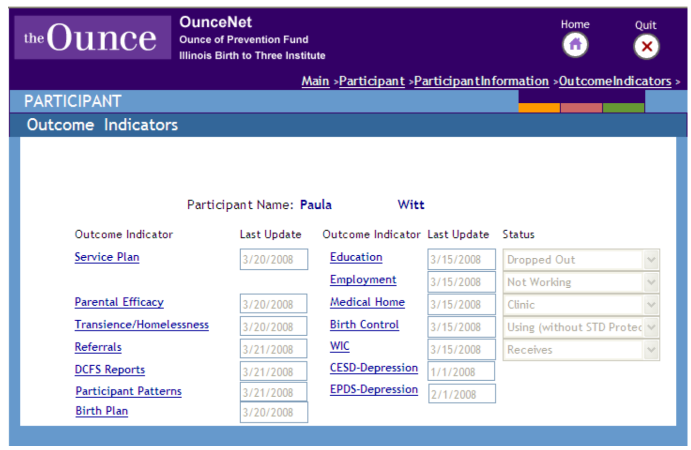
3. To update an FSC Assessment, click the link, enter the data, and click Save Changes.

## Participant Outcome Indicators

The *Outcome Indicators* screen serves as the hub for all participant outcome information.

- Click on the Participant Outcome Indicators link on the *Participant Information* screen.
- The *Outcome Indicators* screen contains links to the participant's Service Plan, Parental Efficacy, Transience/Homelessness, Referrals, DCFS Reports, Participant Patterns, Education, Employment, Medical Home, Birth Control, WIC, and Depression scale outcome data. The screen also tells you when indicators were last updated, and for some, the last status.
- To view or enter more information for any of these Outcome Indicators, click the link for the data screen you wish to see.




## Quick Steps

1. In the *Home* screen, click Participants.
2. Select the correct participant.
3. Click Details.
4. Click the Participant Outcome Indicators link.
5. To enter data for outcome indicators, click on the appropriate link.
6. For details on how to fill out each section, refer to the following pages.

***Home>Participant>ParticipantInformation>OutcomeIndicators***

## Service Plan and Birth Plan

- From the *Outcome Indicators* screen, click the Service Plan or Birth Plan link.

## To Add a New Service Plan or Birth Plan Record

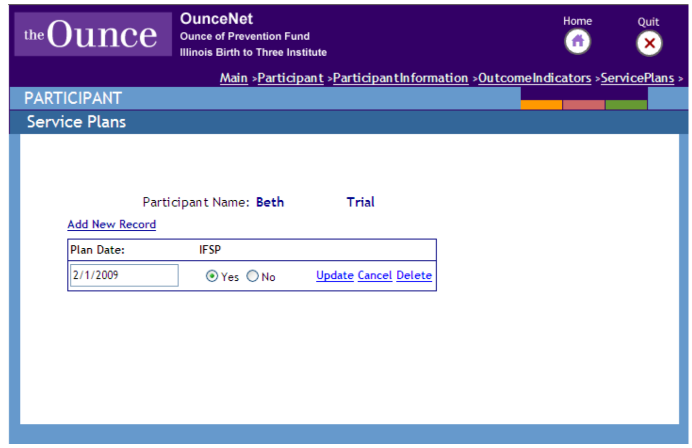
- Click Add New Record.
- Enter the date the service or birth plan went into effect in the Plan Date field.
- Click the Yes or No box to indicate if there is an IFSP (Service Plan) or Birth Plan.
- Click Update to save your new record.

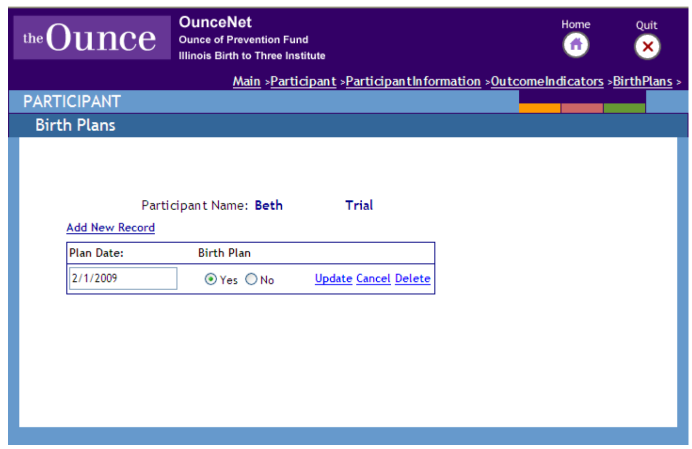
This information must be entered at intake and every 6 months thereafter.

**Note:** with outcome indicators or other records, you may occasionally need to edit or delete a prior record that was entered erroneously. To do this:

- Click Edit next to the record to be modified.
- Make any necessary modifications to previous data and click Update to save your changes.
- To remove the record from the OunceNet system entirely, click Delete.

In general, you won't need to use the Edit or Delete functions unless you are correcting a mistake. **When updating old records with new information, always use Add New Record; do not Edit the prior record.**




## Quick Steps

1. In the *Outcome Indicators* screen, click the Service Plan or Birth Plan link.
2. Click Add New Record.
3. Enter the Plan Date.
4. Click whether or not there is an IFSP or Birth Plan.
5. Click Update.

***Home>Participant>ParticipantInformation> OutcomeIndicators>ServicePlans***

## Parental Efficacy (Mother/Baby) Scale

- From the *Outcome Indicators* screen, click the Parental Efficacy link. This takes you to the *Parental Efficacy* screen.

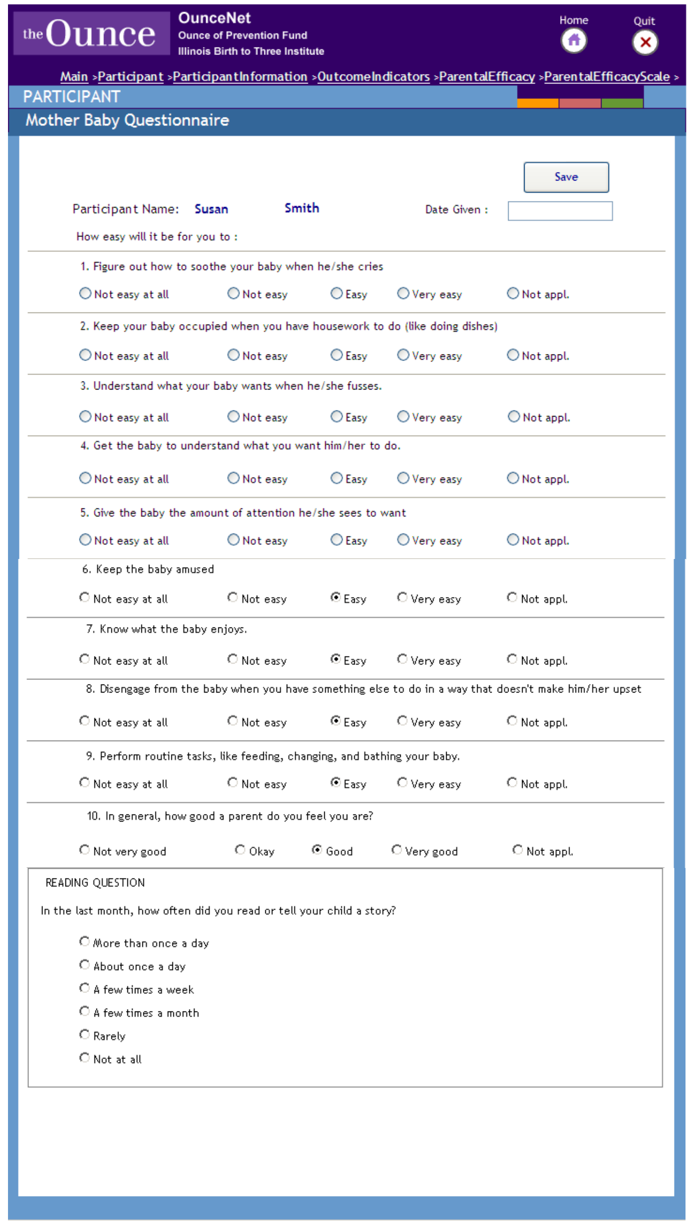
## To Add a New Parental Efficacy Record

- Click Add New Record. This takes you to the *Parental Efficacy Scale* screen.
- Enter the Date Scale Given.
- The screen has 11 questionnaire items. The last question, added for research purposes, asks how frequently the participant reads or tells a story to the child.
- Click the participant's response to each of the 11 items.
- When the scale is complete, scroll to the top of the page and **click the Save button to save your work.**

## To Modify or Delete an Existing Parental Efficacy Record

- If you need to modify a scale entered previously, click the Details button next to the scale to be modified.
- Make the necessary changes and click Save.
- To delete a record, click the Delete button next to the scale to be deleted. This removes the record from the OunceNet system entirely.

This information must be entered at intake and every 6 months thereafter.




## Quick Steps

1. From the *Outcome Indicators* screen, click Parental Efficacy.
2. Click Add New Record; enter data.
3. Click Save.

***Home>Participant>ParticipantInformation>OutcomeIndicators>ParentalEfficacy>ParentalEfficacyScale***

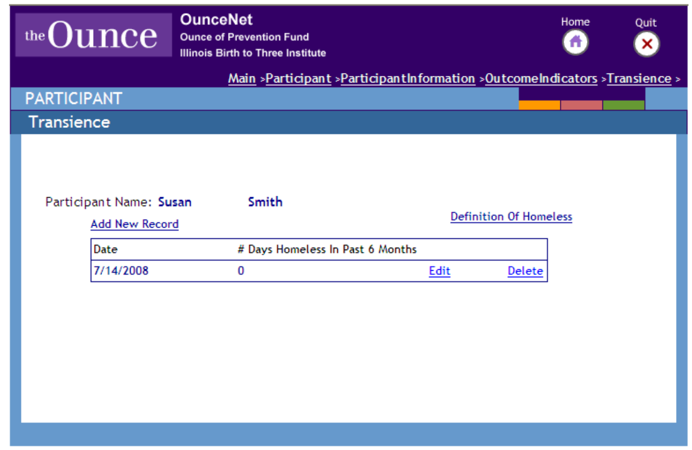
## Transience/Homelessness

- From the *Outcome Indicators* screen, click the Transience/Homelessness link.
- This link takes you to the *Transience* screen.
- Participants qualify as homeless if they have been staying somewhere temporary, unstable or inadequate. To help determine if the participant is homeless, click the Definition of Homeless link in the *Transience* screen to see the official definition of Homeless.

## To Add a New Record

- Click the Add New Record link, which will provide you with two new fields for Date and # Days Homeless in Past 6 Months.
- Enter the Date and appropriate number of days.
- Click Update to save your new record.
- To edit or delete an existing record, please refer to the instructions listed under the Service Plan outcome indicator.

This information must be entered at intake and every 6 months thereafter.




## Quick Steps

1. From the *Outcome Indicators* screen, click the Transience/Homelessness link.
2. Click Add New Record.
3. Enter the Date and # Days Homeless In Past 6 Months.
4. Click Update.

***Home>Participant>ParticipantInformation>OutcomeIndicators>Transience***

## Referrals

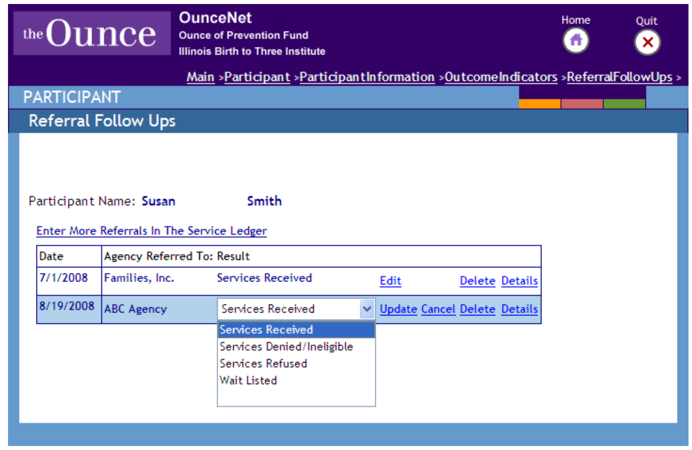
- From the *Outcome Indicators* screen, click the Referrals link.
- This brings you to the *Referral Follow-Ups* screen, which lists all referrals given to the participant so far.
- This screen can also be accessed from the *Referral* screen (the screen used to enter new referrals) by clicking Show All Referrals.

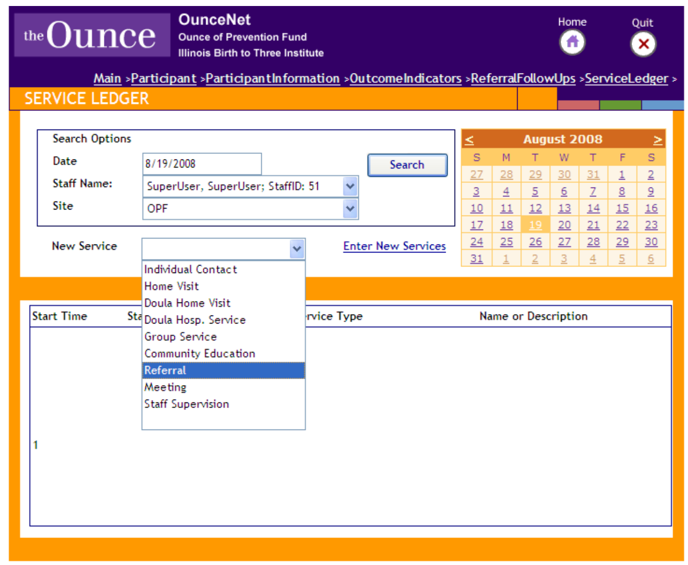
## To Update the Result of a Prior Referral

- Click Edit next to the referral you would like to update on this screen. After you select a new result, click Update to save your changes.
- To change anything other than the result, click Details next to the referral. You may then edit any information about the referral. Click Submit to save your changes.

## To Add a New Referral

- Click the Enter More Referrals in the Service Ledger link. This will take you to the *Service Ledger* screen.
- On the *Service Ledger* screen, select Referral as the type of New Service you would like to enter and then click Enter New Services. This will take you to the *Referral* screen.
- Enter the referral data and click Submit. (For more detail on this process, refer to the Services section of this manual.)




## Quick Steps

1. Click Referrals on the *Outcome Indicators* screen.
2. To update the result of the referral, click Edit next to the referral you would like to modify. Select result and click Update.
3. To add a new referral, click Enter More Referrals in the Service Ledger.
4. In the New Service field select Referral and click Enter New Services.
5. Enter referral data and click Submit.

***Home>Participant>ParticipantInformation>OutcomeIndicators>ReferralFollowUps***

## DCFS Reports

- From the *Outcome Indicators* screen, click the DCFS Reports link.
- This brings you to the *DCFS Activity* screen.

## To Add a New DCFS Report Record

- Click Add New Record.
- Enter the Date of DCFS Report. You may estimate the date if you do not have the exact date.
- Select a response to: Who is the Victim of Suspected Abuse? Options include Participant or Child.
- Select a response to: Who Made the DCFS Hotline Report?
- Select a response to: What was the Outcome of the Report? Options are Unfounded/Not Indicated, Founded/Indicated, or Unknown.
- Click Update to save your record.
- Note that information regarding the outcome or who made the report is not needed in order to record the report; you may select Unknown for this information. It is important to enter all DCFS reports, whether or not this information is known.
- To edit or delete a prior report record, please refer to the instructions listed in the Service Plan section of this manual.

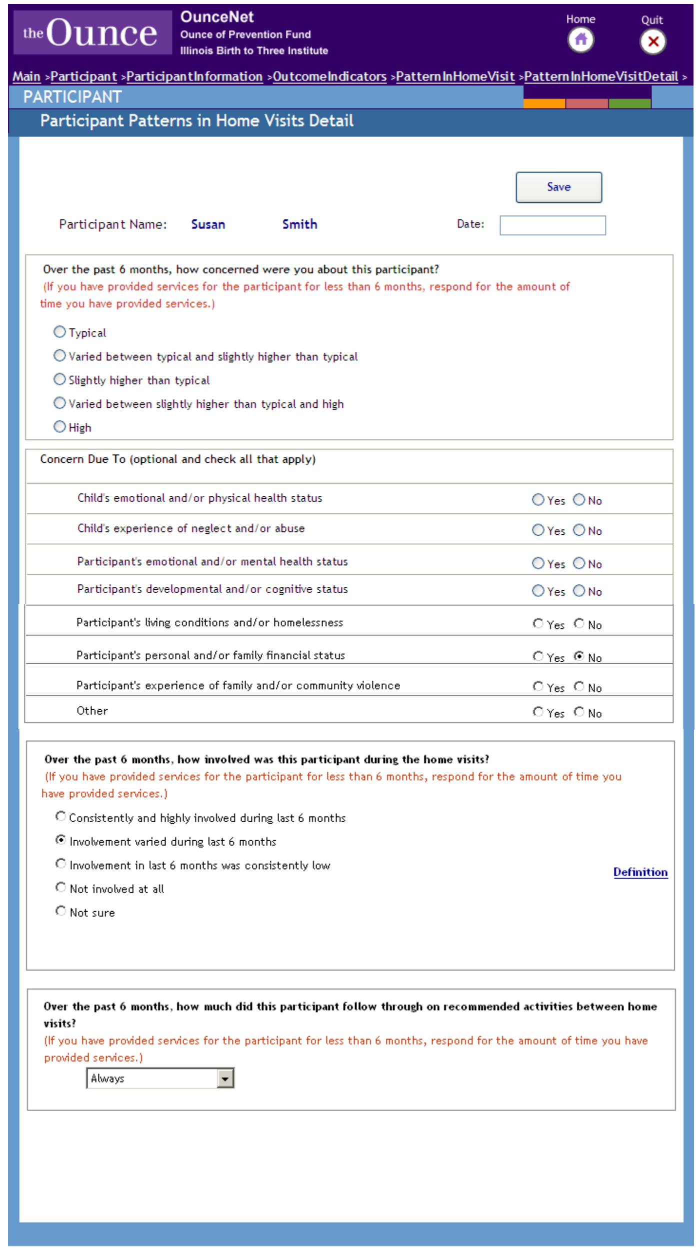

## Quick Steps

1. Click the DCFS Reports link on the *Outcome Indicators* screen.
2. Click Add New Record.
3. Enter the Date of DCFS Report.
4. Select the suspected victim, who made the report, and the outcome.
5. Click Update.

***Home>Participant>ParticipantInformation>
OutcomeIndicators>DCFSActivity***

## Participant Patterns

- From the *Outcome Indicators* screen, click the Participant Patterns link; then click Add New Record. This takes you to the *Participant Patterns in Home Visits Detail* screen.
- Enter the Date.
- Select your level of concern for the participant. Answers range from Typical to High. This is a rare opportunity in OunceNet to record subjective feelings about the participant.
- Click the reasons for your concern. This field is optional, but gives you the chance to indicate a specific cause for concern, such as homelessness or violence.
- Select a level of involvement for the participant. This is meant to capture whether or not participants were actively engaged in Home Visits. You may click the Definition link for further clarification of each level of involvement.
- Select how often the participant followed through on recommended activities. Examples of recommended activities may include attending group services, utilizing referrals or reading materials left with them.
- Scroll back up to the top and click Save to save your record.
- This information must be entered at intake and every 6 months thereafter.




