ST. LUCIE COUNTY
Children's
SERVICES COUNCIL
Our Children • Our Community • Our Future

2021-2022

the hub

USER TRAINING MANUAL

DELIVERY -AGGREGATE ENTRY

Table of Contents

Aggregate Data Collection 2

Demographic Data 2

Entering Group Activity/Services 4

Aggregate Outcomes 6

Written Commentary/Success Stories 8

AGENCIES TAB 9

Agency Details 9

Insurance and Audit Information 9

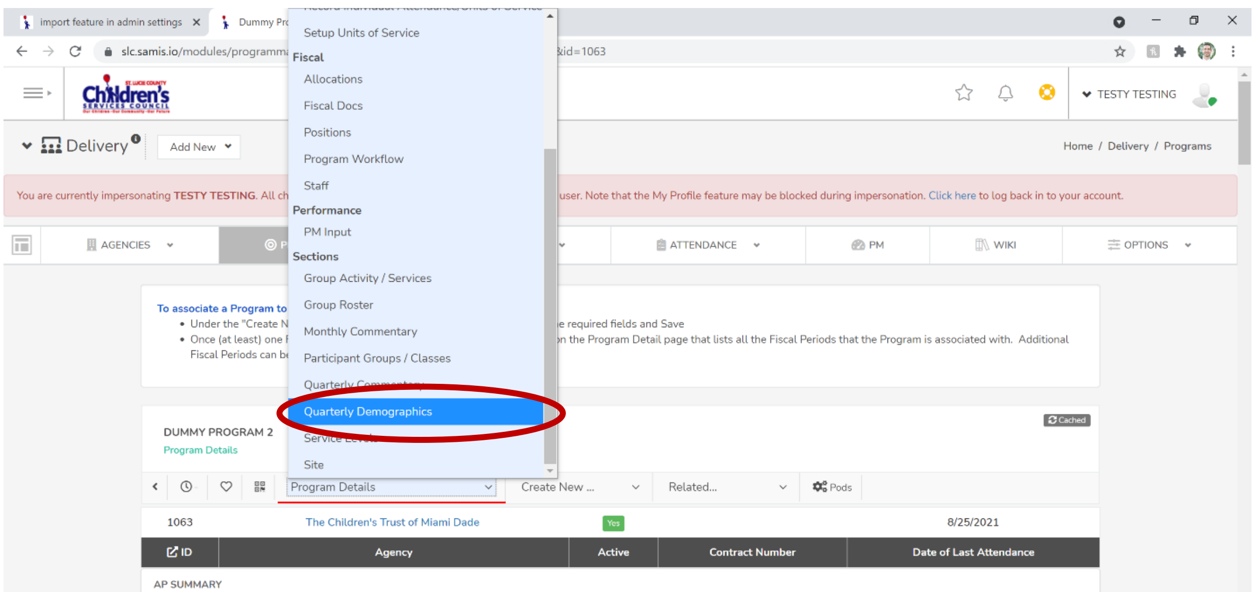
Aggregate Data Collection

While we prefer and encourage all Children's Services Council funded programs to use the system to its fullest capacity by utilizing the client management component (individual client entry), we recognize that some of our funded programs already have robust client management systems. It is not the Children's Services Council's intent to have providers input data twice. In the upcoming year, we will strive to find ways to have existing client management systems "talk" to The Hub in order to make data entry seamless. In the meantime, programs have the option to input both client demographics and outcome information in the aggregate format.

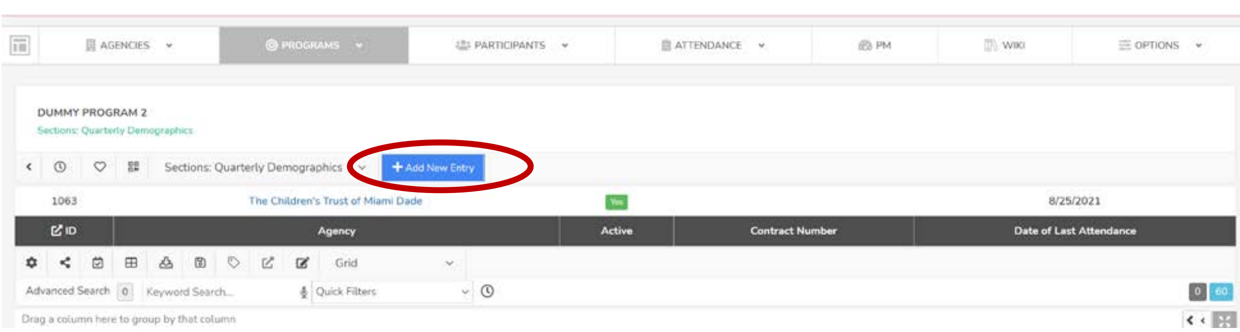
There are two options to provide quarterly aggregate demographic information. First option is for the programs to input aggregate client information by zip code, similar to completing the Excel spreadsheet.

