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Introduction to IMPACT

The IMPACT User Guide will walk you through the main functionality of the IMPACT System. You may review the guide in its entirety or visit different sections of the guide as you access that part of the application.

As an IMPACT user, you will most likely fall into one of three groups:

- State Authorities
- Regional Managers
- Grant or Contract Recipients (Service Providers)

Depending on your user role and permissions, you will have access to various parts of the IMPACT system. In addition, you may have the ability to view, create, update, and/or delete certain pieces of information.

What is IMPACT?

IMPACT has been developed based upon the collective knowledge and experience of individuals delivering data collection and management solutions to States, Counties, Cities, and substance abuse prevention providers for over 14 years. MOSAIX has combined this domain knowledge and experience with technology solutions developed by software and data engineers utilizing truly state of the art techniques to deliver systems that satisfy the needs of customers.

We know that managing grants is a complex process. Among the many issues that arise we find that they usually fall into one of the following categories:

- Financial management and reporting
- Compliance & monitoring of grant requirements
- Progress reporting of grant recipients and sub recipients
- Evaluation of performance
- Organization-wide Data Collection for Grant Management

In order to be an effective management tool, IMPACT has been designed to approach grants management from the perspective of all three groups. State authorities and regional managers find the compliance & monitoring and financial management aspects of IMPACT particularly useful. Service Providers use IMPACT to plan and manage their efforts as well as rely on the many progress reporting capabilities of the system.

IMPACT was created with the understanding that grants management is an organizationally driven process. After all, organizations receive and manage multiple grants simultaneously. While the reporting requirements may vary, there are some fundamental functions that are needed across the organization. Working closely with clients through this process, allows MOSAIX to configure IMPACT to an organization’s workflow. The remainder of this document will focus on the application of IMPACT for
the management of grants by those organizations involved with the management of substance abuse prevention.

IMPACT provides options as to how the State can configure IMPACT to manage Provider’s grant programs. Since each state can change the terminology for their implementation, this guide will not address those changes, and will utilize the generic Model IMPACT.

IMPACT SAPT follows the Strategic Prevention Framework, otherwise known as the SPF. This guide will follow a similar flow. Each section of this guide walks you through a different section of IMPACT. Five sections are outlined in this document:

- Assess
- Plan
- Implement
- Capacity
- Reports
Section 1 - Assess

You will find the following three modules under the ASSESS section:

- Data Sources
- Identify Problem Behavior
- My Needs Assessment

What is Data Sources?
Data Sources allows authorized users the ability to access a number of different data sources that have been identified as relevant to your organization. These reference materials will be of most help in the preparation for conducting your needs assessment.

Accessing Data Sources
Each Data Source will contain a Title and Short Description. In order to review a Data Source, simply click on the Data Source Title. If the Data Source is a web page, the web page will open up in a new window. If the Data Source is a document, the document will download and open once you click on the document title. If the Data Source is a document, an icon will appear next to the title.

KEY POINTS:
- Provides access to your Data Library
- The library may contain PDF, Word, or Excel documents.
- The library may contain links to web pages.
What is Problem Behavior?
A Problem Behavior is the issue or behavior that you have identified as the target of both your planning and service efforts. Sometimes, Problem Behaviors are referred to as Priorities. Typically, a Problem Behavior or Problem Behaviors are identified as a result of the Needs Assessment. An example of a Problem Behavior is Underage Drinking, Binge Drinking, Obesity, or Teenage Pregnancy. It is the overarching problem that you are trying to solve. In IMPACT, you can identify multiple Problem Behaviors.

Identifying Problem Behavior(s)
Identify Problem Behavior allows you to create, update, delete, and view problem behaviors. You should add at least one Problem Behavior before you create your Needs Assessment. Your Problem Behaviors will also be used in Logic Model and Goals.

To add a Problem Behavior, simply record a Problem Behavior Title and set the Problem Behavior to Active. If at any time you need to stop focusing on a particular Problem Behavior, you may set the status to Inactive. You will no longer be able to select that Problem Behavior for use in the system once the status has been changed.

KEY POINTS:
- Problem Behaviors can be added to the list by any Organization
- Can be specified by any Managing Organization; including a State
- Used in My Needs Assessment, Logic Model, and Goals
About My Needs Assessment

My Needs Assessment allows you to enter key information from your needs assessment as well as upload a copy of your entire Needs Assessment document. You may create, update, delete, and view Needs Assessment records in this section. The Needs Assessment should drive your whole planning process. Starting with your Problem Behavior, the Needs Assessment identifies the areas and populations for which you should focus your efforts.