## Quick Steps

1. Click the Participant Patterns link on the *Outcome Indicators* screen.
2. Click Add New Record.
3. Enter data and click Save.

***Home>Participant>ParticipantInformation>OutcomeIndicators>PatternInHomeVisit>PatternInHomeVistDetail***

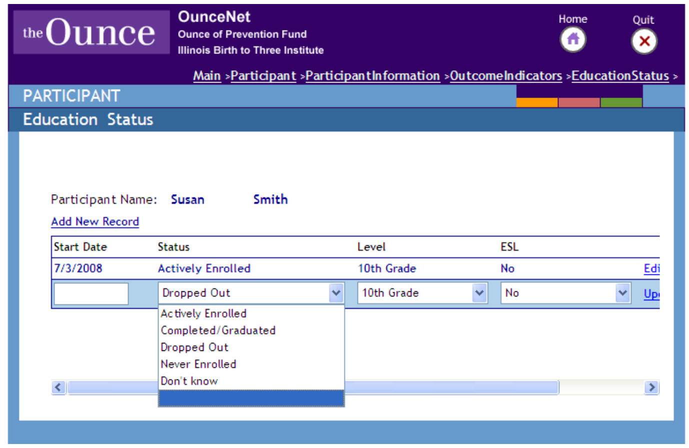
## Education

- From the *Outcome Indicators* screen, click the Education link.
- This link takes the user to the *Education Status* screen.

## To Add a New Education Status Record

- Click Add New Record.
- Enter the Start Date for the new education status. This is the date that you received the information from the participant, not the date that the status began.
- For the Status and Level fields, select options to describe the participant's current school involvement.
- There are two choices for GED class levels. One choice indicates GED classes where the participant's reading level is less than 12th Grade. The other choice indicates a reading level at or above 12th Grade. (When participants complete their GED, they are automatically assigned a 12th-Grade reading level by the system due to DHS reporting requirements.)
- Select Yes for ESL if the participant is taking English as a Second Language classes; otherwise select No.
- Click Update to save your record.
- To edit or delete a prior record, please refer to the instructions in the Service Plan section.

This information must be entered at intake and every 6 months thereafter.




## Quick Steps

1. From the *Outcome Indicators* screen, click the Education link.
2. Click Add New Record.
3. Enter the status Start Date.
4. Select the education Status.
5. Select the education Level.
6. Select the ESL status.
7. Click Update.

***Home>Participant>ParticipantInformation> OutcomeIndicators>EducationStatus***

## Employment

- From the *Outcome Indicators* screen, click the Employment link.

- The link takes you to the *Employment Status* screen.

## To Add a New Employment Record

- Click Add New Record.

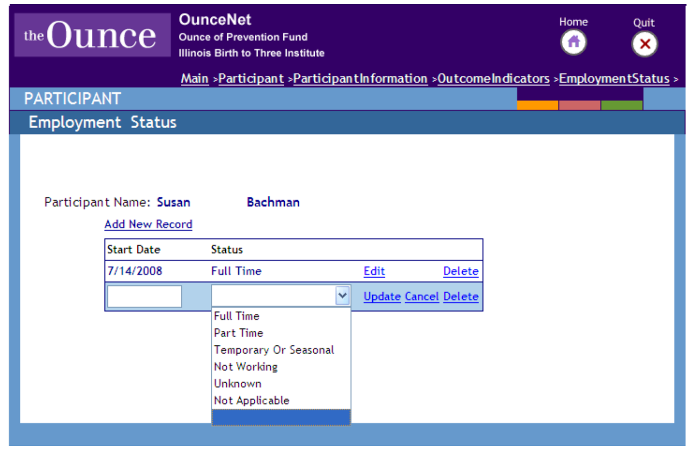
- Enter the employment Start Date. This is the date that you received the information from the participant, not the date that the status began.

- Select the employment Status from the following dropdown options: Full Time, Part Time, Temporary or Seasonal, Not Working, Unknown, or Not Applicable.

- Click Update to save the new record.

- To edit or delete a prior record, please refer to the instructions in the Service Plan section.

This information is due at intake and every 6 months thereafter.




## Quick Steps

1. From the *Outcome Indicators* screen, click the Employment link.

2. Click Add New Record.

3. Enter the Start Date.

4. Select the employment Status.

5. Click Update.

***Home>Participant>ParticipantInformation>OutcomeIndicators>EmploymentStatus***

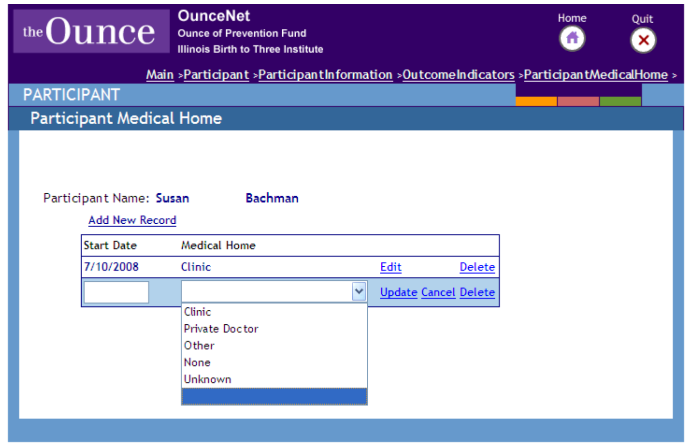
## Medical Home

- From the *Outcome Indicators* screen, click the Medical Home link.
- This link takes the user to the *Participant Medical Home* screen

## To Add a New Medical Home Record

- Click Add New Record.
- Enter the new medical home Start Date. This is the date that you gathered the information from the participant, not the date that the status began.
- Select the Medical Home from the dropdown box. Options are Clinic, Private Doctor, None, Unknown, and Other.
- Click Update to save your new record.
- To edit or delete a prior record, please refer to the instructions in the Service Plan section.

This information must be entered at intake and every 6 months thereafter.




## Quick Steps

1. From the *Outcome Indicators* screen, click the Medical Home link.
2. Click Add New Record.
3. Enter the Start Date.
4. Select the current Medical Home.
5. Click Update.

***Home>Participant>ParticipantInformation>OutcomeIndicators>ParticipantMedicalHome***

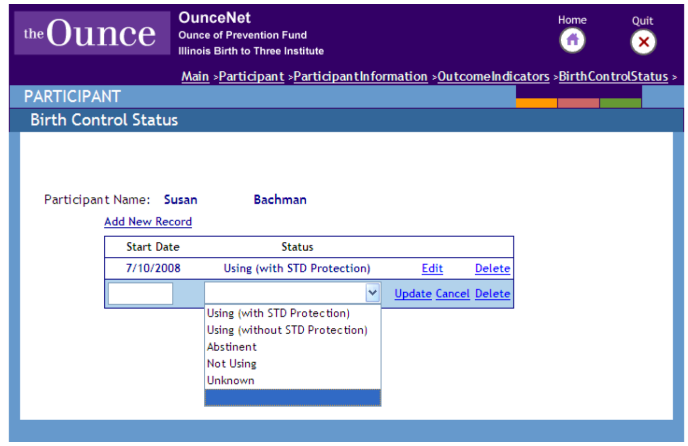
## Birth Control

- From the *Outcome Indicators* screen, click the Birth Control link.
- This link takes the user to the *Birth Control Status* screen.

## To Add a New Birth Control Record

- Click Add New Record.
- Enter the new birth control status Start Date. This is the date that you gathered the information from the participant, not the date that the status began.
- Select the new birth control Status from the dropdown box.
- Using (with STD protection) should be selected if the participant is using a form of birth control that also protects her from sexually transmitted diseases (i.e. latex condoms). Using (without STD protection) should be selected if the participant is using a form of birth control that does not protect against sexually transmitted diseases (e.g. birth control pills). The other options are Abstinent, Not Using, and Unknown.
- Click Update to save the new record.
- To edit or delete a prior record, please refer to the instructions in the Service Plan section.

This information must be entered at intake and every 6 months thereafter.




## Quick Steps

1. Click Birth Control on the *Outcome Indicators* screen.
2. Click Add New Record.
3. Enter the Start Date.
4. Select Status.
5. Click Update.

***Home>Participant>ParticipantInformation>OutcomeIndicators>BirthControlStatus***

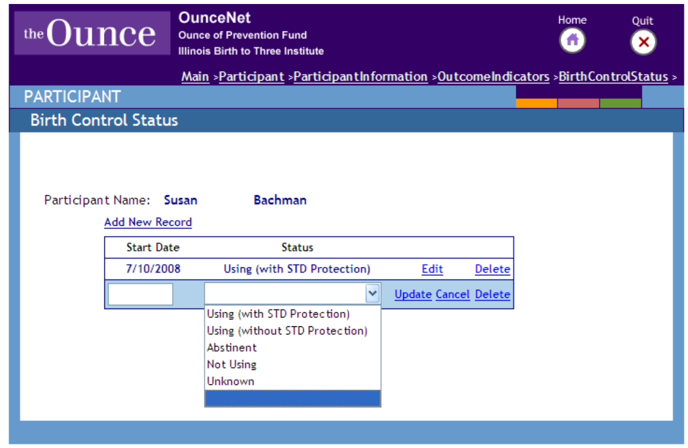
## WIC

- From the *Outcome Indicators* screen, click the WIC link.
- This link takes the user to the *WIC Status* screen.

## To Add a New WIC Record

- Click Add New Record.
- Enter the new WIC status Start Date. This is the date that you gathered the information, not the date that the status began.
- Select the new WIC Status that best describes the participant's situation in regards to WIC services. Options are Receives, Referred (not receiving yet), Refused or Not Needed. If no options are an exact match, simply choose the closest one.
- Click Update to save the record.
- To edit or delete a prior record, please refer to the instructions in the Service Plan section.

This information must be entered at intake and every 6 months thereafter.




## Quick Steps

1. From the *Outcome Indicators* screen, click the WIC link.
2. Click Add New Record.
3. Enter the new WIC status Date.
4. Select the new WIC Status.
5. Click Update.

***Home>Participant>ParticipantInformation> OutcomeIndicators>WICStatus***

## Center for Epidemiologic Studies Depression Scale

- From the *Outcome Indicators* screen, click the CESD Depression link, then click Add New Record.

- This brings you to the *Center for Epidemiologic Studies Scale – Depression Detail* screen.

## To Add a New CESD Scale

- Enter the Date Given for the scale, and indicate whether the scale was completed In person or By phone.

- Enter the scores based on the participant's answers for each item, including the items in Part B.

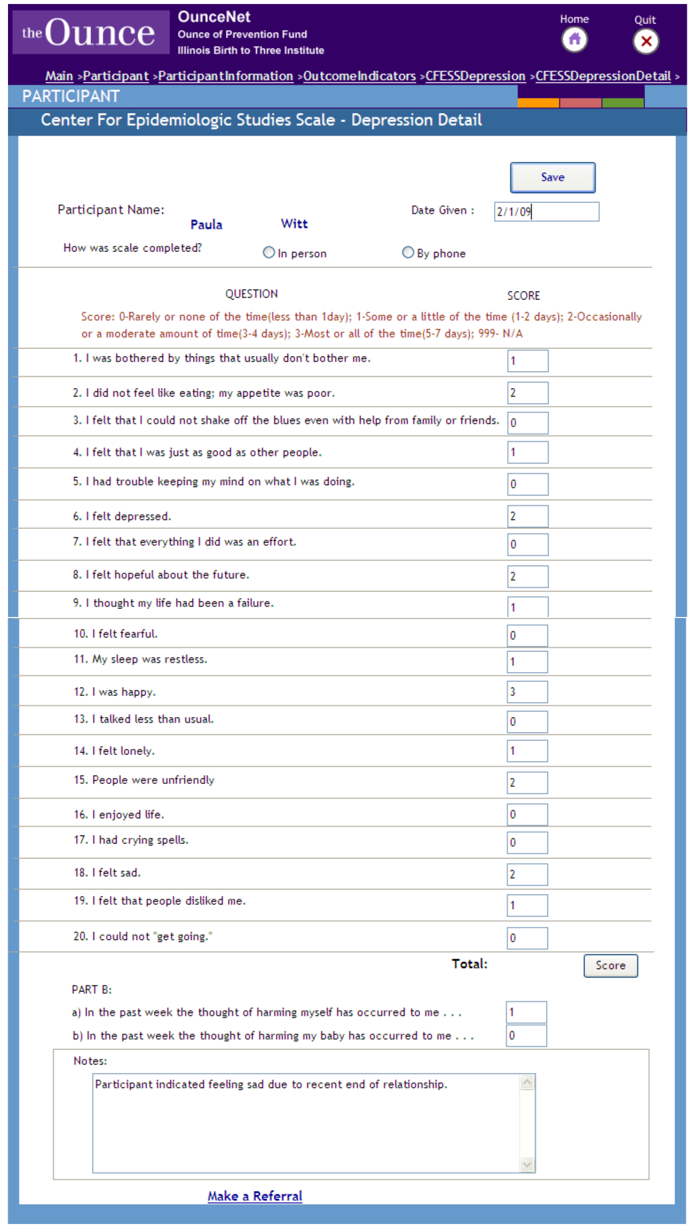
- Click Score at the bottom to see the Total score for the participant.

- You may enter notes in the space provided if you wish.

- Click Save to save the scale.  Use the navigation bar to return to prior screens.

- If needed, use the Make a Referral link at the bottom of the screen to make a mental health referral for the participant.  Do not use this link until you first click Save to save your record.

This information must be entered at intake and every 6 months thereafter.




## Quick Steps

6. From the *Outcome Indicators* screen, click the CESD Depression link, then click Add New Record.

7. Fill in all fields.  Click Score to see the participant's total score.

8. Click Save to save the scale.

***Home>Participant>ParticipantInformation>
OutcomeIndicators>CFESSDepression>CFESSDepressionDetail***

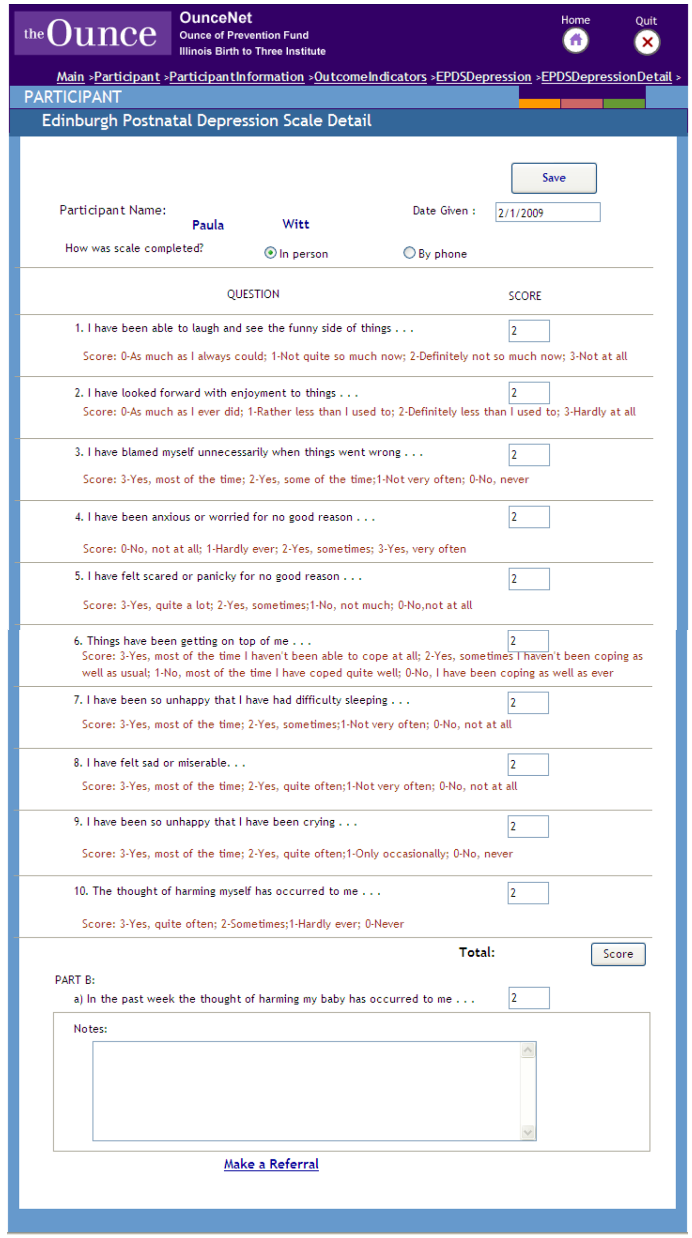
## Edinburgh Postnatal Depression Scale

- From the *Outcome Indicators* screen, click the EPDS Depression link, then click Add New Record.
- This brings you to the *Edinburgh Postnatal Depression Scale Detail* screen.

## To Add a New EPDS Scale

- Enter the Date Given for the scale, and indicate whether the scale was completed In person or By phone.
- Enter the scores based on the participant's answers for each item, including the item in Part B.
- Click Score at the bottom and OunceNet will tally the participant's Total score for the scale.
- You may enter notes in the space provided if you wish.
- Click Save to save the scale. Use the navigation bar to return to prior screens.
- If needed, use the Make a Referral link at the bottom of the screen to make a mental health referral for the participant. Do not use this link until you first click Save to save your record.

This information must be entered at intake and every 6 months thereafter.




## Quick Steps

1. From the *Outcome Indicators* screen, click the EPDS Depression link, then click Add New Record.
2. Fill in all fields. Click Score to see the participant's total score.
3. Click Save to save the scale.

***Home>Participant>ParticipantInformation>***
***OutcomeIndicators>EPDSDepression>EPDSDepressionDetail***

# *Prenatal and Child*

# Introduction to Prenatal and Child

All pregnancies and children that a participant has had must be entered in OunceNet. Prenatal and Child records are kept together in the system. Therefore, a Prenatal and Child record may represent just a pregnancy, a pregnancy that became a child, or a child for which the pregnancy data is unknown. Usually a record will begin in OunceNet as a pregnancy, then as a child after the birth takes place. Any child records first entered in OunceNet after birth rather than before do not require information pertaining to the pregnancy and birth.

Regardless of age or circumstance, every pregnancy and child should be entered. If a pregnancy did not result in birth, the Pregnancy Outcome field can be used to indicate this. If a child was born but for whatever reason should not be counted towards Program Outcomes, the child should still be entered into OunceNet.