Demographic Data

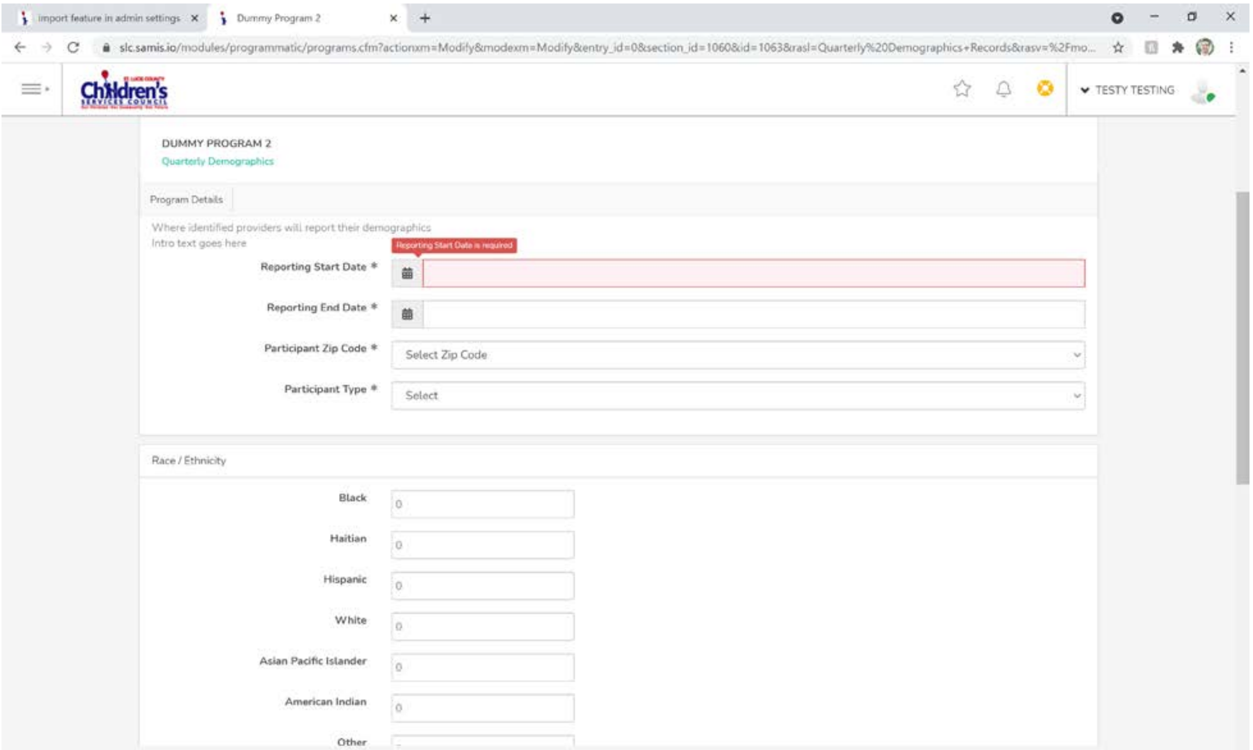
To access the **Quarterly Demographic** information, simply navigate to the Program Tab and click on the drop down menu (titled "Create New") and click Quarterly Demographics (shown below).