This Problem Behavior is critical for linking your Needs Assessment to the Goals you declare in the Identify Goals section. You will then be able to relate those Goals to the programs and services utilized in your operations with a needs assessment. Your Programs and Services will be linked to Objectives. Objectives are linked to Goals. Goals are linked to Problem Behaviors. So when you specify a Problem Behavior in your Needs Assessment, we can then link that Needs Assessment to your Programs and Services.

Entering My Needs Assessment

IMPACT allows you to enter one or many Needs Assessments. You may create one Needs Assessment for all of your efforts or you may need to create a separate Needs Assessment for each Grant from which you have received funding (i.e. Block Grant, Partnerships for Success, Suicide Prevention, etc.)

KEY POINTS:

- Identifies one or many Problem Behaviors
- Problem Behaviors are linked to Goals
- Goals are linked to Objectives
- Objectives are linked to Programs and Services
The Assessment Title allows you to distinguish between the various Needs Assessments that you may enter. The Assessment Period also allows you to specify the dates for which the Assessment will cover. For example, a Needs Assessment may cover your State Fiscal year or a Federal Fiscal year. It could even cover multiple years. The Date Collected is the date of which the data that you used to conduct your Needs Assessment was collected. For instance, you may have used data that is a year or two old because that is all that is available to you.

A number of other data fields are collected in My Needs Assessment. Please keep in mind that any fields marked with an asterisk (*) are required in the system. The Expert Help provide some additional definitions and guidance.
Section 2 – PLAN
Section 2 - Plan

You will find the following nine modules under the PLAN section:

- Identify Goals
- Identify Objectives
- Identify Programs
- Identify Activities
- Identify Participants
- Identify Groups
- Manage Strategic Plans
- Manage Logic Models
- Manage Work Plans

What is a Goal?
First, a Goal as used in IMPACT describes a desired change in behavior such as “Decrease marijuana use by individuals aged 14-18”. You should think of the Goal as the top of your planning structure. A Goal will contain one or more Objectives that you will attempt to achieve through your organization’s efforts.

Identifying Goals
Goals are usually described in a Strategic Plan. You will provide a title for the goal and also specify a beginning date, a Long-Term or Goal Outcome and a target date for achievement of the goal. If you are using MANAGE STRATEGIC PLANS you can associate a Goal to a Strategic Plan. You can optionally identify Long Term Progress Indicators that you can use to measure your progress at certain reporting points. You should think of the Goal as the top of your planning structure. A Goal will contain one or more Objectives that you will attempt to achieve through your organization’s efforts.
If you use the Work Plan then the goals you define in IDENTIFY GOALS will be available for section in the Work Plan.

**KEY POINTS:**
- In IMPACT, a Goal is the top of the Planning Structure
- Goals are linked to Problem Behaviors
- Goals can be associated with Strategic Plans
- A Goal Outcome and Target Date for Achievement can be specified for each Goal
- Progress Indicators can be specified for each Goal
- Goals can be linked to multiple Objectives
- Goals can be added to Work Plans
What is an Objective?

**Objective** refers to desired changes in factors that are highly correlated with a problem behavior. In general, objectives are more specific and easier to measure than goals.

**FIGURE 2 - OBJECTIVES WORKFLOW**

![Objectives Workflow Diagram]

**KEY POINTS:**
- Each Objective is linked to a Goal
- Each Objective can be associated with one or more Programs
- Objectives have beginning and target achievement dates
- Objective Outcomes can be specified to measure progress towards the Objective
- Objectives can be added to Work Plans
- You can create Objectives or have Objectives assigned to you by the Organization which manages your Organization

**IDENTIFYING OBJECTIVES**

You will provide a title for each Objective and select the Problem Behavior to which this Objective relates. In the **IDENTIFY PROGRAMS** component you will be able to assign any Objective you created in this section to one or more Programs. After specifying the title and problem behavior, you will enter the beginning and target achievement dates for this Objective. Next, you can specify one or more Objective Outcomes that you will use to measure progress towards the Objective and the date you intend to complete the Objective. A common usage model would be to establish outcomes that measure progress over time towards completion of the objective. So you might set Objective Outcome measurement dates at the end of each year with a final Objective Outcome for the Objective on the date you are projecting to satisfy this objective.
Optionally, Objectives can be assigned to one or more organizations by their Managing Organization. When those organizations create Programs they will be able to associate those Programs with the Objectives which are assigned to them.