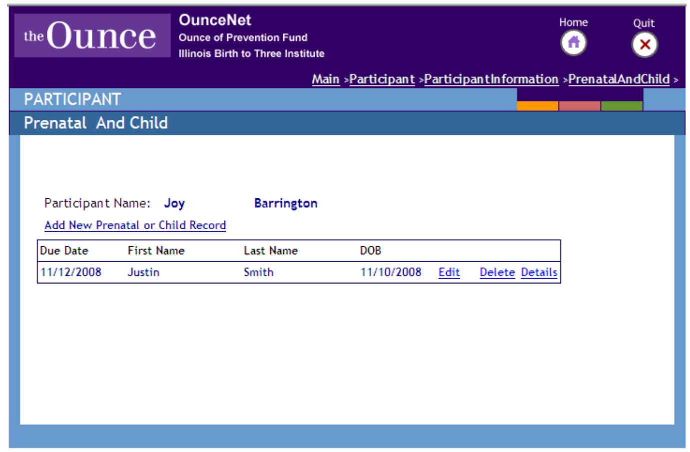
All Prenatal and Child records are initially entered on the *Prenatal and Child* screen. Entering a due date alone indicates that the record represents a pregnancy. If the pregnancy has not concluded, then no further data entry is needed. However, if the child was born or if the pregnancy ended for any other reason, then the user must proceed to the *Child Intake* screen.

The *Child Intake* screen is accessed from the *Child Data* screen. On the *Child Data* screen the user will also see links to all the other child data areas, such as immunizations and developmental screenings. The *Child Intake* screen must be completed **first**, before any of the other child data areas are entered. The *Child Intake* screen is very important because it determines how that child record will be counted towards the Program Outcomes. OunceNet will only count live births that have not been removed from the statistics. The *Child Intake* screen also contains all of the Birth Outcome Indicators such as birth weight and delivery type. Finally, it provides access to the *Doula Data* screen, which should be completed if the participant is receiving Doula services.

Once the *Child Intake* screen is complete, the user can proceed to all of the other child areas of the system. The *Child Data* screen provides access to those areas, and helps the user keep abreast of the child's status on immunizations, developmental screenings, and other Outcome Indicators.

## Child Intake

- A child/prenatal intake must be completed for every pregnancy and child of each Active participant.
- Any children not intended to count toward program statistics (e.g. children not living with the participant) can be designated as such on the *Child Intake* screen, but should still be entered into OunceNet.
- To enter a new child or pregnancy, you must first access the *Participant Information* screen. On this screen, click the Prenatal and Child link.
- On the *Prenatal and Child* screen, click the option to Add New Prenatal or Child Record.
- You may enter either enter a new pregnancy or a new child. If you are entering a new pregnancy, fill in only the Due Date, then click Update. Come back when the child is born and click Edit to fill in the Name and DOB (Date of Birth).
- For a new child, fill in the Name and DOB, as well as the Due Date if you know it, and click Update.
- The child intake is still NOT COMPLETE at this point. To complete a child intake, click Details. This link takes you to the *Child Data* screen. The *Child Data* screen serves as a hub for the child's information, with links to all of the child's screens.
- Click the Child Intake link at the top of the screen to access the *Child Intake* screen. This is where you will complete the birth information.





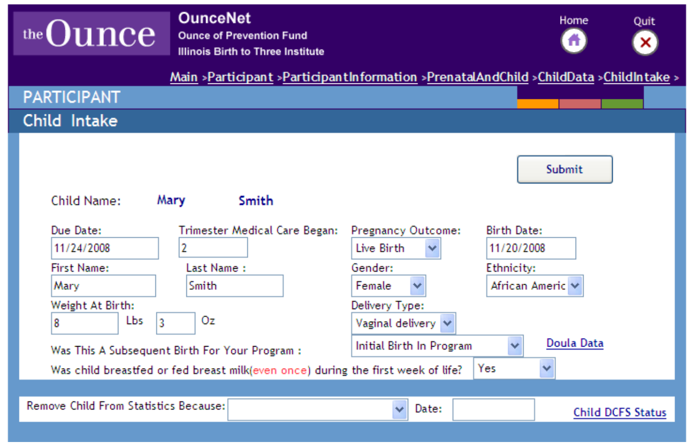
## Quick Steps

1. Click the Prenatal and Child link on the *Participant Information* screen.
2. Click Add New Prenatal or Child Record.
3. Enter Due Date, Name and DOB and click Update.
4. Click Details to go to the *Child Data* screen.
5. Click the Child Intake link to complete the child intake.

***Home>Participant>ParticipantInformation> PrenatalandChild>ChildData***

## Completing a Child Intake

- To complete a child intake, click the Child Intake link on the *Child Data* screen.
- On the *Child Intake* screen, enter the Due Date, First Name, Last Name, and Birth Date if they do not already appear. Enter 1, 2 or 3 for the Trimester Medical Care Began.
- Select the Pregnancy Outcome. If the pregnancy outcome was a live birth, select the baby's Gender, Ethnicity, Weight at Birth in pounds and ounces, and Delivery Type.
- Select Initial Birth in Program if this is the participant's first child while participating in your program. Select Subsequent Birth in Program if this is not the participant's first child while in your program. Select Birth Prior to Program if you are entering the older child of a new participant.
- Enter Breastfeeding information for the child. You may enter Unknown and return later to update the information if you do not yet know the breastfeeding status.
- If appropriate, click the Doula Data to enter Doula information.
- If the child should not be tracked by your program, fill in the fields at the bottom of the page; otherwise, leave them blank (see following pages).
- Click Submit to save your changes.



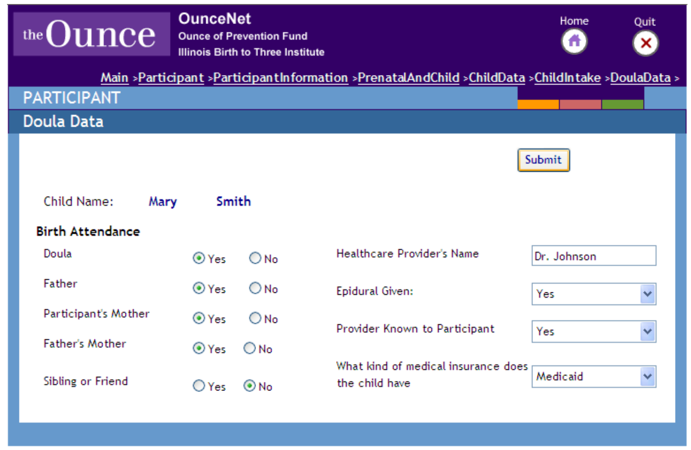

## Quick Steps

1. Click Child Intake on the *Child Data* screen.
2. Enter Due Date, Trimester Medical Care Began, First Name, Last Name, Weight at Birth, and Birth Date.
3. Select current Pregnancy Outcome, Gender, Ethnicity, and Delivery Type.
4. Select option for Subsequent Birth For Your Program.
5. Enter Breastfeeding status.
6. Enter Doula information if the participant is a Doula participant (see following pages).
7. Leave the bottom fields blank unless you need to remove the child from OunceNet (see following pages).
8. Click Submit.

***Home>Participant>ParticipantInformation> PrenatalandChild>ChildData>ChildIntake***

## Doula Data

- If your site has a Doula program, the *Doula Data* screen can be accessed from the *Child Intake* screen.
- Click the Doula Data link to access the *Doula Data* screen.
- The Birth Attendance questions ask if each of five types of people were present at the birth. Each must be answered either Yes or No.
- In the Healthcare Provider's Name field, enter the name of the Doctor or other Healthcare person present at the birth.
- Select Yes, No, Unknown or Not Applicable for Epidural Given.
- Select Yes, No, Unknown or Not Applicable for Provider Known to Participant.
- Select the type of medical insurance the child has. Options are Medicaid, Kidcare, Other Insurance, or No Insurance.
- Click Submit to save the data you have entered.
- To change any information saved previously, simply enter the new data and click Submit.




## Quick Steps

1. Click the Doula Data link on the *Child Intake* screen.
2. Click either Yes or No for all Birth Attendance fields.
3. Enter the Healthcare Provider's Name.
4. Select whether Epidural Given.
5. Select whether the provider is known to the participant.
6. Select the type of medical insurance.
7. Click Submit.

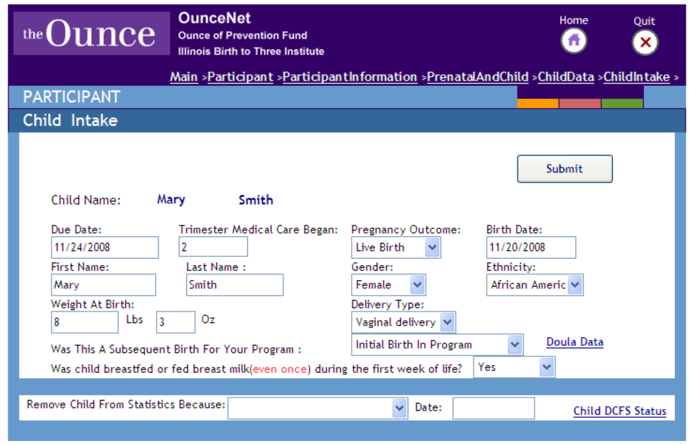
***Home>Participant>ParticipantInformation> PrenatalandChild>ChildData>ChildIntake>DoulaData***

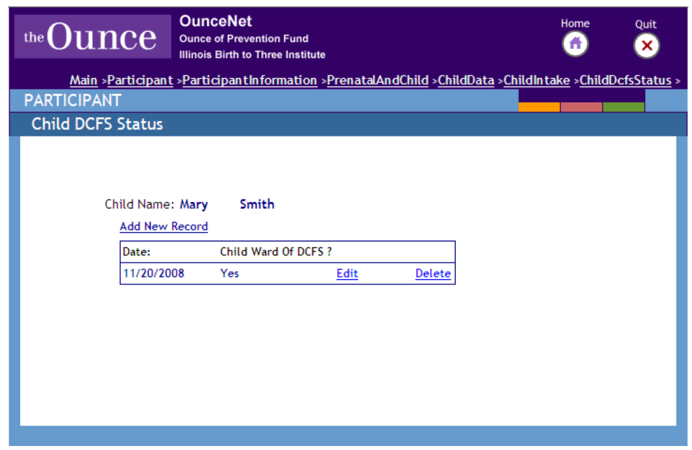
## Removing a Child from Outcome Statistics

- The bottom half of the *Child Intake* screen allows you to remove a child's name from consideration in your program's outcomes.
- To do this, select the reason for by choosing an option in the Remove Child From Statistics Because field.
- Enter the Date of the removal status. If a child was never in the program, this date should be the same as their date of birth.
- Click Submit to save this change. All fields at the top of the page must also be complete for this to save your data.
- If you are unclear about which situations qualify for removal from program statistics, consult your Program Advisor.

## To Change the Child's DCFS Status

- Next to the date, there is a link for Child DCFS Status.
- Click Add New Record, then enter the Date and select a dropdown option for Child Ward of DCFS? Options are Yes, No, Unknown or Not Applicable. Click Update to save the new record.
- When the screen is complete, click Child Intake on the Navigation Bar to return to the *Child Intake* screen.




## Quick Steps

To remove a child from your program's outcome statistics:

1. Enter the Date of removal and select an option in the Remove Child From Statistics Because field.
2. Click Submit to save your data.

To change the child's DCFS status:

1. Click the Child DCFS Status link.
2. Click Add New Record, enter the Date and select Child Ward of DCFS? option.
3. Click Update to save your new record.

***Home>Participant>ParticipantInformation>PrenatalandChild>ChildData>ChildIntake>ChildDCFSStatus***

## Editing or Deleting a Prior Record

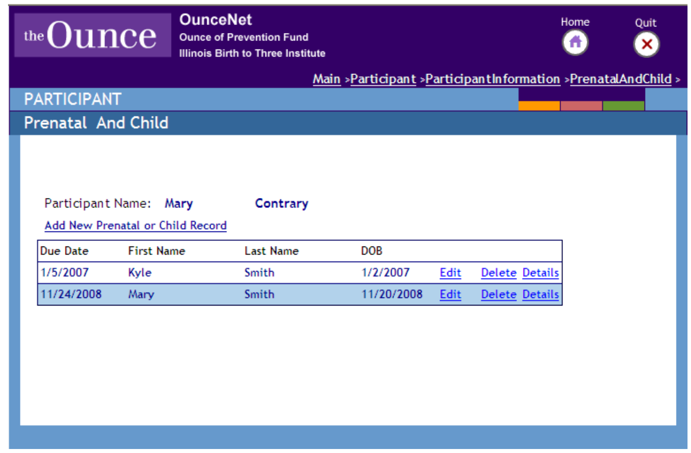
Many screens in the Prenatal and Child section, including the *Prenatal and Child* screen, give you the option to Edit or Delete a prior record.

To update a participant's information you usually **add a new record** rather than changing a prior entry. Generally you only use Edit if you want to change information that was entered erroneously, or if certain fields of a prior record were left blank (such as the Date Of Birth for a pregnant participant's unborn child) and you would like to now complete them.

## To Edit a Prior Record

- Click Edit next to the record you would like to modify.
- This will give you access to each field's dropdown and text boxes.
- Select the new option for each field that you would like to change. To change any information previously entered in a text box, simply type over the old data.
- Click Update to save the data you just entered.

You also have the option to delete any record entirely. Click Delete next to the record you would like to remove if you wish to permanently remove it from the OunceNet system. Using Delete removes all history of the record from OunceNet, so you generally only use this option if the record was originally entered in error.




## Quick Steps

1. Click Edit next to the record you wish to modify.
2. Enter revisions.
3. Click Update to save your new data.
4. Click Delete only to remove all history of a record from OunceNet.

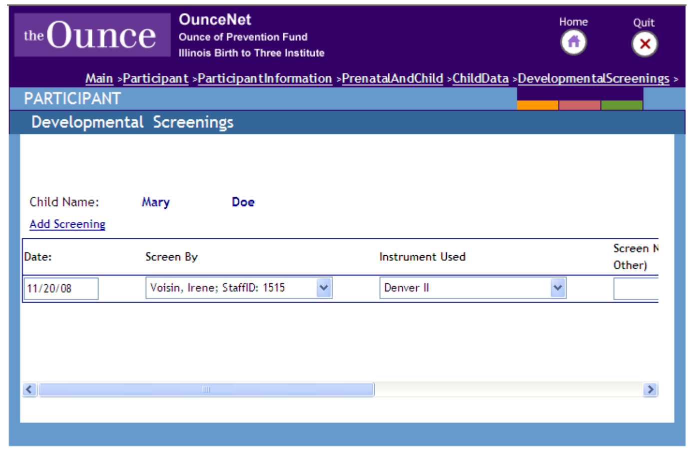
***Home>Participant>ParticipantInformation> PrenatalandChild>ChildData>Prenatal and Child***

## Developmental Screenings

- In the *Child Data* screen, click on the Developmental Screenings link. This will bring you to the *Developmental Screenings* screen. This screen lists all of the developmental screenings performed on the child so far.

## To Add a New Screening

- Click the Add Screening link.
- Enter the Date of the screening.
- Select the name of the staff person who performed the screening.
- Select the Instrument Used. Options are Denver II, Brigance, Batelle Developmental Inventory Screening, Ages and Stages, Ages and Stages Social Emotional, and Other Social Emotional.
- If the instrument used does not appear on the dropdown list of instruments, you may enter it under Screen Name (If Other); otherwise, leave this field blank.
- Select Yes or No to indicate if this screen was a Rescreen.
- Select the Referral Decision. Options are No Referral, Rescreen, Referral, and Already Enrolled in EI.
- Click Update to save your data.
- To edit a prior record, please refer to the instructions on the previous page.




## Quick Steps

1. Click Developmental Screenings in the *Child Data* screen.
2. Click Add Screening.
3. Enter Date.
4. Select the staff name.
5. Select the Instrument Used or enter the Screen Name (If Other).
6. Select Yes or No to Rescreen.
7. Select the Referral Decision.
8. Click Update.

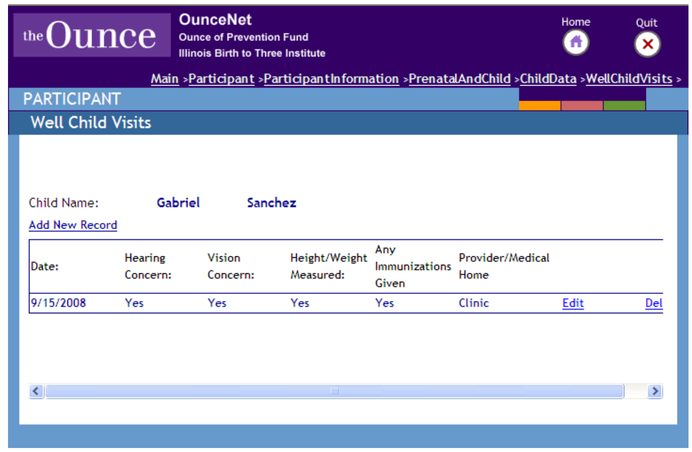
***Home>Participant>ParticipantInformation>PrenatalandChild>ChildData>DevelopmentalScreenings***

## Well Child Visits

- In the *Child Data* screen, click the Well Child Visits link.
- This brings you to the *Well Child Visits* screen. You may enter the data for this screen upon a verbal report from the participant that the visit occurred.

## To Add a New Well Child Visit

- Click Add New Record.
- Enter the Date of the Well Child Visit.
- Indicate whether the participant expressed a Hearing Concern or Vision Concern at the visit. You may enter Unknown if you do not have this information.
- Select Yes, No, Unknown or Not Applicable for whether the child had his or her Height/Weight Measured.
- Select Yes, No, Unknown or Not Applicable for Any Immunizations Given. (Entering specific immunization records is done on the *Immunization Records* screen, which is accessed by clicking Immunizations on the *Child Data* screen.)
- Select the participant's healthcare Provider/Medical Home. Options are Clinic, Private Doctor, Other, None or Unknown.
- Click Update to save the data you just entered.
- To edit a prior record, please refer to the instructions in the previous pages of this section.




## Quick Steps

1. On the *Child Data* screen click Well Child Visits.
2. Click Add New Record.
3. Enter the Date of the Well Child Visit.
4. Select whether the participant expressed a Hearing Concern.
5. Select whether the participant expressed a Vision Concern.
6. Select an option for Height/Weight Measured.
7. Indicate if Any Immunizations were given.
8. Select the participant's healthcare Provider/Medical Home.
9. Click Update.

***Home>Participant>ParticipantInformation>PrenatalandChild>ChildData>WellChildVisits***

## Immunization Records

- In the *Child Data* screen, click the Immunizations link. The *Immunization Records* screen lists a child's immunizations records according to the current status of those records.

- When you arrive at the screen you always first see the immunizations that are currently Needed. If the child does not have any Needed immunizations on that day, you will not see any records.

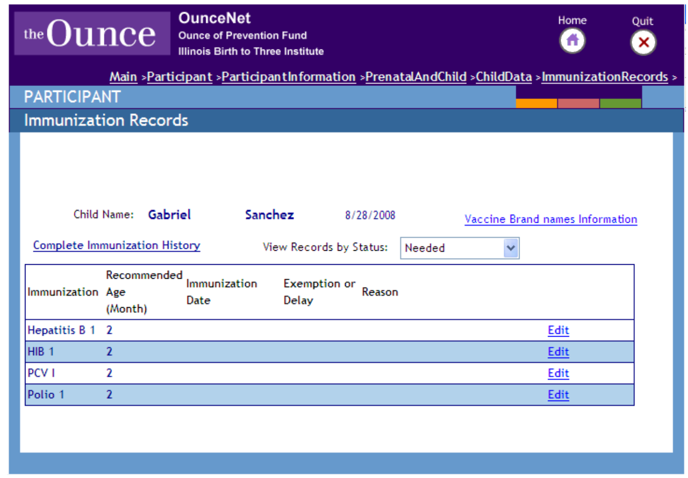
- Use the View Records By Status dropdown list to control which status you are viewing. You may click Not Needed Yet to view immunizations the child will need in the future.