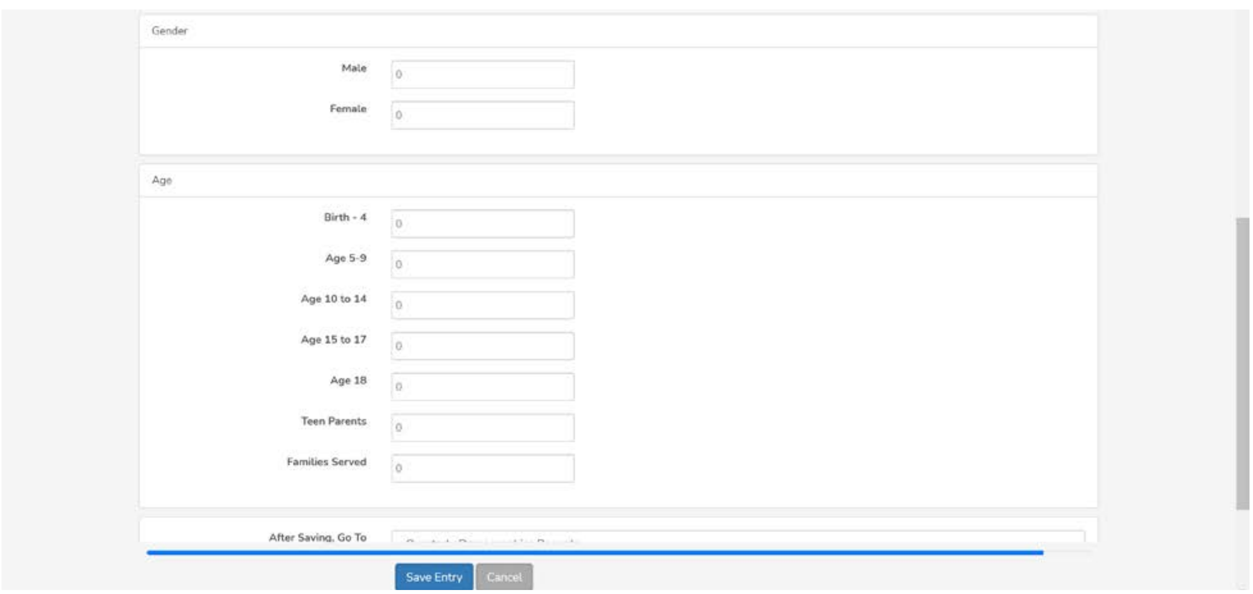


Once the Quarterly Demographics link is selected the following screen will display. It will display any quarterly information that has already been entered (if applicable). Click on the blue rectangle that says "+ Add New Entry".



Complete the demographic information for each zip code your program has clients – similar to the quarterly Excel sheet. **Important** – select the Reporting Start Date and Reporting End Date that corresponds with the data – for example if the user is reporting quarterly, select time frame from Oct. 1st thru Dec. 31st for Quarter 1, Jan 1st – Mar 31st for Quarter 2, April 1st – June 30th for Quarter 3, and July 1st – Sept 30th for Quarter 4.

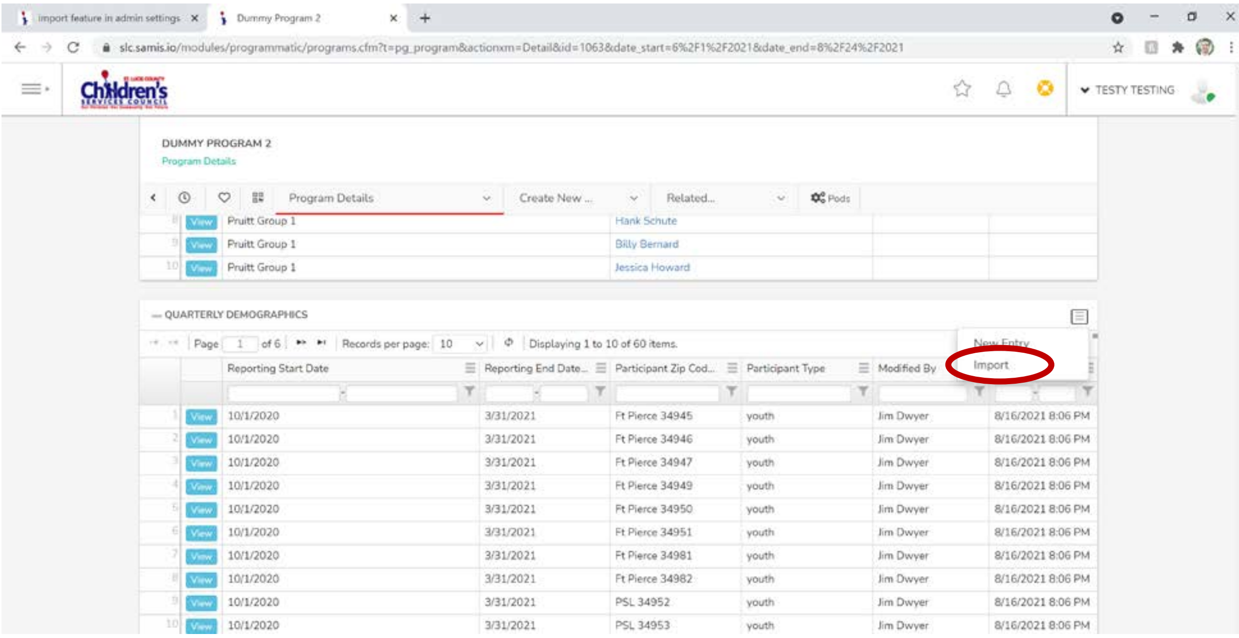




After completing the corresponding Zip Code, click “Save Entry”. Repeat for each zip code that the program is serving clients. Again, this is the same info that was collected in the Excel sheet programs reported on in the past.

For those that prefer to load data via the MS Excel sheets, or if your current system is easily able to export into the Excel format, there is an import option. The Children's Services Council will not import or accept Excel sheets from programs; however the program can import the excel sheet themselves. The Children's Services Council team will provide those programs that choose this method with a template to complete and import as follows.