What is a Program?
A Program is a planned course of action that is focused on outcomes to objectives defined in your organization. Programs can be established in accordance with one of the science based initiatives such as Evidenced Based Programs or Environmental Strategies. They can also be based upon your own designs (Local/Innovative).
Turning back to programs, you should recognize that you can use more than one Program to help you achieve your objectives. The key is to recognize that you can use many Programs to achieve your Objective and that those Programs might be used to achieve other Objectives as well. So one Program can support many objectives and one Objective can utilize many programs.

**KEY POINTS:**

- Programs are grouped by Program Type and identified by a Unique Name (i.e. Too Good For Drugs Fall Session)
- Program Types include Evidence-based, Environmental Strategy, and Local/Innovative
- Programs can be associated with one or more Objectives
- Programs can be associated with a CSAP Strategy and Service Type Code
- Program Outcomes can be specified to measure progress
- Programs can be added to Work Plans
- Completed or Discontinued Programs can be set to Inactive

**IDENTIFYING PROGRAMS**

You will use this option to add Programs to IMPACT. First you will select the Program Type (Evidenced Based Program, Environmental Strategy, or Local/Innovative) from the dropdown at the top of the page. If you selected Evidenced Based Program or Environmental Strategy then you will select one of the defined programs for the Program Type selected from the drop down. IMPACT will copy the name of the Evidenced Based Program or Environmental Strategy into Program Title. You can keep the title IMPACT copied or you can provide a unique title for your Program.

You should be aware that you can only use a Program Title once within an Organization. Since IMPACT is designed as a multi-year data collection and management system, you should consider at a minimum adding a modifier to the supplied title. Following this guidance will permit you to reuse the Evidenced Based Program or Environmental Strategy again for a different Program. Remember, those programs and strategies are simply models or templates that have a proven scientific basis. When you create a Program you are using that program or strategy in order to define an effort, focused on a specific community, using a certain source of funding. We think you should be able to reuse a model or template again to build an effort potentially focused on a different community or using different sources of funding. IMPACT does not require that you follow this guidance, however this usage model is available if you choose.

Next, you will provide a description for your Program and then record the start and target completion dates for your program. You will continue by selecting one or more Objectives from a drop down of Objectives in the list you created in IDENTIFY OBJECTIVES. Remember you can specify that more than one Objective will be supported through the efforts of the Program you are creating. If an organization that manages your organization has assigned Objectives to you, then you will see those objectives along with the Objectives you created yourself.
After recording the Objective(s) you can specify which CSAP Strategy this program will address and select the Service Type Code appropriate to the planned service. IMPACT will display the subset of Service Type Codes based upon the CSAP Strategy you selected.

If you are entering a new Program then you should set the status to Active. When the Program is completed or discontinued you should set the status to Inactive and provide the date completed or discontinued.

Next, you can optionally specify one or more Program Outcomes that you will use to measure success of the Program. If you employ Activities this would not be used since you can specify individual progress and outcome indicators for each activity.

Below is a visual depiction of a Program implementation. You can see that you have three objectives and have created three programs to help you achieve those objectives. This table explains the relationships between you programs and objectives. You can see that each Program has two interim progress measurements and a final program outcome established.
FIGURE 3 - PROGRAM IMPLEMENTATION

OBJECTIVE 1

PROGRAM A

PROGRAM A BUDGET

Program Progress Indicator 1

Program Progress Indicator 2

Program Outcome

Target Date

Measurement Date

Measurement Date

OBJECTIVE 2

PROGRAM B

PROGRAM B BUDGET

Program Progress Indicator 1

Program Progress Indicator 2

Program Outcome

Target Date

Measurement Date

Measurement Date

OBJECTIVE 3

PROGRAM C

PROGRAM C BUDGET

Program Progress Indicator 1

Program Progress Indicator 2

Program Outcome

Target Date

Measurement Date

Measurement Date
EXHIBIT 1 - OBJECTIVE PROGRAM EXAMPLE

| Objective 1 is supported by Program A |
| Objective 2 is supported by Programs A, B, and C |
| Objective 3 is supported by Program C |
| Program A supports Objective 1 and Objective 2 |
| Program B supports Objective 2 |
| Program C supports Objective 2 and Objective 3 |
What is an Activity?
Activities are planned events that you intend to pursue to help you achieve the outcomes you specified for your named Objective. Activities are grouped together under a Program. Activities have defined begin and end dates and identify responsible parties. They usually have process indicators that describe how this activity’s success will be measured. Finally, the results or outputs of the Activity are defined.