## To Add an Immunization

- To enter an immunization, click Edit, then enter the exact date on which the child received the shot. Select N/A for both Exemption or Delay and Reason, then click Update.

- If an immunization is late for medical or religious reasons, because the clinic does not have the vaccine, or because the clinic uses a different schedule from OunceNet, enter the immunization as an Exemption or Delay and select the Reason, **leaving the date of the shot blank until it occurs**. (You may click Edit to add the date later, if and when a delayed immunization occurs.) **Use Exemption or Delay only if one of the four reasons listed in the Reason dropdown applies.**

- Click Update to save the record.




## Quick Steps

1. Click Immunizations in the *Child Data* screen.

2. In the View Records by Status field, select Needed to view which immunizations have not yet been recorded.

3. Click Edit next to the immunization you would like to enter.

4. Enter the Immunization Date.

5. Select N/A for Exemption or Delay and Reason, then click Update.

6. If there is an exemption or delay caused by a circumstance listed in the Reason dropdown, select Exemption or Delay and select the Reason, **leave the date blank**, and click Update.

***Home>Participant>ParticipantInformation> PrenatalandChild>ChildData>ImmunizationRecords***

## Immunizations Continued

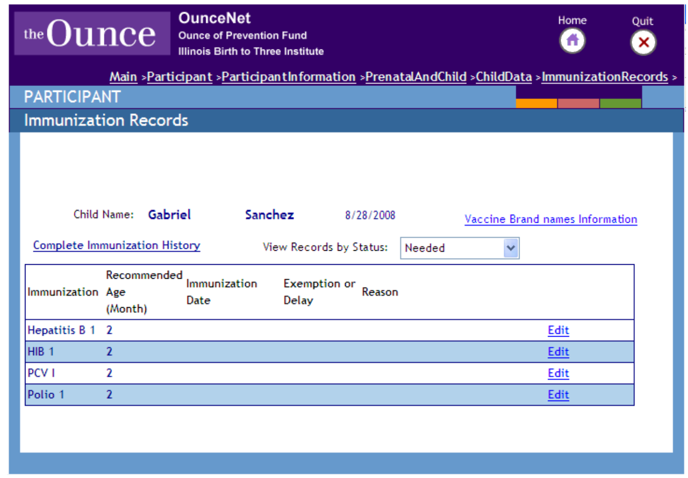
The Immunization Records page has two additional links for your convenience: the Complete Immunization History link and the Vaccine Brand Names Information link.

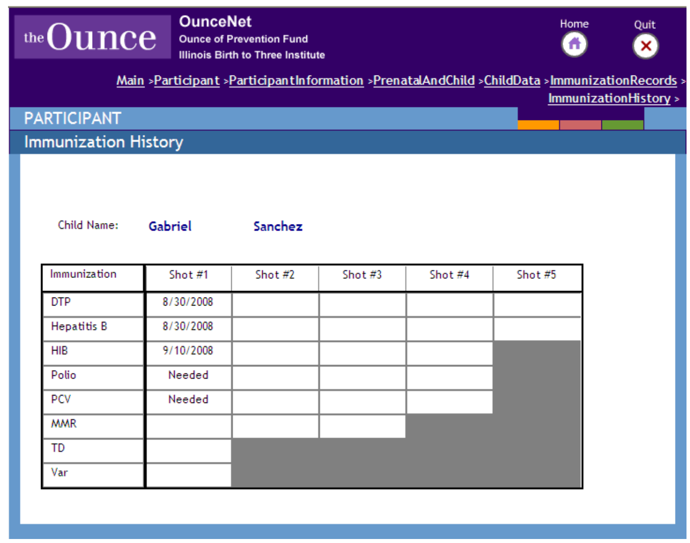
## To View the Immunization History

- Click the Complete Immunization History link.
- This will take you to the *Immunization History* screen, which displays a chart listing all of the immunizations received or still needed for the child, including any exemptions or delays.
- After viewing the chart, simply click *Immunization Records* on the Navigation Bar to return to the prior screen.

## To View Vaccine Information

- Click the Vaccine Brand Names Information link.
- This will open a document displaying the CDC's Advisory Committee on Immunization Practices (ACIP) Recommended Vaccines with Brand Names and Manufacturers. Each vaccine is listed under the disease it is meant to prevent.
- After viewing the list, you may close the window to return to the *Immunization Records* screen.




## Quick Steps

1. Click Complete Immunization History to view the child's immunization chart. Click Immunization Records on the Navigation Bar to return to the prior screen.
2. Click Vaccine Brand Names Information to view the list of immunization names and brands. Close the window to return to the prior screen.

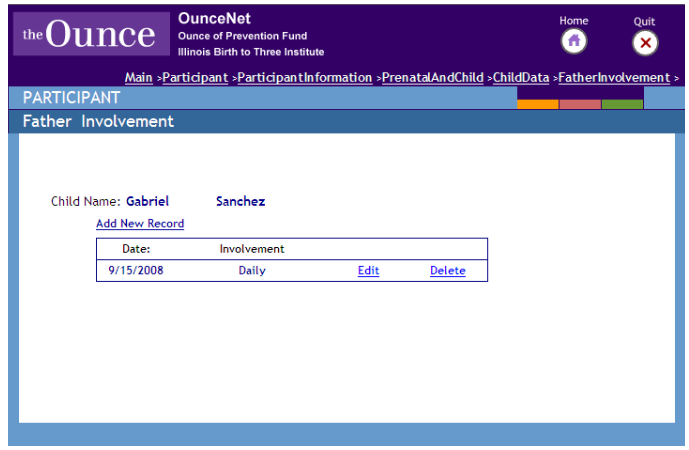
***Home>Participant>ParticipantInformation>PrenatalandChild>ChildData>ImmunizationRecords>ImmunizationHistory***

## Father Involvement

- In the *Child Data* screen, the Last Update and Status information for father involvement is displayed.
- From the *Child Data* screen, click the Father Involvement link. This takes you to the *Father Involvement* screen.

## To Add a New Father Involvement Status

- Click Add New Record.
- In the Date field, enter the date you asked the participant about father involvement.
- Select frequency of father Involvement. Frequency options are Daily, Weekly, Less Than Weekly, Never and Unknown.
- Click Update to save the data you entered.
- To edit a prior record, please refer to the instructions in the introduction.
- After the new frequency is added, return to previous screens by clicking a link on the Navigation Bar or click Quit to leave OunceNet.




## Quick Steps

1. In the *Child Data* screen, click the Father Involvement link.
2. Click Add New Record.
3. Enter Date.
4. Select level of Involvement.
5. Click Update.

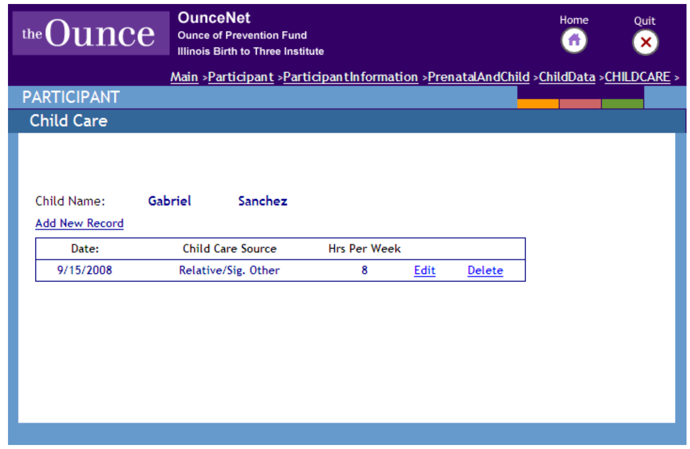
***Home>Participant>ParticipantInformation>PrenatalandChild>ChildData>FatherInvolvement***

## Child Care

- In the *Child Data* screen, click the Child Care link.
- This brings you to the *Child Care* screen.

## To Add a New Child Care Status

- Click Add New Record.
- Enter the date you gathered the information on child care from the participant.
- Select Child Care Source from the dropdown list. Select Home Based if the child is in a home-based day care setting such as a sitter's home. Other options are Child Care Center Based, Relative/Significant Other, Other, or Not Applicable. Select Not Applicable if the participant has no child care.
- Enter the number of Hours of child care Per Week. If the participant has no child care, enter 0.
- Click Update to save the data you entered.
- To edit a prior record, please refer to the instructions in the introduction.
- After the new child care status is added, return to previous screens by clicking a link on the Navigation Bar or click Quit to leave OunceNet.




## Quick Steps

1. Click the Child Care link from the *Child Data* screen.
2. Click Add New Record.
3. Enter the Date.
4. Select the Child Care Source.
5. Enter the number of Hours of child care Per Week.
6. Click Update.

***Home>Participant>ParticipantInformation>PrenatalandChild>ChildData>ChildCare***

## Feeding

- Click the Feeding link on the *Child Data* screen. This takes you to the *Feeding Status* screen.

## To Add a New Feeding Status

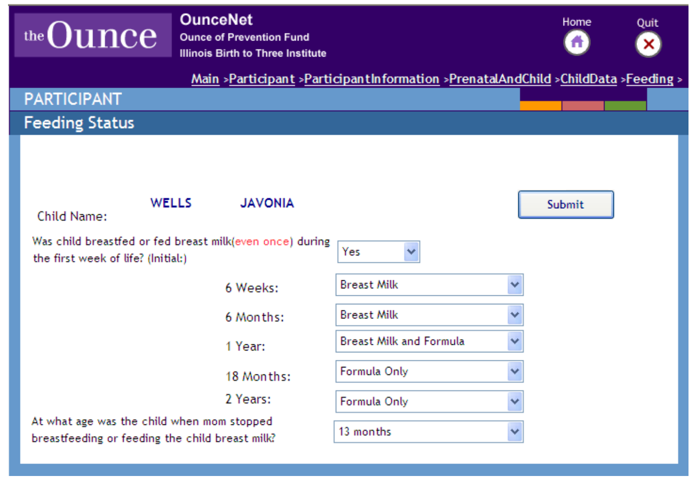
- Click on the appropriate dropdown depending upon the child's age. The first field will be populated based upon the data entered on the *Child Intake* screen.

- Select the feeding status for the child's age. Options are Breast Milk, Breast Milk and Formula, Formula Only, and Unknown.

- When Formula Only is selected, you will be prompted to answer the last question, which asks at what age the child stopped breastfeeding. You may then also fill in all future time points as Formula Only, since the child will not return to breast milk.

- Click Submit to save the data entered.

- After the new status is added, return to previous screens by clicking a link on the Navigation Bar, or click Quit to leave OunceNet.




## Quick Steps

1. Click the Feeding link on the *Child Data* screen.

2. Select options from dropdowns appropriate to child's age.

3. Click Submit.

***Home>Participant>ParticipantInformation>PrenatalandChild>ChildData>FeedingStatus***

# *Service Ledger*

## Service Ledger Screens

### ***Service Ledger***

> *Individual Contact*

> *Home Visit*
> *>Developmental Screenings (Participant Section)*

> *Doula Home Visit*

> *Doula Hospital Service*

> *Group Service*

> *Community Education*

> *Referral*
> *>Referral Follow Ups (Participant Section)*

> *Meeting*

> *Supervision*

# Introduction to Service Ledger

One of the main purposes of the OunceNet system is to capture data concerning the quantity, intensity and diversity of services provided to participants. This is primarily achieved through the Service Ledger screens, where services provided by PTS site staff are recorded. Those involved in the operating, administrating and funding of PTS programs is often pose service-related questions: who were provided what services, when and where, by whom, for how long, and how successfully? The effective use of the Service Ledger screens can efficiently produce accurate responses to these and other questions.

The Service Ledger **IS NOT** intended to track time management. Many of the everyday tasks site staff perform in support of their direct service work are not captured by the limited number of services recorded in OunceNet. The only services that will be recorded in OunceNet are the following:

Individual Contacts
Home Visits
Doula Home Visits
Doula Hospital Services
Group Services
Community Education
Referrals
Meetings
Supervisions

Furthermore, with the exception of Home Visits and Doula Home Visits, services that are incomplete are also not recorded in OunceNet. To save staff time spent on data entry, OunceNet gathers information only on the select array of services it seeks to analyze: services that are specifically contracted in the Program Abstract or directly linked to the achievement of outcomes.

## Using the Service Ledger

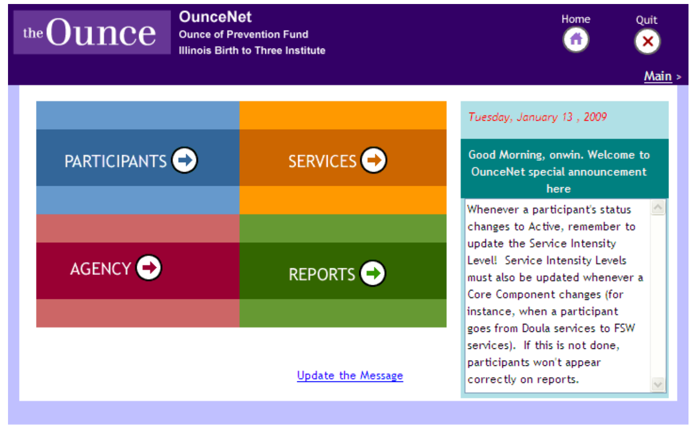
The Service Ledger allows you to record, delete and modify all completed services. Click Services on the *Home* screen to reach the Service Ledger.

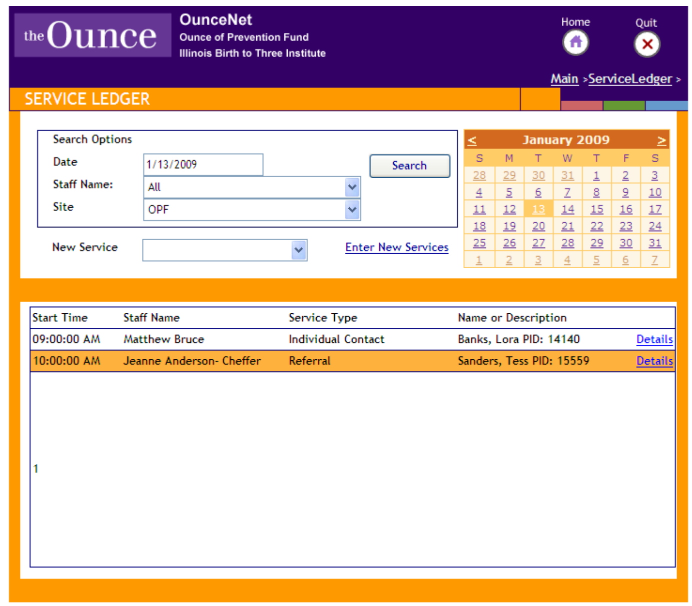
The *Service Ledger* screen contains a calendar that allows you to scroll through days, months and years by simply clicking on the calendar with your mouse.

There are also filter options that allow you to find services for a particular day, staff member and/or site. When you enter a date, staff name or site name and then click Search, OunceNet will find and list for you all of the services for the categories you chose.

There are other areas of OunceNet that will bring you to the *Service Ledger* screen if an entry is required. For example, in the *Participant Referral* screen, there is a link that brings users to the *Referral* page.

In most of the *Service Ledger* screens the Date, Staff Name and Site fields will automatically default to the current date, your name, and your site. If you are entering data for a different date or person, remember to type in the appropriate date and select the appropriate staff person before proceeding.



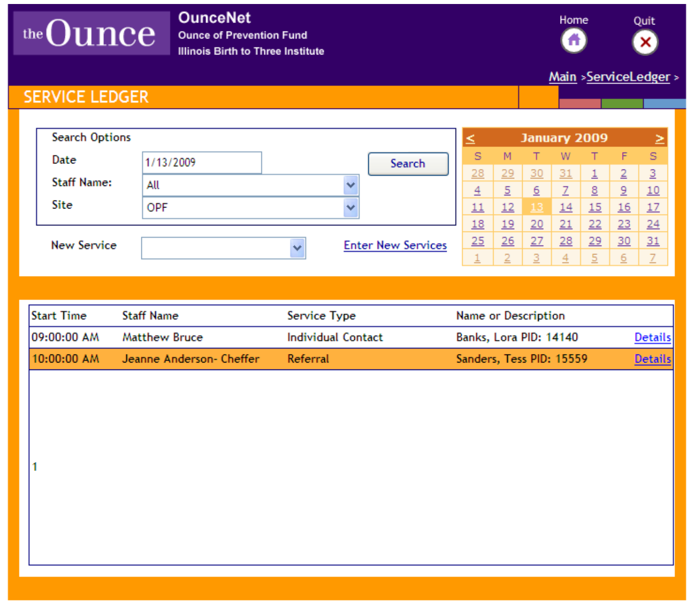

## Quick Steps

1. From the *Home* screen, click Service Ledger.
2. To find a list of services for a certain date, use the following search options:
   - Enter the Date of the services you would like to find if other than the date shown.
   - Select the Staff Name whose services you would like to find if other than the name shown.
3. Click the Search button.

***Home>ServiceLedger***

## Using the Service Ledger

The bottom half of the *Service Ledger* screen shows all entered services for the selected day, according to any specified filters. Otherwise, it will show all data for the entire day according to the staff member who logs into the system. If the entry must be changed, click on Details to modify the entry.




### To Enter a New Service

- In the *Service Ledger* screen, first make sure the appropriate name is in the Staff Name box. If it isn't, simply use the dropdown box to select the correct staff name.
- The Date field will default to the current date. If you would like to enter a service from a prior date, type the prior date over the current date, or click on the appropriate date on the calendar.
- Select the type of New Service you would like to enter from the dropdown list.
- Click Enter New Services and the screen on which to enter the new service will appear.

### To Find Entered Services

- In the *Service Ledger* screen, select All for Staff Name if you would like to see all services for all staff, select a particular name to see only that person's services.
- Enter the date you want by either typing it into the Date field or by simply clicking on the particular date on the calendar.
- Click Search to view all services for the specified staff and date.

### Quick Steps

To enter a new service:

1. From the *Home* Screen, click on the Service Ledger link.
2. Select your name from the Staff Name list.
3. Select the type of New Service.
4. Click Enter New Services.

To find entered services:

1. Select a Staff Name.
2. Enter the date of service in the Date field.
3. Click Search.

## Service Screens

Each type of service entered has its own screen: *Individual Contact, Home Visit, Doula Home Visit, Doula Hospital Service, Group Service, Community Education, Referral, Meeting,* and *Staff Supervision.* There are three areas for each service screen. They are the people involved, General Service Details, and Specific Service Details. These three sections may vary slightly based on the service. Each screen also includes a Submit button. This function will save all work entered in this screen and return the user to the main *Service Ledger* screen.