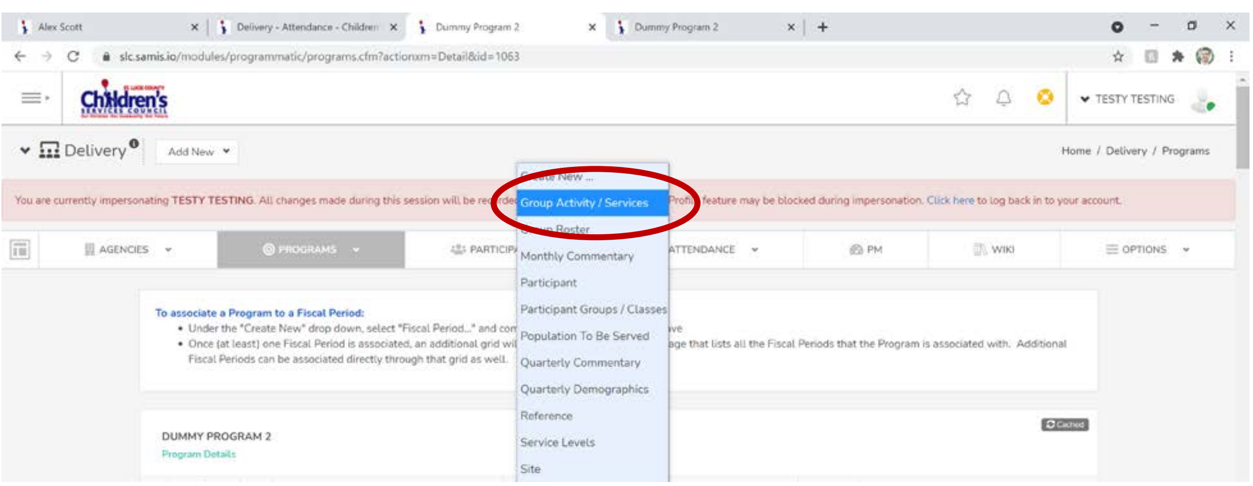
From the Program tab, navigate toward the bottom of the program details page to the Quarterly Demographics dashboard, and click the hamburger (three lines) in the right-hand corner and select "Import".



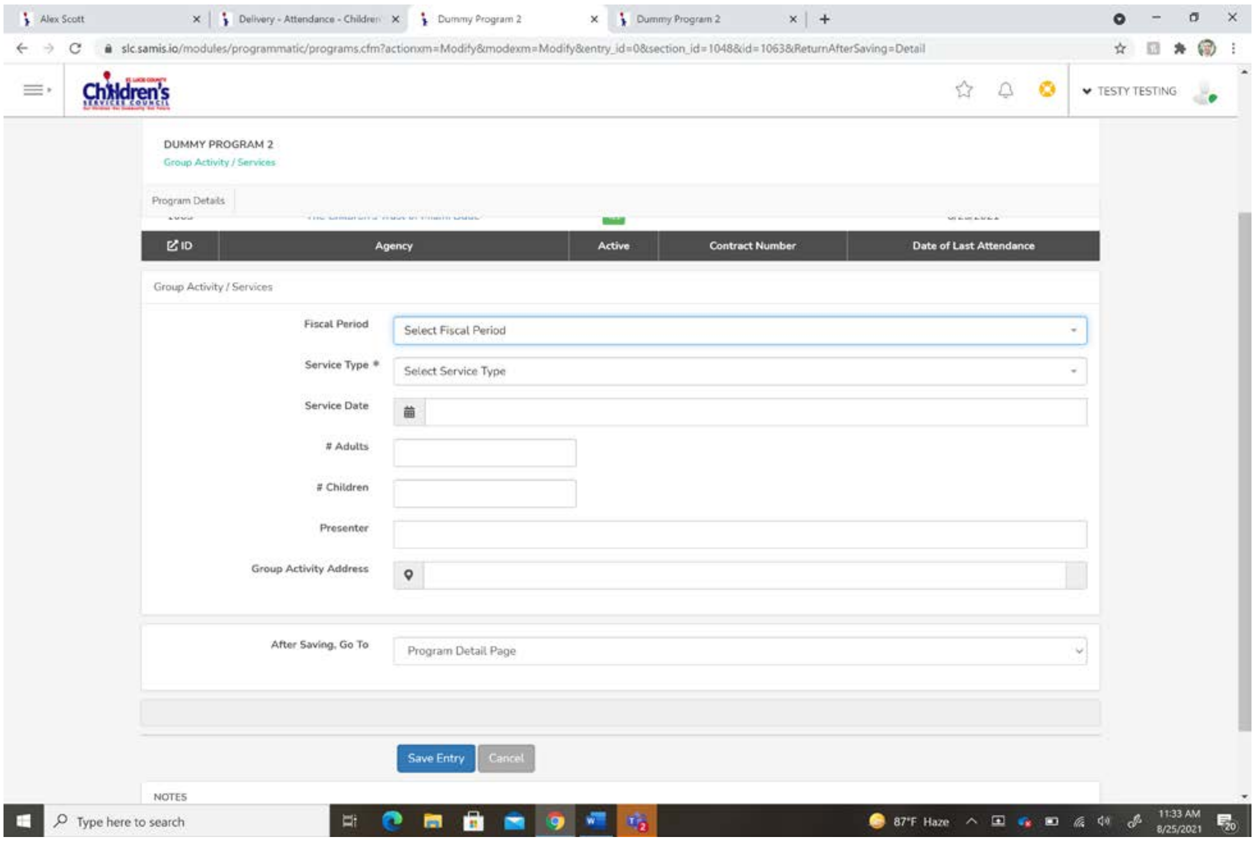
Once Import is selected, the following screen will appear. The user will then click on "Choose File" to attach the Excel sheet and then click the blue "Upload File" rectangle.