KEY POINTS:
- Activities can be specified for Programs
- Activities have beginning and end dates
- A Service Type Code can be assigned to the Activity along with the Responsible Party
- Process Indicators can be specified for an Activity

IDENTIFY ACTIVITIES
You will use this option to add Activities for previously specified Programs. First, you will select the Program to which this Activity applies. Next, you will provide a name/description for the Activity. You will then specify a date range that establishes the beginning and ending dates for the Activity.

If you are providing Activities for a Program that is not derived from an Evidenced Based Program or an Environmental Strategy, you should consider that efforts of the Program may not be reported in the standard block grant report. To ensure that you capture these Activities in your reports, you can specify
a Service Type Code that closely corresponds to the Activity. You may want to consider establishing specific Service Type Codes that can be used for Programs based upon Local/Innovative program types.

Finally, additional details for the Activity including the responsible party, any process indicators that you’d like to measure, and any outputs that will be collected for the activity can be specified. Outputs are factors that are focused on achieving specified outcomes in the Program. They should be specified in a manner that can be quantified and measured within a time frame.
What is a Strategic Plan?
As used in IMPACT, a Strategic Plan is a document that usually describes a multi-year program. It usually begins by describing, in broad terms, the strategies a program will use to achieve these goals, the rationale behind the selection of the strategies identified, and a timeline for implementation of the strategies. The strategic plan also identifies the overall goal that is desired by the efforts described in the Strategic Plan. Sometimes, a strategic plan contains a SWOTs analysis. This analysis describes your program’s strengths, weaknesses, opportunities, and threats.

KEY POINTS:
- A Strategic Plan usually is a multi-year plan
- You can enter one or many Strategic Plans
- A Strategic Plan can help you identify all planning and implementation efforts
- Goals can be linked to Strategic Plans
- Strategic Plans can be cataloged and retrieved by Title, Dates, and Goals

MANAGING STRATEGIC PLANS
IMPACT provides a component that you can use to manage your Strategic Plans. This component provides the ability to catalog and maintain your plans and link them to a goal created in IDENTIFY GOALS. Since Goals identified in IMPACT are associated with your objectives, which are then associated with programs, activities, and services, you will be able to identify all planning and implementation efforts associated with a Strategic Plan.

When you upload your Strategic Plan to IMPACT you will provide beginning and ending dates for the period the plan covers, the last revision date, as well as a title for the plan. You will be able to retrieve plans based upon titles, plan dates, as well as goals.
Create Strategic Plan

Organization *
State Department of Behavioral Health

Plan Title *
2015/2016 SABG Strategic Plan

Plan Status
Inactive  Active

Plan Start Year *
2015

Plan Expiration Year *
2019

Plan Last Updated
2014

Strategic Plan File *
What is a Participant?
A Participant is an individual whom will be receiving services from your Organization. Participants receive Recurring Services.

**KEY POINTS:**
- Participants can be added to IMPACT and assigned to one or more Groups
- Participants are identified by a UNIQUE ID number
- Demographic information (i.e. Age, Gender, Race, and Ethnicity) will be specified for each Participant
- Participants can be used to track who is being served through a Recurring Service

**IDENTIFY PARTICIPANTS**
You will use this option to add Participants that can be assigned to one or more Groups. First, you will enter a Participant ID. You should never use a social security number for this field. Next you will enter the age group, gender, race, and ethnicity of the Participant.

The Status for a new Participant will be Active which you can change to Inactive at any time. Finally, you can select one or more Groups for this Participant. If you have not defined your group you can leave this empty and assign your Participants to groups in **IDENTIFY GROUPS**.

It is important to remember that IMPACT SAPT should never be used to store Protected Health Information or Personally Identifiable Information.
What is a Group?
A group is used to collectively report on a set of participants either using group demographic information or each individual participants information.

**KEY POINTS:**
- Participants can be added to IMPACT and assigned to one or more Groups
- Participants are identified by a UNIQUE ID number
- Demographic information (i.e. Age, Gender, Race, and Ethnicity) will be specified for each Participant
- Participants can be used to track who is being served through a Recurring Service
IDENTIFY GROUPS
You will use this option to add Groups to IMPACT. Groups are used exclusively in RECORD RECURRING SERVICES. You will provide a Name for each Group and optionally a Description. **You SHOULD NOT under any circumstances enter personally identifiable information in the Group Name field.** You should then enter the date that you established this Group. A status field is available so you can specify if the group is Active, Completed, or Discontinued. When you create the group it is set to Active so it can be used. If you set the status as Completed or Discontinued then you will be required to provide a date.