## Individual Contact

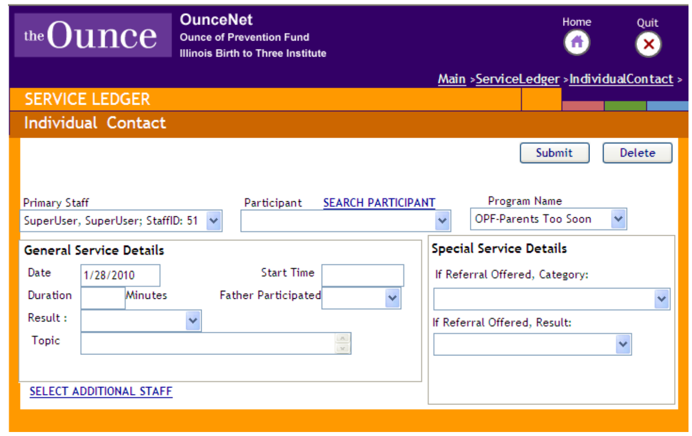
The *Individual Contact* screen is where all new individual contact services are entered.

- Your name will appear in the Primary Staff field. To choose a name other than the one that appears, select one from the dropdown list. Select the Participant from the dropdown list.

- Fill in the service information in the appropriate fields. The date from the *Service Ledger* screen will appear in the Date field, so if you wish to enter another date simply type over it.

- If any other staff members participated in the service, click the Select Additional Staff link. Click Yes in the **second** column next to the name of any other staff person who participated; then click Save.

- When you have entered the data, click Submit to save your record and return to the *Service Ledger* screen.




## Quick Steps

1. Select the Primary Staff if the appropriate name does not already appear.

2. Select the Participant involved.

3. Enter the Date of Service if the correct date does not already appear.

4. Enter the Start Time, Duration, and Result of the Individual Contact.

5. Select whether the Father Participated.

6. Enter the Category and Result of the referral if one was offered. (If more than one referral was offered, enter the additional referrals on the *Referral* screen.)

7. Enter the Topic discussed.

8. Click Submit.

## Home Visit

- Select the Participant's name from the dropdown list.

- Enter the appropriate information in the fields provided. Click on all CB FANA Type options that apply (hold down the Ctrl key on your keyboard to select more than one option). If the visit is Postnatal, click Not Applicable for this field.

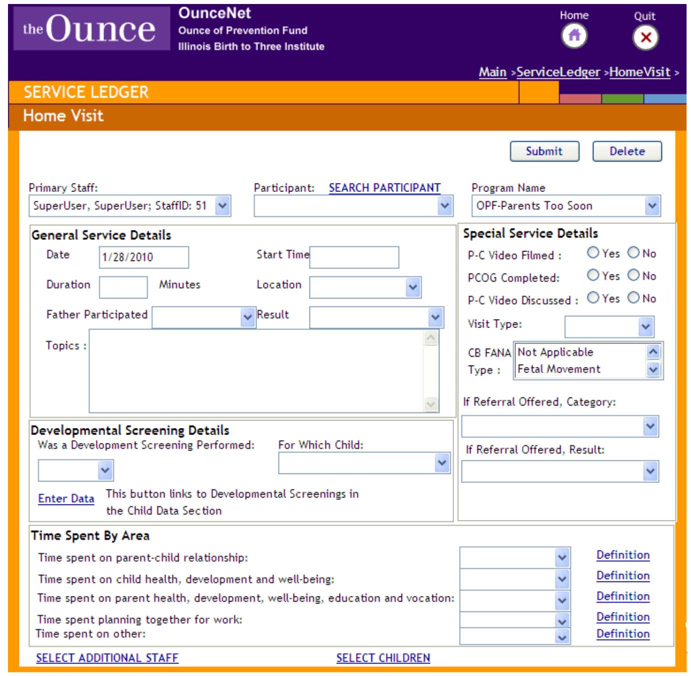
- Indicate whether a Developmental Screening was performed. If a screening was performed, you may click the Enter Data link to fill in the *Developmental Screening* screen. When you have finished entering the information, click Home Visit on the Navigation Bar to return to the *Home Visit* screen.

- Leave the Duration Minutes field blank. Select the number of minutes spent on each service area at the bottom of the page. To see which activities fall under each service area, click the Definition link next to each service area.

- If other staff members attended the Home Visit with you, click the Select Additional Staff link. Click Yes next to their names in the **second** column; then click Save. **Note:** if a Doula attended the visit with you in a combined Home Visit, do not select the Doula as an additional staff member. The Doula portion of the visit will be entered as a Doula Home Visit.

- If the participant has more than one child, click the Select Children link. Click Yes next to the names of all children who were present during the Home Visit, then click Save.

- Click Submit to save your record.




## Quick Steps

1. Select the Participant.

2. Enter the Date, Start Time and Location of service, and select whether Father Participated and Result of the Home Visit. Enter Topics discussed.

3. Click either Yes or No for the Parent-Child Video and Parent Child Observation Guide questions. Select the Visit Type and CB-FANA Type. If a referral was offered, select the Category and Result. (Use the *Referral* screen to enter any additional referrals.)

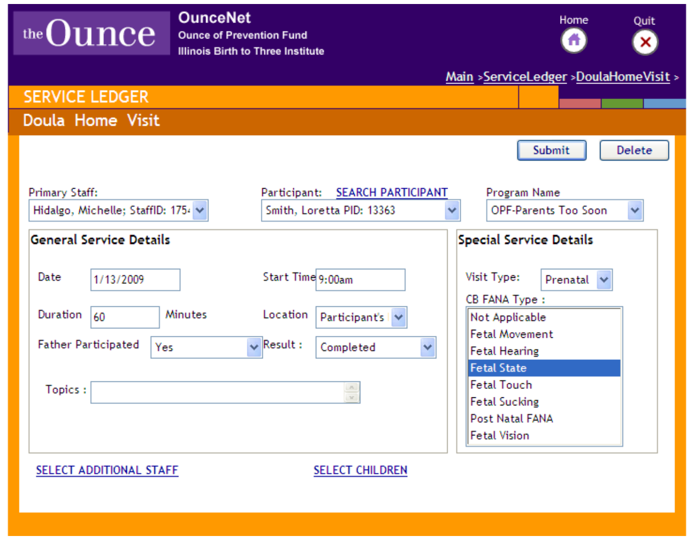
4. Select whether a Developmental Screening was performed and For Which Child. If a screening was performed, click Enter Data to enter the details.

5. Click Submit.

*Home>ServiceLedger>HomeVisit*

## Doula Home Visit

- Select the Participant.
- Enter the service information in the appropriate fields. Remember that Duration is in Minutes, not hours. Check to see that the Date showing is correct; if not, simply type the correct date of the service over it.
- Select whether the Visit Type was Prenatal or Postnatal, and the CB FANA Type (hold down on the Ctrl key to select more than one CB Fana Type).
- If the participant has any children in addition to the pregnancy, click the Select Children link and click Yes next to the names of any children present during the Home Visit. Click Save to save the data and return to the *Doula Home Visit* screen.
- If additional staff were involved in the visit, click Select Additional Staff, which takes you to a list of current staff members. Click Yes in the **second** column next to the names of any additional staff involved in the visit. Click Save to save the data and return to the previous screen. **Note:** if an FSW attended the visit with you in a combined FSW/Doula Home Visit, do not select the FSW as an additional staff member. The FSW portion of the visit will be entered as a separate Home Visit.
- When you have entered the data, click Submit to save your Doula Home Visit record and return to the *Service Ledger* screen.




## Quick Steps

1. Select Participant.
2. Enter the Date, Start Time, Duration and Topics.
3. Select the Location, Result and whether the Father Participated.
4. Select the Visit Type and CB FANA Type.
5. Click Submit.

## Doula Hospital Service

- Doula Hospital Service records include any visit the Doula makes to the participant in the hospital or clinic, whether or not the visit included the actual birth.

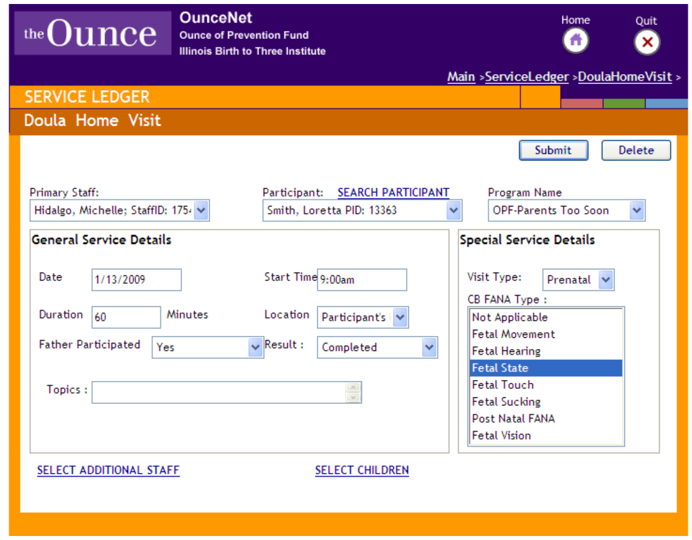
- To ensure that the Doula receives credit for attending a birth, it is important to enter the data on the *Doula Data* screen also. The *Doula Data* screen is accessed through the *Child Intake* screen.

- Enter the Date, Start Time, and Duration. Remember to enter the duration in minutes, not hours.

- Select whether or not the Father Participated, the Result of the hospital service, and who Initiated the service.

- If additional staff were involved, click Select Additional Staff, which takes you to a list of current staff members. Click Yes in the **second** column next to the names of any additional staff Involved. (The person entering the data will automatically be selected as the Primary Staff, but you may also change this designation if you wish.) Click Save to save the data and return to the *Doula Hospital Service* screen.

- When you have entered the data, click Submit to save your record and return to the *Service Ledger* screen.



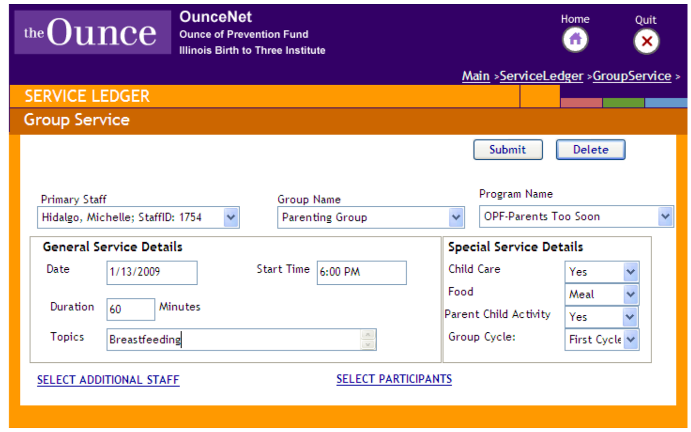

## Quick Steps

1. Select Participant.
2. Enter the Date, Start Time and Duration.
3. Select the Result and whether the Father Participated.
4. Select who Initiated the service.
5. Click Submit.

## Group Service

The *Group Service* screen is where the details and attendance of each individual group session are recorded.

- Select the Group Name.
- Enter the Date, Start Time, Duration of the group in minutes, and Topics.
- Select whether Child Care, Food and any Parent Child Activity were included in the group service.
- Select the Group Cycle. If your program does not use cycles in group services, you may select First Cycle to indicate an annual cycle.
- Click Select Participants and then click Yes next to the names of all participants who attended that particular group session. Click Save to return to the *Group Service* screen.
- To add additional staff present for the group, click the Select Additional Staff link. The first column will indicate the person entering the service as the Primary Staff, but you may change this designation if you wish. Under the second column, labeled Involved, click Yes next to the names of any other staff present for the group session. Click Save to return to the *Group Service* screen.
- When you have entered the data, click Submit to save the group service record and return to the *Service Ledger* screen.




## Quick Steps

1. Select Group Name.
2. Enter the Date, Start Time, Duration and group Topics.
3. Select Child Care, Food, Parent Child Activity, and Group Cycle.
4. Click Select Participants, then click Yes next to the names of group attendees and click Save.
5. Click Submit.

***Home>ServiceLedger>GroupService***

## Community Education

- To enter a community education service, first select the Primary Staff person involved in the event.

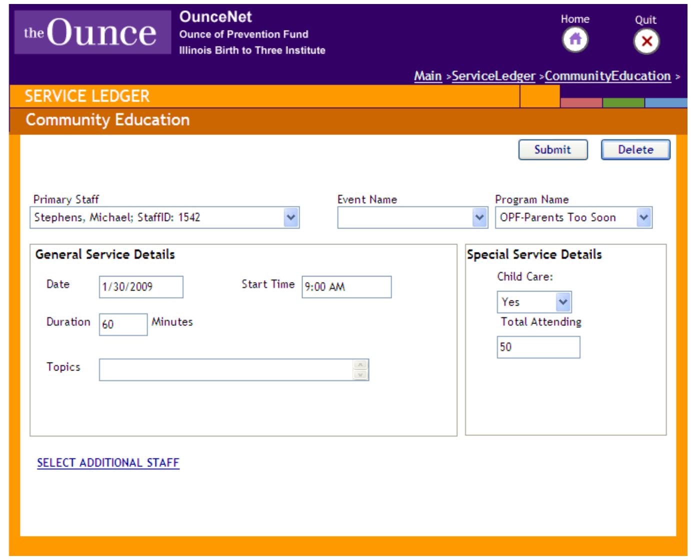
- Select an Event Name. The dropdown list of event names will be those that were entered into your program's contract at the beginning of the year. If you do not see the specific name of your event in the dropdown, select the general Community Event title from the dropdown list.

- Enter the Date, Start Time, Duration in minutes, and Topics discussed. If you chose Community Event as the name of your event, enter the actual name of the event here.

- In Special Service Details, select whether Child Care was provided, and enter the number of people who attended the event.

- To add additional staff who participated in the event, click the Select Additional Staff link, which takes you to a list of current staff members.
  - There are two columns. Under the Primary Staff column, choose only one staff name as the staff person most responsible for the event. If more than one person shared equal responsibility, just choose one name among them.
  - Under the Involved column, click Yes next to the names of all other staff who participated in the event.
  - Click Save to save this data and return to the *Community Education* screen.

- When you have entered the data, click Submit to save your record and return to the *Service Ledger* screen.




## Quick Steps

1. Select Primary Staff, Event Name and Program Name.

2. Enter Date, Start Time, Duration and Topics.

3. Select whether Child Care was provided and enter Total Attending the event.

4. If there were additional staff participating, click Select Additional Staff. Click Yes next to the names of the Primary Staff and other staff Involved.

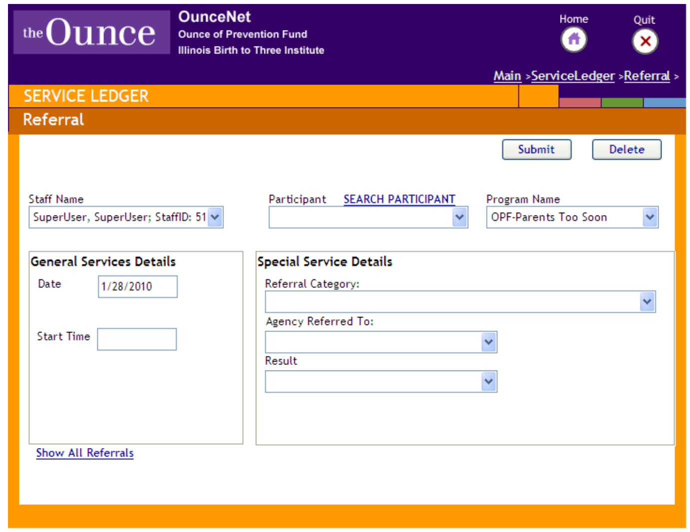
5. Click Save.

6. Click Submit.

## Referral

When you provide participants with referrals to other programs, you should document these referrals on the *Referral* screen in the Service Ledger.

- To enter a referral in the Service Ledger, first select the Staff Name who provided the referral.
- Next, select the Participant who received the referral.
- Enter the service Date and Start Time that you provided the referral to the participant.
- Select the Referral Category and Agency Referred To. You may leave this field blank unless you would like to specify the agency.
- Select a Result to indicate the referral status. If you do not yet know the result of the referral, you may leave this field blank or select Unknown, and fill it in at a future date.
- If you wish to see all prior referrals entered into OunceNet for the participant, you may click the Show All Referrals link.
- When you have entered the data, click Submit to save your record and return to the *Service Ledger* screen.




## Quick Steps

1. Select Staff Name and Participant.
2. Enter the Date and Start Time.
3. Select the Referral Category, Agency Referred To, and Result.
4. Click Submit.

*Home>ServiceLedger>Referral*

## Meeting

- Select the Meeting Type.

- Enter the Date, Start Time, Duration in minutes, and Topics discussed.

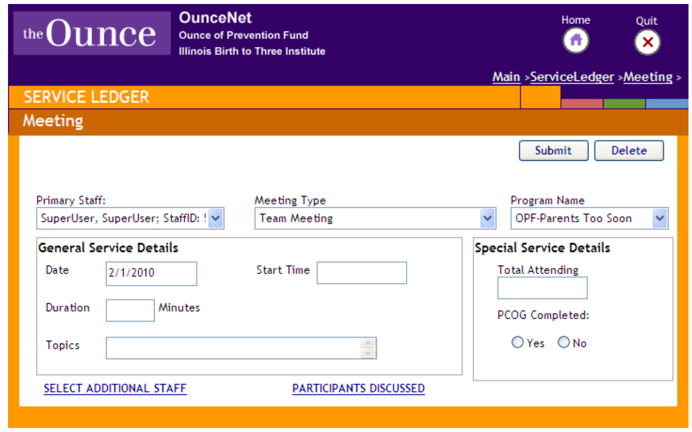
- Enter the number for Total Attending. For Team Meetings and Staffings, indicate whether a PCOG (Parent Child Observation Guide) was included.

- On the very bottom of the Meeting service screen, there are two links: Select Additional Staff and Participants Discussed.

- To indicate who participated in the meeting, click the Select Additional Staff link, which takes you to a list of current staff members.
  - Under the Primary Staff column, click Yes next to the one staff person most responsible for the meeting. OunceNet automatically selects the person entering the data, but you may change the designation if you wish.
  - Under the Involved column, click Yes next to the names of all other staff who attended the meeting.
  - Click Save to save this data and return to the *Meeting* screen.

- To indicate which, if any, participants were discussed during the meeting, click the Participants Discussed link.
  - This link takes you to a list of participants in the program. Click Yes next to the name of each participant discussed during this meeting.
  - Click Save to save this data and return to the *Meeting* screen.

- Click Submit to save your data.