Entering Group Activity/Services

For some programs, services are not always delivered individually but in groups. When a program offers services to groups and is unable to collect all the individual client information, the service will be logged into the system by going to the Programs tab. Once the user has gone to the Program Details page of the corresponding program, click on "Create New" and select "**Group Activity/Services"** from the drop-down menu.

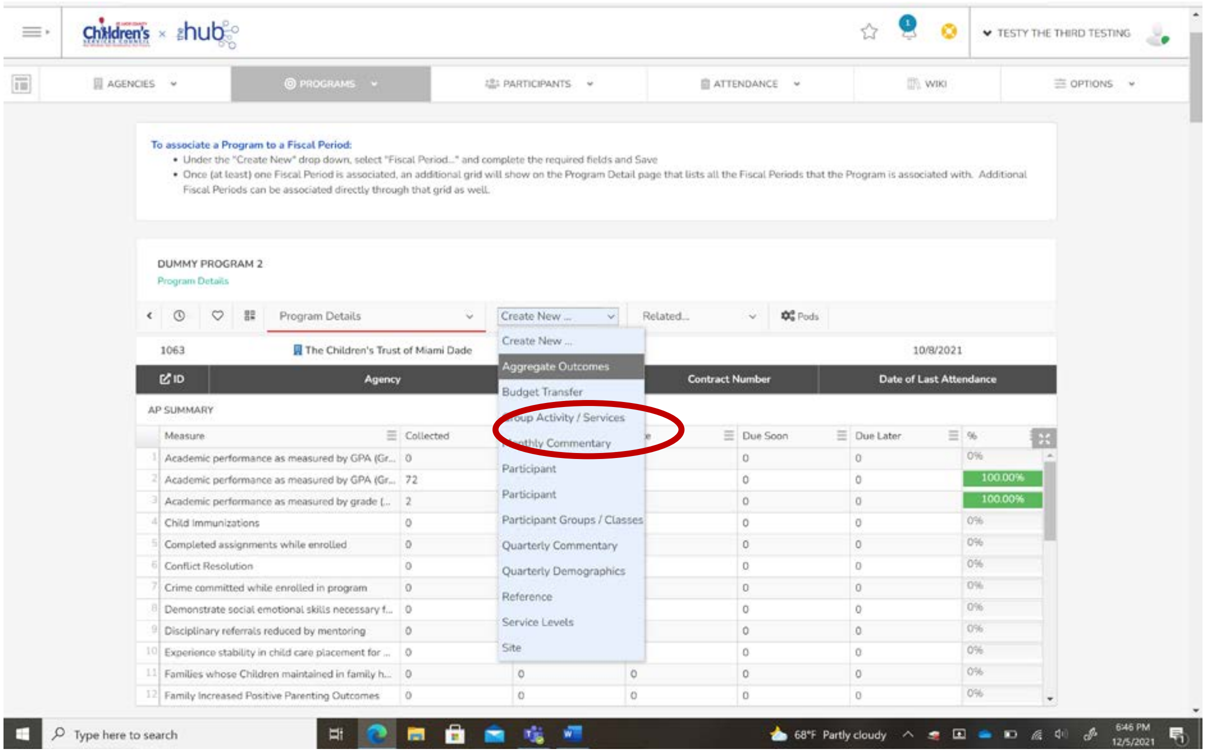


Once selected, users will be taken to the following screen. Simply select the current fiscal year and service provided from drop down list. Select Services Date for the single session Group Activity being entered or the beginning date for the series of sessions. Enter in the number of children (or adults) that were in the group and the location of the group service. The address will start to self-populate with local addresses as user begins to enter. Add narrative to the Note field for relevant information on that session, such as special target population, number of planned sessions, pre- or post- survey/test comments. Once done, click “Save Entry”. You can come back to this entry in the future and use the modify link to add further notes on the group activity/progress. Click “Save Entry” after each added note.