Next you will specify the Type of Group as Summary or Participant. A Summary group is only identified by the demographics of the Group. Therefore, if you have a group of ten individuals you will only specify them by the number of each by age, gender, race, and ethnicity.

If you specify this Group as Participant then you will be identifying individuals in the group by their Participant ID. IMPACT will provide a multi-select list from which you can choose the participants that will comprise the group.

If you specify the Type of Group as Summary then you will be prompted to enter the number of participants and a breakdown by age group, gender, race, and ethnicity. If you specify the Type of Group as Participant then you will select one or more Participants from a drop down containing Participants you entered in the Participants section.
Identify Groups

Groups may be identified by individual participants, or a summary of the group's demographics may be used. Do not enter personally identifiable information such as participant names into the group name or description fields.

Organization *

Program *

Group Title *

Date Established *

Group Description *

Status *
What is a Logic Model?

A Logic Model provides a framework or a roadmap for your efforts. It defines where you are going and how you plan to get there. In your Logic Model, you will identify your Problem Behavior, define your goals, objectives as well as the strategies and activities that you plan to do in order to meet your goals and/or objectives.

**KEY POINTS:**

- IMPACT allows you to catalog and maintain your Logic Models
- Logic Models can be linked to Problem Behaviors
- You may only upload one document per Logic Model record
- You can create multiple Logic Model records

IMPACT is designed to utilize an outcome driven logic model that connects the resources, programs, and/or activities with the desired short-term, intermediate, and long-term program outcomes. IMPACT is not a Logic Model builder. Rather this component of IMPACT is used to catalog and maintain Logic Models produced outside of IMPACT and to provide a reference tool that allows you to view previously saved Logic Models for a selected Problem Behavior or Goal. The Logic Model component also helps you create standardization in annual work plans that address Strategic Plans that span multiple years and simplifies the process of creating annual work plans.

There are some common terms in the literature that are useful in describing your program: resources (inputs), activities, outputs, outcomes, and goals. These terms are consistent in many respects with their use in prevention planning activities and specifically the Strategic Prevention Framework. Below are a few of these terms:

- **Resources** are the investments into your program, including financial, personnel, and in-kind inputs
- **Activities** are the actions taken to produce desired outcomes. This can be confusing since “Services” is the term usually given to this event in prevention. In the prevention field, “Activities” is a term used in the planning process to identify services you intend to provide during the Implementation of phase of your efforts.
- **Outputs** are the product of your activities; the tangible results of activities
- **Outcomes** are the results we achieve from the program or initiative and may be indicated as short-term, intermediate, or long-term outcomes
- **A Goal** refers to the ultimate impact of the program

**Uploading a Logic Model**

The Logic Model is tangential to the work flow of IMPACT. Like the Strategic Plan, Logic Models are uploaded into IMPACT and become a reference tool to be used when you associate the goals, objectives, programs, and activities in your work plan. You can create Logic Models for any Organization for which you are a member, and for any Problem Behavior you have specified during your assessment efforts.
When you implement a Logic Model in IMPACT, you begin by specifying the organization and assigning the Problem Behavior. Next, you can select one or more Goals which you created in IDENTIFY GOALS.

Although Programs or Strategies and Activities are described in your Logic Model, IMPACT does not collect those here since they are more closely aligned to your annual work plan efforts. In IMPACT you will record programs and activities and their associated parameters when you create your work plans.
What is a Work Plan?
A Work Plan is a concrete plan for how your Organization will operate on an annual basis.

**KEY POINTS:**
- Work Plans are annual plans that you can create from your IMPACT planning data (i.e. Goals, Objectives, Programs, etc.)
- You can create different Work Plans for different grants, contracts, or time periods (i.e. Block Grant, Partnerships for Success, Suicide Prevention, etc.)
- Work Plans provide a complete record of your annual plan

Creating a Work Plan
The Work Plan allows you to select the various pieces of planning data (i.e. Goals, Objectives, etc.) and customize separate Work Plans. You may need to create one overall Work Plan for the year or you may have a requirement to have a separate Work Plan for each set of Grant funds or Contract that you have received. IMPACT provides the ability to create more than one Work Plan so that you can fulfill your own individual needs. You will also upload a document to accompany the Work Plan built in IMPACT.