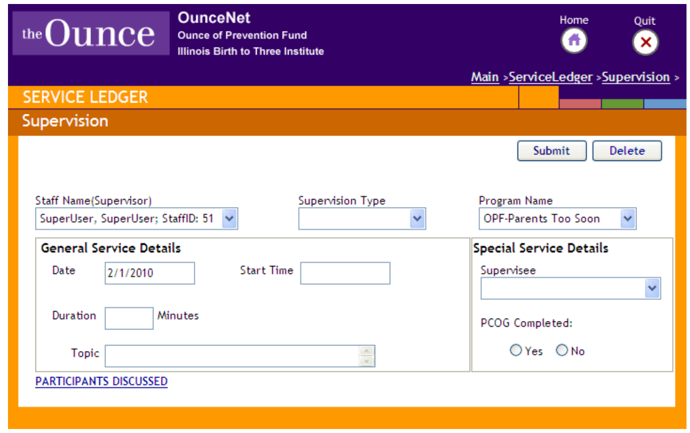

## Quick Steps

1. Select Meeting Type.
2. Enter the Date, Start Time, Duration and Topics discussed.
3. Enter the Total Attending and whether a PCOG was completed.
4. Click Select Additional Staff.
5. Click Yes in the **second** column next to the names of staff Involved in the meeting, then click Save.
6. Click Participants Discussed if any participants were discussed during the meeting.
7. Click Yes next to the name of any participants discussed during the meeting, then click Save.
8. Click Submit.

## Supervision

The *Supervision* screen is only used by those who conduct and enter supervisions.

- In the *Supervision* screen, select the Staff Name (Supervisor) and Supervision Type from the dropdown lists.
- Enter the Date, Start Time, Duration and Topic discussed during supervision.
- Select the Supervisee.
- Indicate whether a PCOG (Parent Child Observation Guide) was included in the supervision.
- Click on the Participants Discussed link, which is located at the very bottom of the *Supervision* screen.
  - Under Involved, click Yes next to the name of any participant discussed during the supervision. All other participant names will remain under their default status, No. Use your best judgment in choosing who was discussed. Generally you include any participant who was a major topic of discussion at the meeting.
  - Click Save to save your data and return to the *Supervision* screen.
- When you have entered the data, click Submit to save your record and return to the *Service Ledger* screen.




## Quick Steps

1. Select the Staff Name of the supervisor and Supervision Type.
2. Enter the Date, Start Time, Duration and Topic.
3. Select the Supervisee.
4. Indicate whether a PCOG was completed.
5. Click Participants Discussed.
6. Click Yes next to the names of any participants discussed, then click Save.
7. Click Submit.

# *Agency*

# Agency Screens

***Agency***

- ***>Staff***
  - ***>Staff Profile***
- ***>Groups***
  - ***>Group Profile***
    - ***>Group Members***
      - ***>Manage Group Members***
- ***>Referral Library***
  - ***>Referral Profile***

# Introduction to Agency

The Agency section of OunceNet houses agency group, referral, staff and demographic information, as well as contractual obligations. The OunceNet team enters contracts and demographics for you; therefore, much of the Agency section you need not learn how to use. However, you will use the Agency section whenever you need to enter a new staff person or close out a departing staff member. You may also use the Agency section to quickly add and remove participants from group rosters, or to update referral agency information.

Data must be entered into the Agency section first, before other sections of OunceNet are ready to be utilized. Much of the data you enter in the Agency section of OunceNet will appear in other areas throughout the OunceNet system. For instance, when you enter a new group member in the Agency section, you will then be able to enter their attendance in the Service Ledger. When you enter a new staff person in the Agency section, that person's name will appear in staff lists throughout OunceNet. If a dropdown list in any other section of OunceNet does not display the option you seek, chances are it is because the data was not first entered in the Agency section. Therefore, entering data in the Agency section correctly is critical to ensuring that other sections of OunceNet function properly.

### Getting to Agency

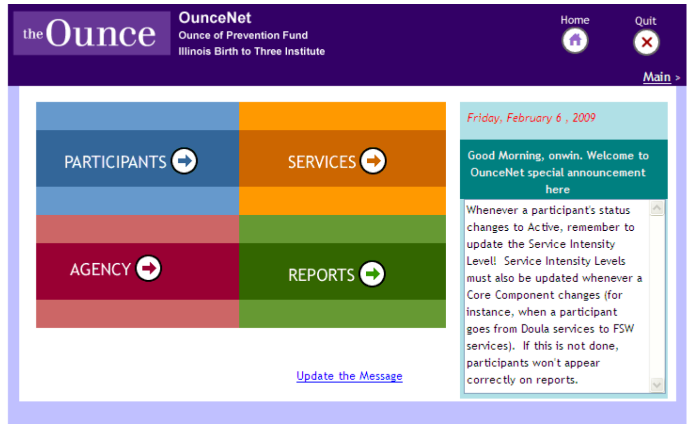
From the Home screen, click the Agency button. This brings you to the *Agency* screen. From the main *Agency* screen, you can link to any area of the Agency section: Programs, Staff, Groups, Agency Profile and Referral Library.

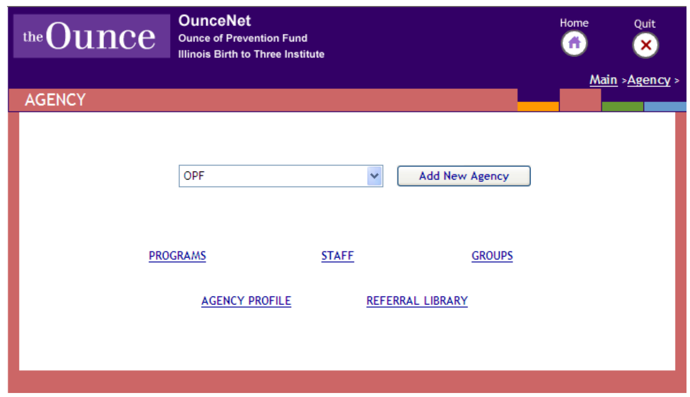
### Programs and Agency Profile

The *Programs* section houses the Contractual Obligations of your program, including each new contract and amendment. The *Agency Profile* provides your agency's geographic and demographic information for research purposes and KIDS PEPP advocacy work.

Because information for the *Programs* and *Agency Profile* sections is entered by OunceNet staff, you need not use these links.

The following sections will outline how to use the Staff, Groups and Referral Library sections of OunceNet.



## Staff

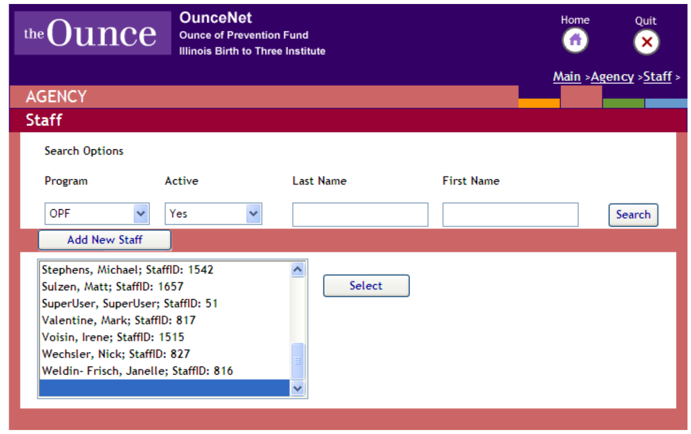
The staff section of OunceNet is where staff demographic information is entered and job type is assigned according to your program contract. You may then assign the staff's password and login name. When new staff members are entered into the system, their names become accessible in dropdown lists throughout the system.

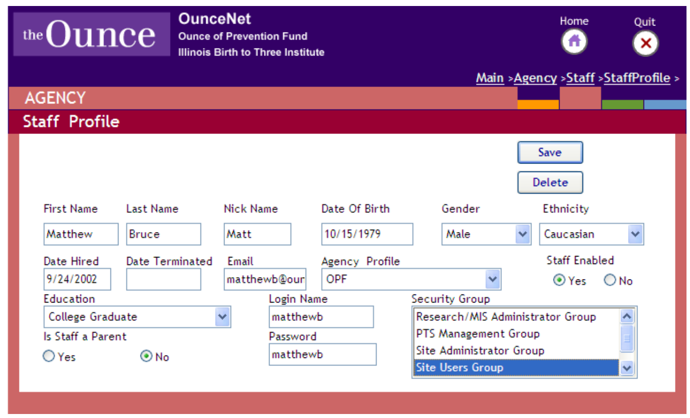
You will also need to access staff profiles when a staff person's information changes, or when they leave your agency. So to begin, let's go over how to find a staff profile already entered in the system.

### To Find a Staff Profile

- In the *Agency* screen, click the Staff link. This brings you to the *Staff* screen.
- If the staff person is currently employed with you and uses OunceNet, select Yes in the Active field and then click Search. If the staff person has left the agency, does not use OunceNet in their position, or otherwise does not appear in the Active list, click No in the Active field, then click Search.
- In the bottom left hand corner, all staff currently employed will appear. Use the scroll bar on the right side of the list to scroll through the names if needed.
- Highlight the desired name.
- Click Select and the staff's profile will appear.

Note: you may also search by first and/or last name to find a staff person more quickly. If it does not appear using this method, however, simply use the steps above.



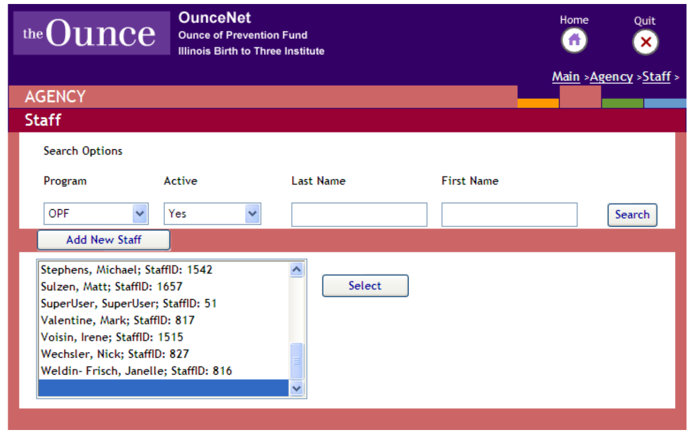

### Quick Steps

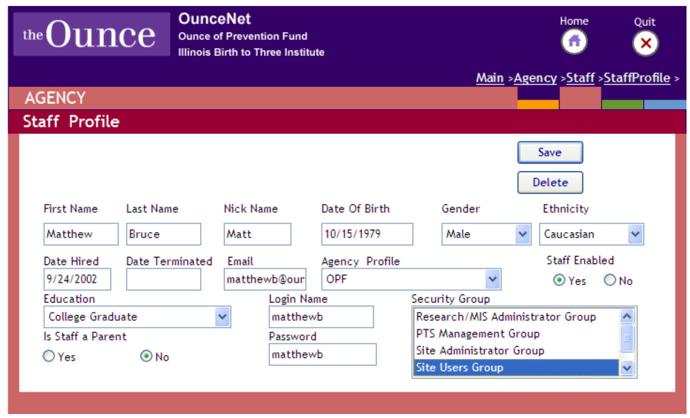
1. Select Yes or No to indicate if staff is currently Active (employed and using OunceNet) in your agency.
2. Enter staff's First Name and/or Last Name if desired.
3. Click Search.
4. Highlight the staff person's name.
5. Click Select.

***Home>Agency>Staff>StaffProfile***

## To Add a New Staff Profile

- In the *Agency* screen, click the Staff link. This brings you to the *Staff* screen.
- Click the option to Add New Staff.
- Enter in the staff person's First and Last Name, and if applicable, a Nick Name.
- Enter the Date of Birth and select the Gender and Ethnicity.
- Enter the Date Hired.
- Date Terminated is only used when a staff person leaves the agency. This field is not used if a staff person changes roles within the agency.
- Enter the staff member's e-mail address.
- Click Yes for Staff Enabled if their position requires access to OunceNet; otherwise, click No.
- Select Education level and indicate if the staff member is a parent.
- Select the staff member's Security Group. For most staff this will be Site Users Group. For Program Directors and MIS Contacts, click Site Administrator Group.
- *If you are a Program Director or the MIS contact*, enter the Password and Login Name. If you are not a Program Director or the MIS Contact, the system will not let you save a Password or Login Name. Seek the help of your MIS Contact or supervisor if needed.
- After the page is filled out, click Save to save the data. This will also return you to the *Staff* screen.




## Quick Steps

2. Click Staff from the *Agency* screen, then click Add New Staff.
3. Type in the staff's First and Last Name, Date Hired and Date of Birth. From the drop-down lists select the staff's Gender, Ethnicity and Education Level; select whether staff is a Parent.
4. Click Yes for Staff Enabled if the staff person will be using OunceNet. Assign a Password and Login Name.
5. Select Site Users Group (for most staff) or Staff Administrator Group (for supervisors and MIS Contacts) for the Security Group.
6. Click Save.

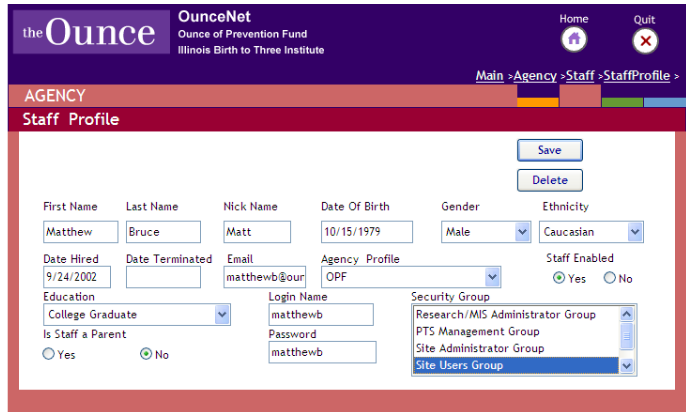
***Home>Agency>Staff***

## To Change a Staff Profile

- Find the person's staff profile using the instructions listed in the prior pages.
- Simply re-enter any information that needs to be changed, then click Save and the changes will be permanent.
- Note: Do not click Delete when a staff member leaves the agency. (See directions below.) Delete is generally only used when a staff member's profile was mistakenly entered twice.

## To Update the Staff Profile When a Staff Person Leaves the Agency

- Find the person's staff profile using the instructions listed in the prior pages.
- Enter the Date Terminated for the staff person.
- Click No under Staff Enabled. This ensures that the former staff member no longer has access to OunceNet and removes their name from the system.
- Click Save. This will bring the user back to the *Staff* screen.
- As stated above, do not click Delete when a staff member leaves the program, as this will erase any record of the employee.
- **Note:** Clicking No under Staff Enabled will remove the staff member's name from the rest of OunceNet. Should you need the name to reappear in other parts of OunceNet (for instance, to update old data) simply change No back to Yes and click Save. After you make any needed changes, you may then return to this page and change Yes back to No.




## Quick Steps

1. Edit any information as necessary.
2. If the staff person has left the agency, enter the Termination Date and click No for Staff Enabled.
3. Click Save.

***Home>Agency>Staff>StaffProfile***

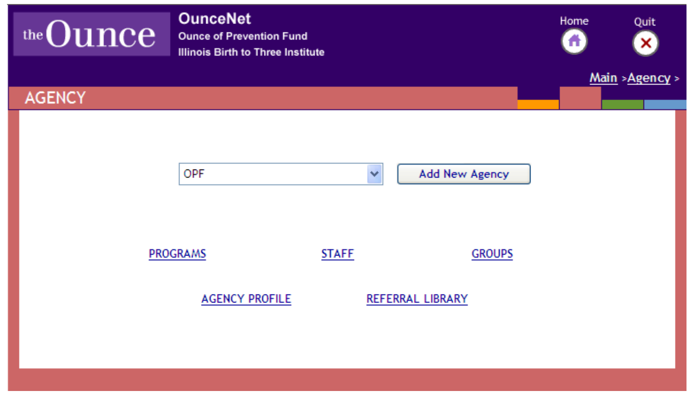
## Groups

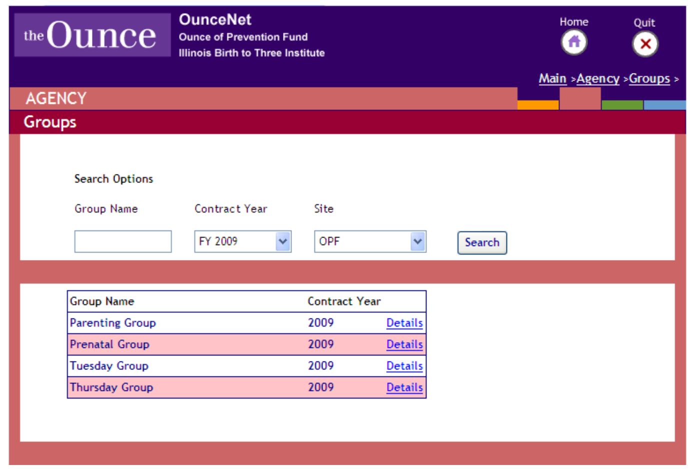
In the Group Section, you can view the details of a group or add participants to its roster. To reach the *Groups* screen, click the Groups link on the *Agency* screen. The *Groups* screen will display all groups that have been entered into your system.

Note that this section is **not** where new groups are first entered into OunceNet. Only groups already entered will appear. To enter a new group into your program, please call the OunceNet Help Line for assistance.

## To Find a Group

- Select the Fiscal Year the group was held. If the fiscal year is unknown, select the blank line at the bottom of the Fiscal Year dropdown list.
- Click Search; the groups occurring in the fiscal year you chose will appear at the bottom of the screen.
- Click Details of the desired group. The *Group Profile* screen will then appear.
- Note: you may narrow your search by also typing in the Group Name if you know it.




## Quick Steps

1. Click Groups on the *Agency* screen.
2. Select the Fiscal Year the group was held.
3. Click Search.
4. Click Details next to the group you would like to see.

## Managing the Group Roster

- On the *Group Profile* screen, click the Group Members link. This brings you to the *Group Members* screen, where a list of group members will appear.

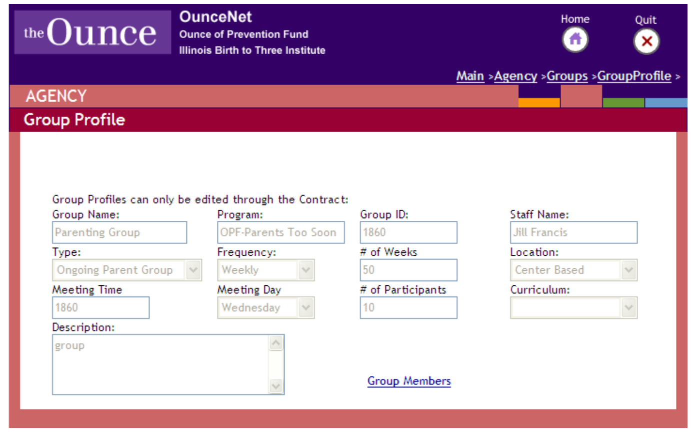
## To Add Group Members to a Roster

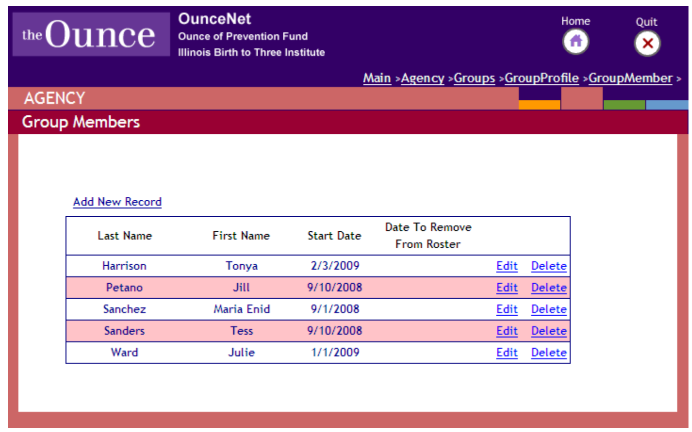
- Click Add New Record. This brings you to the *Manage Group Members* screen.
- Search for the participant's name by scrolling through the participant list. You may also use the Search filters at the top of the screen to find a name.
- Highlight the Participant's name, enter the Start Date and click Save.
- Repeat the process to add each new group member.