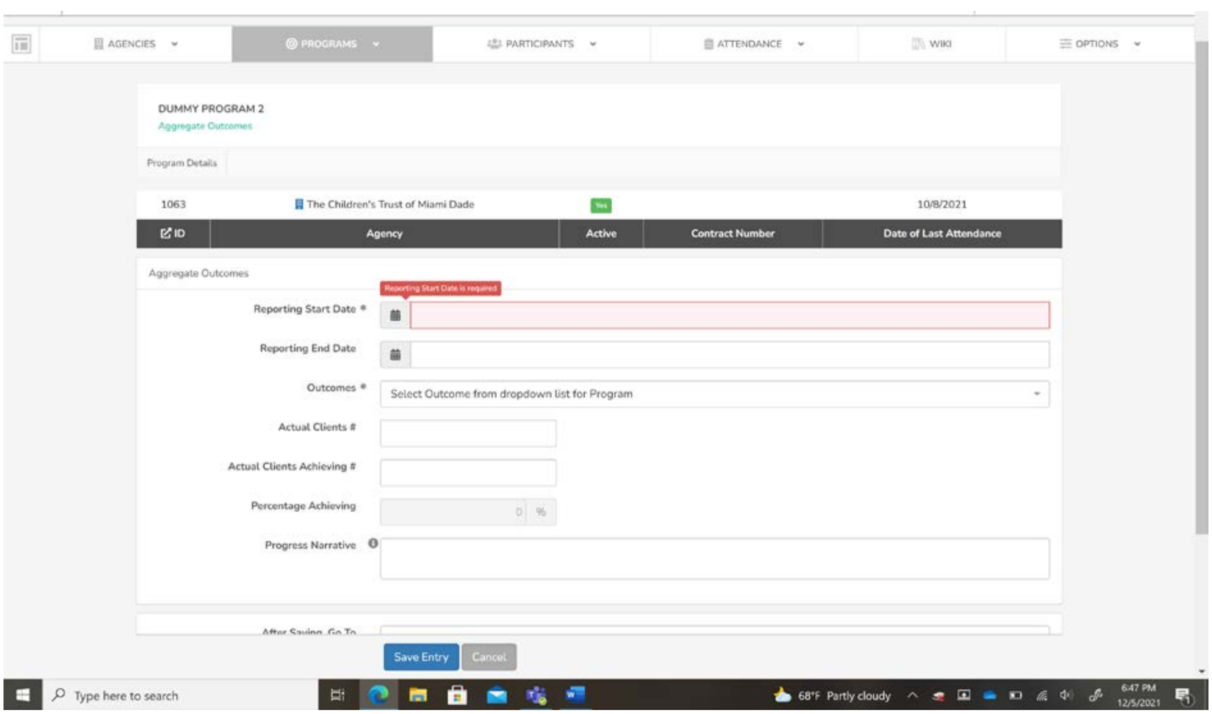


Aggregate Outcomes

To access the Aggregate Outcomes information, simply navigate to the Programs Tab (in the delivery module) and click on the drop-down menu (titled "Create New") and click "Aggregate Outcomes".



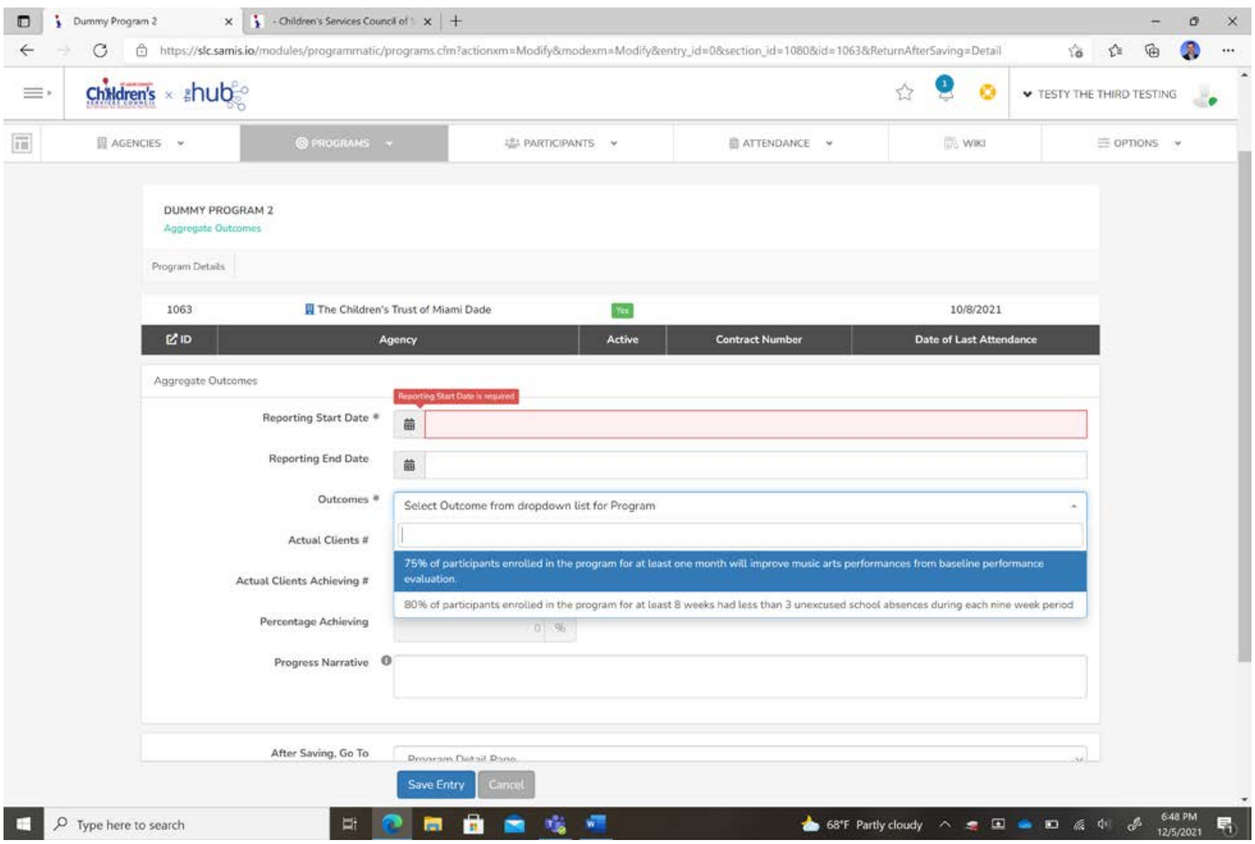
Once the Aggregate Outcomes link is selected the following screen will display.