The following parameters will be available as specified below:
- **Problem Behavior** – The list for Problem Behaviors is the IDENTIFY PROBLEM BEHAVIORS.
- **Goal** – The list of Goals you created in IDENTIFY GOALS.
- **Objectives** – The list of Objectives you created in IDENTIFY OBJECTIVES.
- **Programs/Strategies** – The list for Programs and Strategies is the complete list of Programs and Strategies you created in IDENTIFY PROGRAMS.

If you are associated with more than one Organization then you must select the organization for this Work Plan. Next, you must give the plan a unique title or name and select the Start and End dates for the plan. You will then select one or more Problem Behaviors that are addressed by the Work Plan. For each Problem Behavior, you will then be able to select one or more Goals associated with that Problem Behavior. Next, you will be able to select any Objectives associated with the selected Goals. For each Objective, you can then select the Programs associated with those Objectives and likewise any Activities associated with those Programs; providing a complete picture of your Work Plan for the year.
Create Workplan

Organization *

Work Plan Title *

Plan Status
Inactive  Active

Proposed Start Date *
MM/DD/YYYY

Proposed End Date *
MM/DD/YYYY

Work Plan File *

Please proceed to the "Create" tab to build your Work Plan. Once built, you can then click on the "View" tab to see your Work Plan.
## Work Plan

<table>
<thead>
<tr>
<th>A</th>
<th>Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>B</td>
<td>Work Plan Title</td>
</tr>
</tbody>
</table>
| C | Proposed Start Date -  
    Proposed End Date |
| D | Problem Behavior: |
| E | Goal. |
| E1 | Long-Term Outcome: |
| E1.1 | Long-Term Outcome Target Achievement Date: |
| E2 | L-T Progress Indicator: |
| E2.2 | L-T Progress Indicator Measurement Date: |
| F | Objective. |
| F1 | Objective Outcome: |
| F1.1 | Objective Outcome Target Achievement Date: |
| F2 | Obj. Progress Indicator: |
| F2.2 | Obj. Progress Indicator Measurement Date: |
| G | Programs/Strategies. |
| G1 | Program Outcome: |
| G1.1 | Program Outcome Target Achievement Date: |
| G2 | Program Progress Indicator: |
| G2.2 | Program Progress Indicator Measurement Date: |

### Timeline

<table>
<thead>
<tr>
<th>Activities</th>
<th>Timeline</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Start Date</td>
<td>End Date</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Section 3 – IMPLEMENTATION

User Guide
Section 3 - Implement

You will find the following two modules under the IMPLEMENT section:

- Record Single Services
- Record Recurring Services

Starting to IMPLEMENT

Once you have established your plans, you can now record Services against those plans. Be careful not to confuse the term implementation with the frequently used term “Implementation Plan”. The Implementation Plan has already been defined in the IDENTIFY PROGRAMS and IDENTIFY ACTIVITIES components of the Plan section of IMPACT. In IMPACT we use implementation to refer to the execution of your plan. The execution of your plan is managed through the Services components of IMPACT.

All services in IMPACT are categorized as either Single or Recurring Services. A service type code is associated with each service.

Most prevention services require recording both the service population and demographics (race, gender, and ethnicity) of the individuals served. In IMPACT, the prevention service type codes are organized under one of the six CSAP strategies (Information Dissemination, Alternatives, Problem Identification, Community-based Process, and Environmental).

What is a Single Service?

A Single Service is a one-time activity or event that you plan and implement to conduct a program....

KEY POINTS:

- Single Services are associated with a Program
- Single Services can be associated with Activities
- If a Single Service is identified with an Activity, IMPACT will display a Service Type Code
- Staff Hours (i.e. direct and indirect hours) can be specified for all Staff that contributed time to that Service
- A description, Primary IOM Category, Service Population, Location, and Target Zip Codes, Start and End Dates, Number of Attendees, and a Demographic breakdown of attendees can also be specified
RECORDING SINGLE SERVICES
You begin the recording of a Single Service by selecting the Program. If any Activities are defined for the Program, then IMPACT will then provide you with a list of those activities so you can assign the Service to the proper Activity. You can then select one or more Objectives from the list of objectives addressed by the Program selected. If this service has been identified with an Activity, then IMPACT will display the Service Type Code, otherwise you will select the proper code from the list provided. You can now add an optional Description, select the Primary IOM Category, Service Population, Location, and Target Zip Codes for this Service.

The following items comprise the data that recognizes the extent of this Service. They include the Service Start and End Dates, Service Duration, Number of Attendees, and a Demographic Breakdown of attendees.