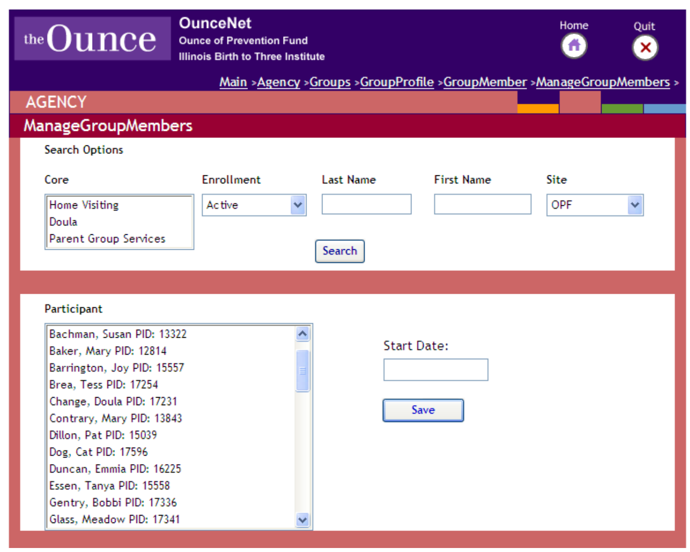
## To Remove Group Members from a Roster

- From the *Group Members* screen, click Edit next to the name you would like to remove from the roster.
- Enter the Date To Remove From Roster.
- Click Update.
- If the participant has never attended the group, you may click Delete next to the name to remove the record entirely. Otherwise, Delete should not be used, as this will erase all history of attendance.

**Note:** This screen is not where group attendance is entered. To document group attendance after each session, see the Service Ledger section of this manual.



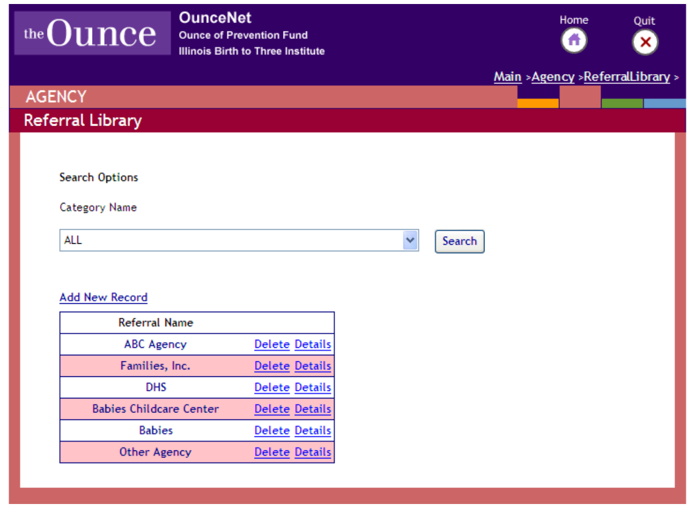

***Home>Agency>Groups>GroupProfile> GroupMembers>ManageGroupMembers***

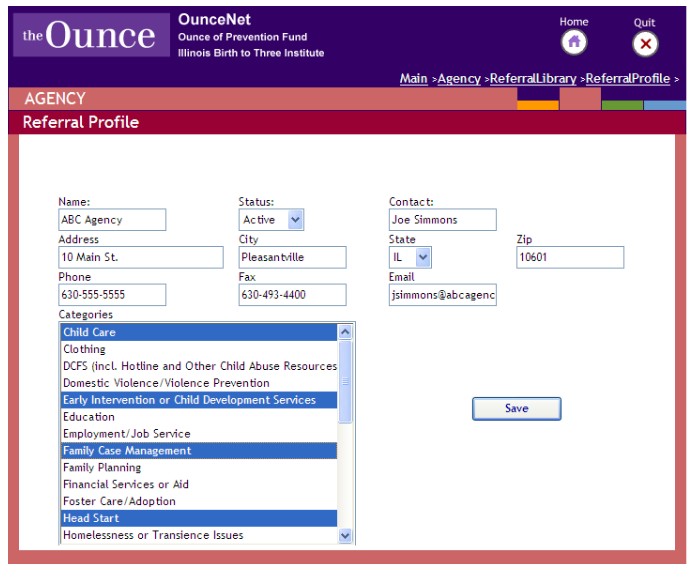
## Referral Library

- From the *Home* screen, choose Agency.
- In the *Agency* screen, click the Referral Library link. This brings you to the *Referral Library* screen.

## To Add a New Referral Agency

- Click the Add New Record link.
- The link will bring the user to the *Referral Profile* screen. This screen will ask for pertinent referral information.
- Enter the agency's information in the required fields. Certain fields, such as Fax and Email, you may leave blank if you do not know them. For Status, select Active if you are still using the agency and Inactive if you no longer use the agency.
- There is a multi-pick box for the Categories of services that the agency provides. Click all categories that apply for the agency. To select multiple categories for an agency, click all categories that apply while holding down on the Control (Ctrl) key on your keyboard. To remove a category you have selected, hold down on the Control key and click on that category. **Select all the categories that apply to the agency, because the agency will appear in OunceNet only under the categories you select.**
- Click Save to save your data.



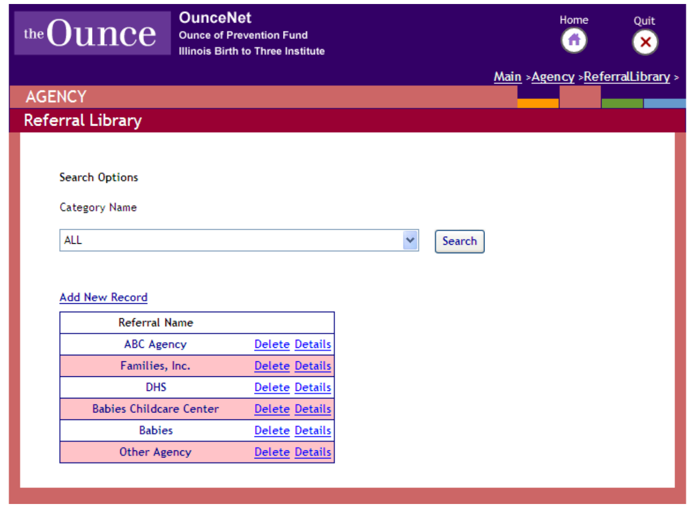

## Quick Steps

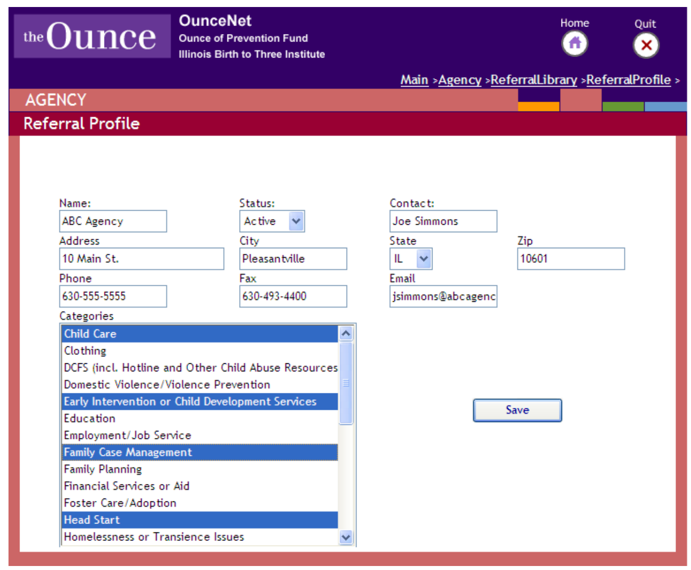
1. Click Referral Library on the *Agency* screen.
2. Click Add New Record.
3. Enter agency information.
4. Select all Categories of services the agency provides, using the Cntrl key to select more than one.
5. Click Save.

***Home>Agency>ReferralLibrary>ReferralProfile***

## To Modify an Existing Referral Agency

- When the *Referral Library* screen appears, it will have an option to filter referrals by category at the top of the page.
- Choose the referral category desired. If you are unsure of the category, you may select All to list all referrals.
- Click Search. A list of referral agencies falling under this category will appear, along with options to either Delete or look at Details.
- To delete a referral agency from the list, click Delete. The referral agency is then removed from the list and from OunceNet.
- To look at the Details of a referral agency, select Details.
- This link brings the user to the *Referral Profile* screen. This screen provides all of the information about the agency.
- All services provided by the agency should be highlighted in the Categories listing box. To add any additional categories, hold down on the Control (Ctrl) key on your keyboard and click on any additional categories that apply. The agency will then appear under these categories on the Referral screen of the Service Ledger.
- If you edit any information on this screen, click Save to save your changes.




## Quick Steps

1. Select Category Name of referral agency, using All if category is not known.
2. Click Search.
3. Click Details next to the name of the referral you would like to see. (Click Delete to remove the referral entirely.)
4. View or edit any information as needed and click Save.

# *Reports*

# Report Screens

## Listing Reports

***>Birth Outcome Indicators***
***>Case Listing***
***>Child Feeding***
***>Child List***
***>Child Outcome Indicators***
***>Developmental Screenings***
***>Doula Home Visit Grid***
***>Doula Outcomes***
***>Doula Participants***
***>Doula Services***
***>Doula Visit Analysis***
***>Group Attendance Grid***
***>Group Roster***
***>Happy Birthday***
***>Happy Birthday Kids***
***>Home Visit***
***>Home Visit Grid***
***>Immunization History***
***>Individual Contact Grid***
***>Intake***
***>Level Analysis***
***>Parental Efficacy***
***>Parental Efficacy Summary***
***>Participant Activity***
***>Participant Enrollment History***
***>Participant List***
***>Participant Mailing Labels***
***>Participant Outcome Indicators***
***>Pregnancy***
***>Referral Statistics***
***>Service***
***>Service Statistics***
***>Staff Activity***
***>Staffing***
***>Tickler: Child Feeding***
***>Tickler: Child Outcome Indicators***
***>Tickler: Developmental Screenings***
***>Tickler: Missing Quarterly Data***
***>Tickler: Participant Outcome Indicators***
***>When Was Screening Performed***

## Administrative Reports

***>CPS Quarterly***
***>DHS Child Outcomes***
***>DHS Participant Education***
***>Doula Quarterly Doula Active***
***>Doula Quarterly Summary Aggregate***
***>Doula Quarterly Summary Doula Active***
***>HFI Quarterly***
***>ISBE Program Record***
***>OunceNet Quarterly***
***>OunceNet Quarterly Summary***

# Introduction to Reports

The Reports section is used to access data about your program. By running reports you are able to access and categorize statistical information on participants, services, staff, and accounts. There are several types of reports in OunceNet, but they fall into two main categories: Listing and Administrative.

### Listing Reports

Listing Reports provide lists of data for your program broken down by participant or service. These reports are used to manage your caseload, check data to make sure it was entered correctly, and to ensure the individual data matches the OunceNet Quarterly report. The data in Listing Reports is usually grouped by participant, child, service or staff member. Grids provide the same type of information as Listing Reports but present the information in a grid format.

### Administrative Reports

Administrative Reports are most often those that are run on a regular periodic basis, such as quarterly reports. They provide data and summary statistics on your program that can be used for administrative and accounting purposes. Unlike Listing Reports, Administrative Reports don’t include the names of program staff or participants; instead, they provide numbers and aggregate data. Administrative Reports give information on program outcomes, which can then be used to determine if the program is meeting its goals. In addition to accountability purposes, Administrative Reports can also be used to manage and develop your program.

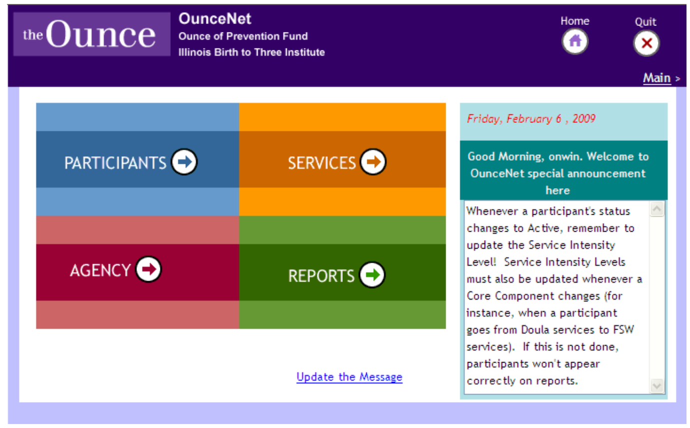
## Running a report

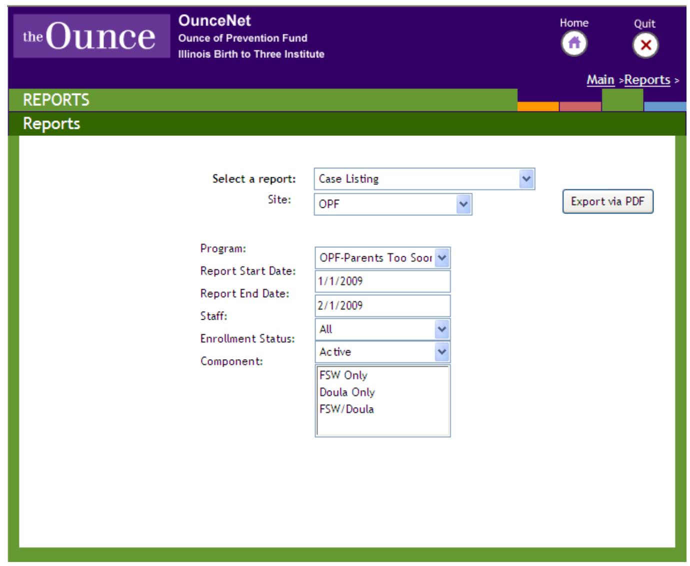
All reports are run in the same way. To run a report:

- Click Reports on your *Home* screen. This brings you to the *Reports* screen.
- On the *Reports* screen, select the type of report you would like to run from the drop-down list. (You will need to use the scroll bar on the right side of the box to view the entire list of choices.) When you select a report to run, the fields from which you must choose parameters will then appear.
- Select or enter the parameters of the report you would like to run.
- When you have selected the parameters, click Export via PDF. This will run the report.

The report will then appear on your screen. At the top of the report you will see the name of the report and the parameters you chose. At the bottom of each page of the report you will see the date, the time the report was run, and the name of the person who ran the report.

You may now print the report, save it to your computer, or send it to a recipient by e-mail in PDF format.




## Quick Steps

1. Click Reports on *Home* screen.
2. Select the report to run.
3. Select or enter your choices for all parameter fields that appear for that report.
4. Click Export via PDF.

## Listing Reports

### Birth Outcome Indicators

The Birth Outcome Indicators report presents a list of births and information about each birth. It is meant to match exactly the figures generated by the OunceNet Quarterly report. The report displays the date of birth, delivery type, birth weight, weight category, whether it is a subsequent birth in the program, and breastfeeding initiation. The bottom of the report displays the results by category of each outcome indicator. This report is usually most helpful to direct service staff.

### Case Listing

The Case Listing report groups participants by FSW to present a listing of caseloads. The case list includes basic demographic and program data such as age, address, Service Intensity Level, and Enrollment Status as of the End Date. The report includes the capacity point total of each caseload for the End Date you choose. For direct service staff, this report is helpful in keeping up-to-date with changes in the caseload. Supervisors will also find this report helpful in identifying which participants are assigned to which staff member's caseload.

### Child Feeding

The Child Feeding report is a basic listing of all feeding records for every child that meets the parameters you choose, grouped by staff name and parent. Each child is listed with his or her date of birth and feeding information at the time points of birth, six weeks, six months and one year.

### Child List

The Child List report is a basic listing of children in the program, their date of birth, age, gender, ethnicity and Service Intensity Level. The list is grouped by the parent's service type and includes the total number for each service type.

### Child Outcome Indicators

The Child Outcome Indicators report is the children's equivalent of the Participant Outcome Indicators report. It first lists all target children grouped by their FSW so that the status of each is shown on developmental screens, immunizations, well child visits, father involvement, feeding and child care. It then summarizes for each FSW the counts for each outcome, including any missing data. Finally, it breaks down the subtotals and percentages of each outcome for the program.

### Developmental Screenings

The Developmental Screenings report assembles a list of developmental screenings performed by staff during a given period of time. The list of screenings includes the child's name, date of birth, instrument used, date of screening, and referral decision. The lists are grouped by staff name and totaled for each staff. The counts for each staff person are then broken down by child age and referral decisions. The end of the report also shows aggregated staff screenings broken down into the same categories. The numbers match those of the OunceNet Quarterly report.

### Doula Case Listing

The Doula Case Listing report groups participants by Doula to present a listing of caseloads. The case list includes basic demographic and program data such as age, address, Service Intensity Level, and Enrollment Status as of the End Date.

### Doula Home Visit Grid

The Doula Home Visit Grid shows what days Doula Home Visits occurred with participants. To do this it arranges 32 columns going across the page horizontally. The first column is a participant name, and the remaining columns each represent one day of the month. The report views one month at a time. For each participant and each day the data shows if a Doula Home Visit was scheduled for that day and the result of each visit.

### Doula Outcomes

The Doula Outcomes report is a list of all births to participants Active in the Doula component between the dates you select. The report is grouped by Doula Only and FSW/Doula services. It assembles data about each birth including the assigned Doula, pregnancy outcome, Doula and father attendance, c-sections, epidurals, breast feeding (at birth, 6 weeks, 6 months and 1 year) and the number of Home Visits they have received (prenatal and postnatal Doula visits as well as FSW visits).

### Doula Participants

The Doula Participants report is a list of all participants Active in the Doula Component between the dates you select. The report is grouped by Doula Only and FSW/Doula services. It assembles data about each participant including the assigned Doula, the pregnancy status, the length of engagement in the program, and the number of Doula services they have received-- including prenatal and postnatal Doula visits, FSW visits, the number of groups, and the number and duration of hospital services.

### Doula Services

The Doula Services report assembles a list of Doula services including the participant, date, time, duration, number served, result, Home Visit type and CBFANA type. It lists the basic counts and totals of this data by staff name and service type (Doula Home Visits, Hospital Service, and Group).