The fields with "*" are required. For Reporting Start Date and Reporting End Date, select the date range that these outcomes cover. For example, if it's the first quarter, select October 1st as start date and December 31st as end date. If the program is reporting outcomes more frequently then quarterly, modify the date range for the time period being captured.

For "Outcomes" click on the field. There will be a drop down listing the Children's Services Council contracted outcomes. Select which outcome you are reporting. For "Actual Clients", please enter the number of clients that are eligible for this outcome. In the "Actual Clients Achieving #" field, enter the number of clients that achieved the outcome from the "Actual Clients #" total. For example, if a program has 50 youth that qualify to be measured by this outcome and 45 achieved the outcome that reporting period, the program will enter 50 for "Actual Clients #" and 45 for "Actual Clients Achieving #". The field "Percentage Achieving" will be automatically calculated based on the numbers entered in the above fields.

The "Progress Narrative" field allows you to add any explanation or commentary on the outcome just reported.

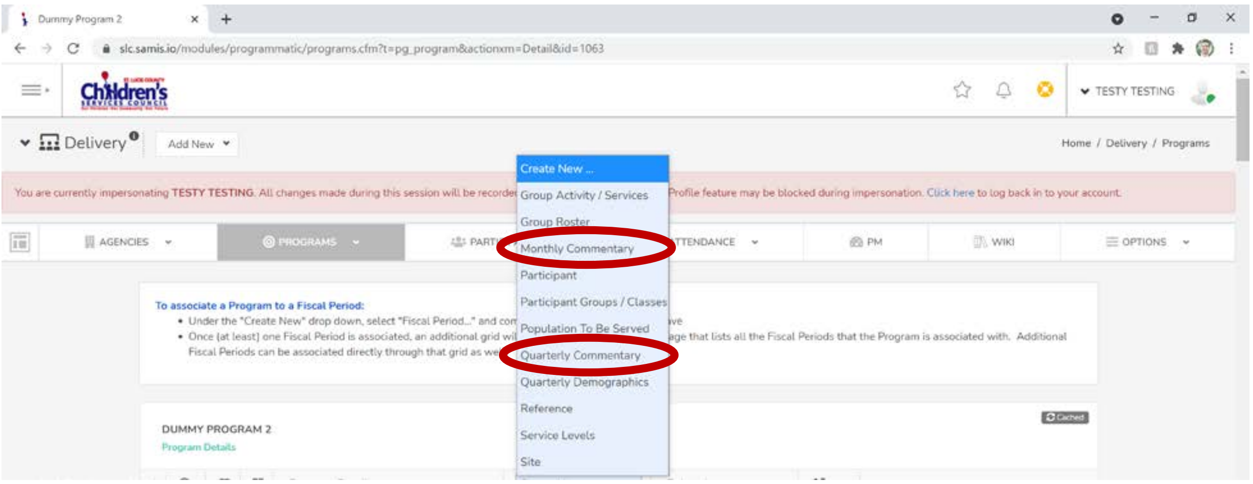


When completed with the outcome, click "Save Entry". Please repeat the above steps for all the contracted outcomes for your program.