Remember that you must enter demographics for your single service when using block grant funds. You enter this information as the number of attendees in the service you are recording. Demographic information is broken down as to Age, Gender, Race, and Ethnicity. For example, you would enter the number of males and females that participated in your service.

Finally, you can record staff hours for all staff that participated in the Service.
What is a Recurring Service?
A Recurring Service is a prevention service provided to a fixed group of people at risk for substance use or abuse, who are enrolled for a fixed period of time, in a planned sequence of events. These services are ongoing.
In addition to being a matter of convenience, recurring services is used to ensure that participants are not over-counted. For example, you may establish a monthly two hour classroom presentation to the same group of twelve students over an eight month period. If each of these events were entered as a Single Service then each participant would have been counted eight times and reported as 96 attendees. By recording these events as a recurring service, IMPACT can properly count the participants in this service as twelve and still properly reflect the duration of all of these classroom events as sixteen hours.

**KEY POINTS:**

- Recurring Services allows you to establish a Service that will be used a specified number of times with a selected Group
- Recurring Services are associated with a Program defined in Planning.
- The combination of Program and Group information will start a Recurring Group Series.
- If a Recurring Service is identified with an Activity, IMPACT will display a Service Type Code
- Staff Hours (i.e. direct and indirect hours) can be specified for all Staff that contributed time to that Service
- A description, Primary IOM Category, Service Population, Location, and Target Zip Codes, Start and End Dates, Number of Participants can also be specified

**RECORDING RECURRING SERVICES**

The Recurring Services option allows you to establish a Service that you will use more than once. RECORD RECURRING SERVICES is broken down into two pieces. For each Recurring Service, you will first create the service in the SERVICE SETUP section of RECORD RECURRING SERVICE.

You will begin the recording of a Recurring Service in the same manner as a Single Service by selecting a Program from your list of previously identified Programs. You will then select a Group from your list of previously identified groups. The combination of your Program and Group information will start a recurring group series. You begin the recording of a Recurring Service by selecting the Program. If any Activities are defined for the Program, then IMPACT will provide you with a list of those activities so you can assign the Service to the proper Activity. You will then create a unique Recurring Service Title for the overall Recurring Service record. Next you will select the Group that will receive the Service. This dropdown list will be populated with all active Groups that you created with Identify Groups in the planning component.

You can now add an optional Description, select the Recurring Service Status.

You can then select one or more Objectives from the list of objectives addressed by the Program selected. If this Service has been identified with an Activity then IMPACT will preselect the Service Type Code, otherwise you will select the proper code from the list provided. Finally, you’ll select the Service
Population from the list provided in the system.

Once you have set up a Recurring Service, you can now add multiple EVENT records to that service. IMPACT will count the number of sessions in the order in which the SERVICE EVENTS are added. Each SERVICE EVENT record will start with a Service Date, the Service/Event Duration, Service/Event Location, Numbers Services, an Optional Description, and Notes. You’ll also add Staff Hours, both Indirect and Direct hours directly related to the SERVICE EVENT.

The following items comprise the data that recognizes the extent of this Service. They include the Service Start and End Dates, Service Duration, Number of Participants.

Finally, you can record staff hours for all staff that participated in the Service.
Section 4 – CAPACITY

You will find the following six modules under the CAPACITY section:

- Manage Coalitions
- Manage Business/Partner Members
- Manage Individual Members
- Manage Subcommittees
- Organization Meetings
- Training and Technical Assistance

Managing Coalitions

MANAGE COALITIONS is an optional section in IMPACT that is most useful to Organizations working with more than one Coalition. Any Coalitions created in this section will be able to be linked to both Business/Partner Members as well as Individual Members. To create a Coalition, simply provide a unique title for the Coalition and a Description. You’ll also add Contact information for the Coalition.
Managing Business/Partner Members

Any Businesses and or Partner Organizations that comprise your Coalition should be entered in this section. You may link each Member to a Coalition, if applicable. In addition to your Business/Partner Name, you’ll select the Sector represented by the Business/Partner. You’ll add at least one Contact for each Business/Partner. You may have additional contacts which also may be reflected in this section.

KEY POINTS:

- All Partner and Coalition Members information is collected in IMPACT
- Create a current contact list of your members including a primary contact from each of your Business organizations
- Ensure that coalitions include representation from each of the
Manage Individual Members

Any Individuals that comprise your Coalition should be entered in this section. You may link each Member to a Coalition, if applicable. In addition to the Name, you’ll select the Sector represented by the Member. This is where you should enter any Parents or Youth that may actively participate in your Coalition. Any members entered in this section will be able to be added to Subcommittees or as Meeting Attendees in the Manage Subcommittees and Organization Meetings, respectively.