### Doula Visit Analysis

The Doula Visit Analysis report presents the numbers of completed, attempted and expected Doula Home Visits and FSW Home Visits for each participant, both prenatal and postnatal. The numbers are grouped by staff name and separated by short and long term services. The report also provides the overall totals with the percentages of completed and attempted visits as compared to expected, as well as the percentage of completed visits as compared to attempted.

### FSC Assessment Totals

This report lists the FSC Assessments that took place during the quarter by participant, as well as the score and enrollment result for each. Result totals and percentages are listed at the bottom of the report.

### Group Attendance Grid

The Group Attendance Grid shows a grid with one row for every participant on the group roster. It lists participant names, staff names, the total number of sessions and the total number of sessions attended. The grid also shows the individual group sessions to a maximum of 16 group sessions, with a date in the appropriate column if a participant attended that session. The report totals the participants, counts attendance and determines the attendance rate percentage.

### Group Roster

The Group Roster report generates the roster of the group you choose. It assembles group members with address data and basic attendance statistics, sorted by whether they are long term, short term or non-attending. It also displays the number of group members in each group, the number of sessions held, the average number of participants per session and the attendance rate percentage. The Group Roster is a list of all those enrolled in a given group rather than only those who are actually attending.

### Happy Birthday

The Happy Birthday report creates a list of all participants' birthdays and ages listed by month.

### Happy Birthday Kids

The Happy Birthday Kids report is the list of children's birthdays and ages. The children appearing are the same as those on the Child List report.

### Home Visit

The Home Visit report presents a list of Home Visits by staff name and gives basic totals for each staff person. The report also displays the date, time and duration of each visit, the results (completed or attempted) and whether a developmental screening was performed. The Home Visit report reflects the data that has been entered in the Service Ledger of OunceNet.

### Home Visit Grid

The Home Visit Grid shows what days Home Visits occurred with participants. To do this it arranges 32 columns going across the page horizontally. The first column is a participant name, and the remaining columns each represent one day of the month. The report views one month at a time. For each participant and day the data shows if a Home Visit was scheduled for that day and the result of the Home Visit.

### Immunization History

The Immunization History report assembles a grid for each child showing his or her full immunization history and current immunization status. Each series of immunizations has a maximum amount of shots required.  The grid highlights in red any shots that are Overdue or due in the near future.

### Individual Contact Grid

The Individual Contact Grid shows which days Individual Contacts occurred with participants.  To do this it arranges 32 columns horizontally across the page. The first column is a participant name, and the rest each represent one day of the month. The report views one month at a time. For each participant and day the data set shows if an Individual Contact occurred that day.

### Intake

The Intake report lists complete intakes entered between the dates you select and all incomplete intakes entered at any time. The report displays the date of intake, participant name, age, component, Service Intensity Level, and the referral source grouped by intake type and staff.

### Level Analysis

The Level Analysis report displays the Service Intensity Level of each participant and lists the Home Visits expected, attempted and completed, grouped by staff member. Last, it lists a breakdown of Service Intensity Level totals by numbers and percentages.

### Maternal Efficacy Reading Results

This report displays how each participant answered the question “How often did you read to your child or tell your child a story?” on the Maternal Efficacy (Mother Baby) scale. The report lists the data by participant, date, child due date or date of birth, and answer. Data is categorized on the report by reading frequency.

### Parental Efficacy (Mother Baby) Detail

The Parental Efficacy Detail report lists the results for each Mother Baby scale of a participant by date, including both the total score and the individual scores of each scale item.  This allows staff to see how a participant’s total scores and answers to individual items have changed over time.  Participant scores are then averaged by staff member; the overall average of the agency is also displayed.

### Parental Efficacy (Mother Baby) Summary

The Parental Efficacy Summary lists the Mother Baby scales for each participant, including the date, total score, the participant’s self-rating for how good of a parent they feel they are, and whether or not risk is indicated.  Scores are averaged by participant, staff member and agency.

### Participant Activity

The Participant Activity report presents a list of services and their duration and result grouped by participant name and listed chronologically.  It also gives the same list totaled for each participant.

### Participant Enrollment History

The Participant Enrollment History report shows all records from the enrollment table for each participant who meets the date and program enrollment parameters, grouped by staff person. The report displays the Enrollment Status and date, the core component and the participant's Service Intensity Level.

### Participant List

The Participant List report displays the list of program participants, including the date of the first contact, the Service Intensity Level, the staff assigned, ethnicity and age.

### Participant Mailing Labels

The Participant Mailing Labels report uses the same list of participants as the Participant List report, but formats names and addresses to fit on address labels. Because it is designed to be printed directly onto label sheets, there is no heading displayed on this report.

### Participant Outcome Indicators

The Participant Outcome Indicators report is where information on all of the parent outcome indicators can be accessed in one place. The report lists the participants by their major outcome statuses as of the report's End Date, including birth control, education, employment, medical home, WIC, transience, service and birth plans, and parental efficacy. It breaks down outcome totals by status and also has a statistical breakdown for outcomes of all participants. The summary numbers of the last page correspond with those of the OunceNet Quarterly report. Since this report also breaks down the data by participant, it is useful for identifying missing or incorrect data.

### Pregnancy

The Pregnancy report lists pregnancies that occurred during the time period of the parameters and give each due date, current status, and trimester medical care began. The pregnancies are listed by the assigned staff person.

### Referral Statistics

The Referral Statistics report takes a list of referrals made by a specified program over a given period of time and counts them by category and by the agency to which they were referred. It distributes these numbers across months and quarters.

### Service

The Service report is similar to the Staff Activity report, but it groups the data by service type instead of by staff name. It also provides a summary at the end that groups by service type and shows the total services, duration and number served.

### Service Statistics

The Service Statistics report totals program services by service type, dividing them by month and quarter.

### Staff Activity
The Staff Activity report presents a list of services grouped by staff name and listed chronologically. It also gives the same list totaled for each staff person.

### Staffing
The Staffing report lists all names, hire date, termination date, and FTE breakdown for any staff enabled during the specified quarter. These numbers are also compared to the Program Staffing section of the subcontract.

### Tickler: Child Feeding
The Tickler: Child Feeding report lists which children in each staff member's caseload still need feeding information entered into OunceNet, listed by the first time point at which data is overdue. A second category of Pending lists those children who are not yet overdue, but will be due for data within 29 days of the report's End Date. The last section of the report lists children over 14 months old who are still in need of prior feeding information in order for their records to be complete.

### Tickler: Child Outcome Indicators
The Tickler: Child Outcome Indicators report lists which child outcome indicators are up to date and which are still needed for target children. These are listed by each staff member.

### Tickler: Developmental Screenings
The Tickler: Developmental Screenings report lists which children in each staff member's caseload are still in need of developmental screenings and how many are needed.

### Tickler: Missing Quarterly Data
The Tickler: Missing Quarterly Data report identifies missing or unknown data in a grid format; its purpose is to help programs prepare data for the OunceNet Quarterly report. Only participants with missing data will be listed. Any missing data will appear with an X in the pertinent column. Certain data points entered as Unknown during the intake process will have a U in the appropriate column. The Risk Factors in this report refer to the questions regarding the participant's mother and siblings asked during intake, and can be updated on the Intake Data page of OunceNet.

### Tickler: Participant Outcome Indicators
The Tickler: Participant Outcome Indicators report lists which Participant Outcome Indicators are overdue for each staff member.

### Time Spent During Home Visit
This report displays Home Visits by participant, date, location and duration. It then breaks down how time was spent during each Home Visit into the categories of Parent-Child Relationship, Child Health, Parent Health, Time Planning for Work, and Other.

### When Was Screening Performed

The When Was Screening Performed report lists FSC Assessment dates and how many days after the birth of the participant's child each screening was performed, or if the screening was performed prenatally. The bottom of the report shows the total number and percentage of screenings that were performed over two weeks after the child's birth. The key at the bottom of the report explains the abbreviated column headings.

### 30 Day, 60 Day, and 90 Day Inactive Service

The 30 Day, 60 Day, and 90 Day Inactive Service reports list any participants who are Active between the Start and End dates you choose but have not had any services in at least 30, 60 or 90 days respectively. The report lists the number of Days Inactive, the Last Service Date, and their most recent Enrollment Date and Service Intensity Level. These reports are very helpful for identifying participants who may have been unintentionally left on Active status rather than Closed or put on Creative Outreach.

## Administrative Reports

### CPS Quarterly

The CPS Quarterly report displays the aggregate information collected for CPS funding purposes such as the number of participants served, groups held, and referrals provided.

### DHS Child Outcomes

The DHS Child Outcomes report assembles data for children of Active participants turning either one or two years old during the specified quarter. The report lists the DHS standards for well child visits, immunizations, and developmental screenings and indicates whether the child is up to date or not. This report mirrors the information collected on the DHS Quarterly report.

### DHS Participant Education

The DHS Participant Education report lists the participants who are enrolled in or graduated from either high school or a GED Program during a specified quarter. This report mirrors information collected on the DHS Quarterly report.

### Doula Quarterly Doula Active

The Doula Quarterly report is a summary of Doula services provided during the quarter for all Active Doula participants. Active Doula participants are those who have received two or more prenatal Home Visits or one Doula Hospital Visit, or one FSW visit if they are also receiving FSW Home Visits. The report lists numbers for prenatal and postnatal Home Visits, prenatal groups, birth data and breastfeeding information.

### Doula Quarterly Summary Aggregate

The Doula Quarterly Summary Aggregate report is a summary of Doula Quarterly report information for all Active Doula participants across the state. It lists numbers and percentages totaled across all programs for Doula Home Visits, prenatal groups, birth data and feeding information.

## Doula Quarterly Summary Doula Active

The Doula Quarterly Summary Doula Active report is a summary of the Doula Quarterly report information for Active Doula participants, totaled for each quarter and the fiscal year. Active Doula participants are those who have received two or more prenatal Home Visits or one Doula Hospital Visit, or one FSW visit if they are also receiving FSW Home Visits. The report lists numbers and percentages for Doula Home Visits, prenatal groups, birth data and feeding information.

## HFI Quarterly

The HFI Quarterly report assembles HFI data such as enrollment, assessments, immunizations, well child visits and developmental screenings, and presents it following the requested HFI format.

## ISBE Program Record

The ISBE Program Record report assembles ISBE data on participant and child outcomes and presents it following the requested ISBE format.

## OunceNet Quarterly

The OunceNet Quarterly report is the report used to gauge program performance. It assembles program and statistical data in the requested OPF format. The report lists information such as how many staff were hired and terminated during the quarter, expectations for services compared to services attempted and delivered for all levels, Doula and group services, and outcome data. The numbers displayed include percentages, subtotals, and a category for missing data to identify where none was entered.

## OunceNet Quarterly Detail

The OunceNet Quarterly Detail report was formerly the OunceNet Quarterly report. It contains the information found in the current OunceNet Quarterly report as well as added data such as additional outcomes, staffing data, and demographics.

## OunceNet Quarterly Summary

The OunceNet Quarterly Summary report summarizes the data presented in the OunceNet Quarterly report and presents it in the requested OPF format. Data will show for all completed quarters of the fiscal year you select, and the Year to Date will display consolidated numbers for the year. Benchmarks are also included in this report.

# *Appendix*

# Glossary of Terms

**Assurance**: A contractual provision a subcontractor is obligated to satisfy in the course of OPF/PTS program operations.

**Community Education**: Services provided by the program to educate community members on pregnancy and parenting topics, including community events held by the program.

**Contract Compliance**: The conforming of an agency's performance with the OPF/PTS Subcontract boilerplate, the approved Program Narrative, the approved Budget, and amendments if they apply.

**Core Component**: The program model that determines the main services a program will provide. The three possible core components are Home Visiting, Doula Only, and Home Visiting/Doula combined. Infant Mental Health falls under the category of "other component" rather than core component.

**Direct Expenses**: Costs of delivering services to or performing activities on behalf of program participants that would no longer be incurred if the program closed.

**Doula Hospital Service**: Doula services that take place at a hospital. This often includes the birth of the child; however, if a birth does not take place the hospital service is still recorded. In addition, if a Doula provides support to the participant at the hospital before or after a birth but does not witness the birth, this is still considered an attended birth.

**Enrollment Status**: The role assigned to a participant that indicates the participant's level of involvement in a program. The three possible Enrollment Statuses are Creative Outreach, Active and Closed. Only those participants with an Active status are included in the OunceNet Quarterly reports. Participants must meet the following requirements for each status.

**Creative Outreach** (all must apply):

- The participant has received an initial contact <u>and</u> has signed a consent form. (All participants begin with Creative Outreach status).
- The participant is not yet Active, OR the participant was Active but has disengaged from program services.
- The participant has been pending on this status for less than three months. After three months the participant should be Closed if no visits have occurred.

**Active** (both must apply):

- The participant has completed the OunceNet intake process.
- The participant has received one FSW Home Visit by a Home Visitor, two Doula Home Visits by a Doula, or one Doula Hospital Service. To be

considered Active in Doula services, the participant must receive two <u>prenatal</u> Home Visits.

**Closed** (one must apply):

- The participant has been pending in Creative Outreach status for three months without receiving the Home Visit required to achieve Active status. A participant who shows obvious disinterest to intensive outreach efforts from staff may be closed before three months.
- The participant has graduated from or completed the program according to the program's guidelines.
- Any other applicable reason for closure, such as moving away.

**Full Time Equivalency (FTE)**: The time assigned to OPF/PTS activities represented as a proportion of the Agency's standard workweek. For example, 1FTE is the equivalent of one full time employee, and .5FTE is the equivalent of one half-time employee.

**Group Service**: Groups provided by the program and conducted by a staff member in which participants learn about pregnancy and parenting issues.

**Home Visits**: The services provided by OPF/PTS staff for pregnant and parenting teens and their children. Home Visits take place in the participant's home on a schedule determined in partnership with the family, and include time for parent-child activities. A service provided by a Home Visitor outside of the home may still be considered a Home Visit if it contains the same length and content as a Home Visit; however, 80% of Home Visits must occur within the home.

- **Attempted Home Visit**: A scheduled Home Visit which the staff member made an active effort to complete but did not take place. Attempted visits include those in which the staff member went to the participant's home at the scheduled time to find the participant absent or unable to attend, but do not include those cancelled in advance by the participant or staff member.
- **Doula Home Visit**: A Home Visit with Doula services conducted by a Doula.

**Homeless**: Lacking a fixed, regular and adequate nighttime residence. This includes those who are "doubled up," a term that refers to a situation where individuals are unable to maintain their housing situation and are forced to stay with a series of friends and/or extended family members. Those who qualify as homeless may also stay at the following places:

- A supervised publicly or privately operated shelter designed to provide temporary living accommodations.
- An institution that provides a temporary residence for individuals intended to be institutionalized.
- A public or private place not designed for, or ordinarily used, as a sleeping accommodation.

**Individual Contact**: A pregnant and parenting service provided individually to a participant that falls within the categories of crisis intervention, counseling, health care or advocacy, but that is not part of a Home Visit or Doula Home Visit.  This service may take place via a letter, phone call, or face-to-face contact.

**In-Kind Support**: The financial equivalent of services provided by volunteers or assets donated to support program activities.

**Intake**: The entry documentation completed upon a participant's initial contact with the program.  An intake must be completed to count a participant's data toward program outcomes.

- **Group Roster Only Intake**: The intake for participants attending only group services.  Data of participants enrolled in this category is not counted toward program outcomes.
- **Doula Only Intake**: The intake for participants who receive only Doula services.

**Long Term:** The full range of Home Visiting program services provided to a participant on an ongoing basis.  Long-term services are meant to include the intensity, duration and frequency of Home Visit services needed to achieve optimum results for participants.

**Medical Home:**  A participant and child's routine place of medical care wherein the participant's medical chart is located.

**OunceNet**: The web-based OPF/PTS Management Information System (MIS) used for program evaluation and funding purposes.

**Participant Service Plan**: A written plan to be negotiated with each pregnant and parenting teen that includes the following elements: identification of goals, resources and a course of action for achieving the goals.

**Quarterly Reports**: The reports delivered to OPF/PTS within thirty days of the completion of each calendar quarter that identify the progress a PTS program made toward achieving contract goals.  The four quarters of the fiscal year are as follows:

- Quarter 1— July 1 to September 30
- Quarter 2— October 1 to December 31
- Quarter 3— January 1 to March 31
- Quarter 4— April 1 to June 30

**Referral**: Services that direct a participant to another program within the same program or externally that will meet the participant's needs.

**Screening**: The process of testing a child's development on certain indicators using a standard instrument such as the Denver II, Brigance, Ages and Stages, or Batelle Developmental Inventory Screening.

- **Re-screen**: The process of repeating a screen that was already performed on the same child.  This generally occurs when the child's first score indicated the need for additional screening.  A screening qualifies as a re-screen only if the same portion of a screen is repeated on the child. For example, it does not qualify as a re-screen if one portion of the Denver II is performed on 7/1/04 and a different portion of the Denver II is performed on the same child on 7/2/04.

**Service Area**: The geographic area of current and/or proposed programming for pregnant and parenting teens, as defined by the service organization. In Chicago the service area is generally defined by the community area, while in the rest of the state the service area is usually defined by county.

**Service Intensity Level**: The frequency level of the Home Visiting services provided to the participant. The Service Intensity Levels of non-Doula participants are:

- **Level X** – for all Creative Outreach participants. Creative Outreach participants are those who have not yet achieved Active status by receiving one FSW Home Visit, two Doula Home Visits, or one Doula Hospital Service.
- **Level 1P** – for participants receiving prenatal services
- **Level 1** – for participants receiving weekly Home Visiting
- **Level 2** – for participants receiving biweekly Home Visiting
- **Level 3** – for participants receiving monthly Home Visiting
- **Level 4** – for participants receiving quarterly Home Visiting

All Active Doula participants are assigned to the **Doula Home Visiting Model** service level rather than the levels above.

**Short Term Participants**: Participants targeted for short term or a single service component and not expected to be involved in long term Home Visiting within the PTS program.

**Staff Assignment**: The assignment of the primary person responsible for a participant. This is not always the same staff person who completes the intake. If the staff assignment is not known during the OunceNet intake process, the field of Staff Assignment should be left blank until a staff person is assigned. A participant may be assigned to more than one staff person; for instance, one staff person may provide FSW services and another may provide Doula services.

**Staff Meeting/Team Meeting**: Regularly scheduled meeting held to address agency, team, community, administrative, or other issues related to the PTS program.

**Staffing**: Regular meeting held with direct and supervisory staff to discuss services/issues related to a particular participant’s status/progress.

**Supervision**: The relationship and interaction between an employee and his or her direct supervisor. OPF believes it is optimal that this relationship seek to ensure quality direct services and support the professional development of staff. The elements include reflection (listening and explaining), collaboration (mutual respect), and regularity (how often, time, structure, and availability).

**Well Child Visit**: A doctor's visit that includes preventive pediatric care for the child. Preventive pediatric care includes procedures such as medical history, measurement (such as height, weight, blood pressure), sensory screening (vision and hearing), developmental/behavioral assessment, physical examination, immunizations and screenings, anticipatory guidance (such as injury prevention and nutrition counseling), and dental referral.  It may also include addressing the parent/child relationship and other psychosocial aspects of development.