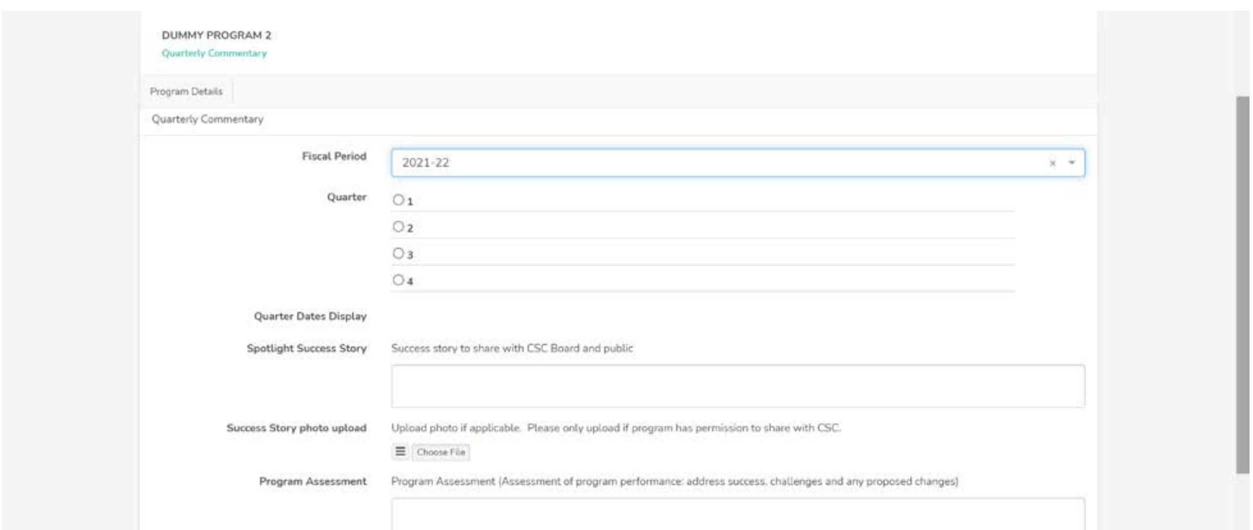
*****Aggregate Outcomes need to be entered at least quarterly and each quarterly (or more frequent) entry should report the results of the quarter or time period, not cumulative for the year.**

Written Commentary/Success Stories

The PROGRAMS tab is also where users can provide written commentary on their program's performance as well as provide a success story. Success stories are always encouraged because they are shared with the Children's Services Council board. This can be done either monthly or quarterly by selecting Create New and selecting the below option(s):



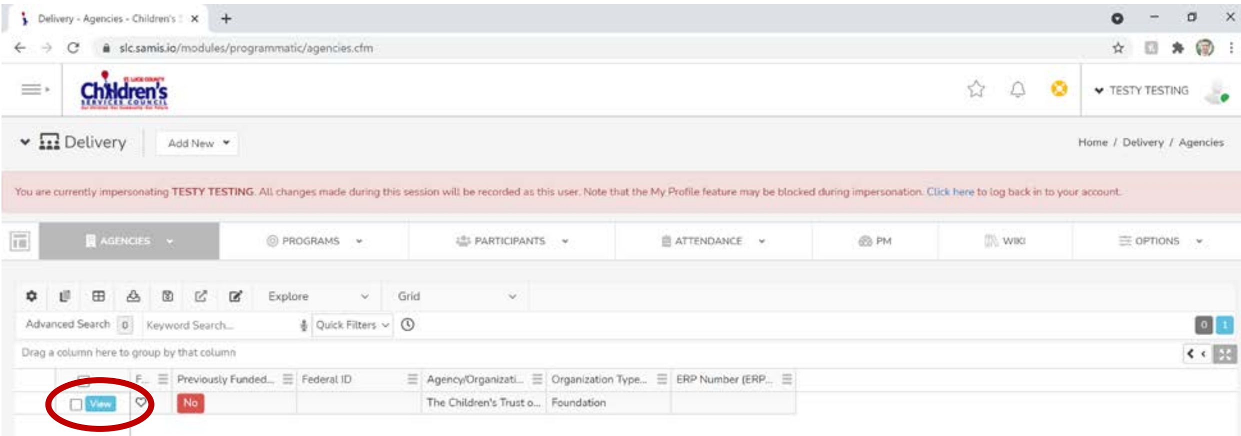
Once selected the following page appears for users to submit their narrative on their budget, assessments, performance measures and success stories. Be sure to click Save Entry.



Below is a reminder on how to upload Audit and Insurance information:

AGENCIES TAB

By clicking on the Agencies tab, users will be taken to the following screen where your Agency's name will appear. Click on "View".



Agency Details

After selecting View – your Agency Details will appear. The details include a summary of all the clients being served across all your programs, your agency's contacts, and your programs. For any graphic image, if you click the hamburger (three lines) in the corner, you will have options to change the graphic or download.

Insurance and Audit Information

The Agencies tab is also where providers will upload their Insurance and Audit information. Simply click on "Create New" and a drop-down box will appear – click on either "Audit" or "Insurance" and new screen will appear for you to upload the appropriate document.