Managing Subcommittees

MANAGE SUBCOMMITTEES allows you to keep track of all of your SUBCOMMITTEES. Create subcommittees, subgroups, task forces from the BUSINESS/PARTNER AND INDIVIDUAL MEMBERS as well as your STAFF MEMBERS. Any SUBCOMMITTEES added will be available for selection under attendance in Organization Meetings.
Organization Meetings
The Organization Meeting section of IMPACT allows you to keep track of all meetings held by your Coalition. You can track attendance, store meeting artifacts such as agendas, meeting minutes, and/or handouts.

**KEY POINTS:**
- Keep record of any meetings held by your organization to share with your coalition, board, etc.
- Add attendees from your coalition members, subcommittees, and staff
- Upload meeting agendas, meetings, and handouts to keep organized documentation from each of your meetings
Create Organization Meeting

Organization *

Meeting Title *

Meeting Date *

Meeting Duration *

Subcommittee(s)

Attendees- Staff Members
Training and Technical Assistance
The Training and Technical Assistance section of IMPACT allows you to track all training and technical assistance activities that may be requested or received by your Organization.

**KEY POINTS:**
- Keep track and document training needs as they arise in your organization
- Keep record of any trainings that you received and the results of those trainings
- Use training and technical assistance needs to help identify and plan future trainings offered
- Assess the most popular modes of training delivery
- Assess the utilization of training providers in your State, including PRCs

**Requesting Training or TA**
You’ll start by assigning a unique Training/TA Title for the Training and Technical Assistance record that you are creating. You will also provide the date that the training or TA was requested, the Training/TA Topic that your request falls under, and brief description. The status of the record will be set to Needed. Once you have entered a Training/TA record, you’ll either need to update the status to received or closed.

**Closing a Training or TA Request**
Sometimes you will request a training but before the training is received your needs change. You can close any training or TA request that you enter into IMPACT by changing the status on the record to closed. You will be asked to enter the date in which the request is closed and also to provide a reason for why the training or TA is no longer needed.

**Receiving Training or TA**
Once a training is received, you’ll need to update the original request. Click on the record that you choose to edit and update the Status to Received. You’ll then be asked to provide some additional information about the training or TA received. On every Received record, you’ll provide the Date Received, the Delivery Mechanism (i.e. Face-to-Face, Web Conference, Telephone Conference, etc.) that was used to provide the training, the Source of Assistance (i.e. the TA Provider). You’ll also be asked whether the training was timely, whether the training was effective, and to provide any additional feedback that you’d like regarding the training or TA.
## Create Training And Technical Assistance

**Requested**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization *</td>
<td><em>Required. Field to specify the organization that requested the training.</em></td>
</tr>
<tr>
<td>Training/TA Title *</td>
<td><em>Required. Field to specify the title of the training or technical assistance.</em></td>
</tr>
<tr>
<td>Training Date Requested *</td>
<td><em>Required. Field to specify the requested date for the training.</em></td>
</tr>
<tr>
<td>Training/TA Topic *</td>
<td><em>Required. Field to specify the topic of the training or technical assistance.</em></td>
</tr>
<tr>
<td>Brief Description of the Need for the Training</td>
<td><em>Required. Field to specify a brief description of the need for the training.</em></td>
</tr>
<tr>
<td>T/TA Request Status *</td>
<td><em>Required. Field to specify the status of the training or technical assistance.</em></td>
</tr>
</tbody>
</table>
Section 5 – REPORTS

User Guide
SECTION 5 - REPORT MANAGER

The Reports Manager provides access to a number of reports utilizing data across the entire IMPACT system.

KEY POINTS:

- Allows for organizations to retrieve data entered throughout the IMPACT system
- Reports show the relationship between planning efforts with the services that are actually delivered
- A number of filtering options are available allowing organizations to customize how they view their data
- Managing organizations can access data for all organizations that they manage
- Provides plug and play Block Grant Reporting
- Download reports in PDF, Word, and Excel formats

Using the Report Manager

To run a report simply click on the report name from your list of available reports. You’ll then be presented with a unique set of filters for each report. Select the data, such as the date range, that you’d like to have appear in the report. You’ll then click the GENERATE button to create the report.
Use the download option to export the report into a Word, Excel, or PDF document.