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TIPS FOR USING THE SERVICE EFFECTIVELY

Recommended Computer Settings

Screen Resolution

You will get the best screen layout if you set your PC monitor settings to 1024 X 768 pixels or larger. If your screen resolution is smaller (i.e., 800 X 600 pixels), everything on the screen will appear larger. But, if you use 800 X 600 pixels you will have to scroll more both up & down and left & right to access all the data fields.

To change your PC monitor settings, right click on the Desktop background and select Properties. Next, click on the Settings tab and move the Screen Resolution scroll bar to the right (towards “more”) to select 1024 X 768 (or larger) resolution. Click the OK button at the bottom of the window to make the change effective.

*Note: The above steps apply to a PC and may not work if you are using a MAC.

Web Browser

The web browser supported by SD KIT Prevention Service (KPS) is Microsoft Internet Explorer (IE). Mozilla Firefox, Netscape, Safari and other browsers may not be supported by SD KIT Prevention Service (KPS). They may function but not to design specifications. We recommended users have the latest version of IE installed on their computer along with the updates provided by Microsoft (which are released periodically).

Pop-Up Blockers

Modern computer security technology and usability features development have lead to pop-up blocking. Although these new features of internet browsers, toolbars, and other 3rd party managing software blocks hazardous and annoying pop-ups, sites like SD KIT Prevention Service (KPS) require pop-ups to be able to function. If your pop-up blocker is enabled, there is a possibility that SD KIT Prevention Service (KPS) may not function or appear properly. You should either disable the pop-up blocker while using SD KIT Prevention Service (KPS) (while remembering to enable it, if desired, when not in SD KIT Prevention Service (KPS)) or create exceptions for the pop-up blocker. This is cumbersome, but may be easier than making exceptions to the pop-up blocker.

To create exceptions for the pop-up blocker, open your Internet Explorer browser window. Once the browser is open, click the top toolbar option “Tools” and then go to “Internet Options”. After the “Internet Options” window is available, you will want to click on the “Privacy” tab at the top of the window. You will notice while on the “Privacy” tab, at the bottom will be a section on Pop-Up Blockers. If your “Block Pop-Ups” checkbox is checked then click on the “Settings” button. You can now add the SD KIT Prevention Service (KPS) link to the “Allowed Sites” list which the pop-up blocker will ignore when trying to block pop-ups from SD KIT Prevention Service (KPS).

*Note: These are instructions for Internet Explorer 7.0 and may be different for other Internet Explorer version.
Application Navigating

The SD KIT Prevention Service (KPS) is set up in such a fashion that moving from Left to Right on the menu is the best approach to using the application. Start at the Logic Model module, filling in all the information for that area, before moving on to the Planning module. Continuing in this manner will ensure that all of the sections of the application have enough information to function correctly. If all of the different portions are not completed, some modules will not work correctly.

Menu Information

The Menu for the service is located across the top of the screen. Some Menu categories may be broken down into submenu categories to choose from. The Menu categories list the main modules that are within the application. When a Menu category is selected a list of submenu categories will be displayed on the Landing Page as links to access the modules. (For more information on Landing Pages, see the Landing Pages section.)

1. Menu Constant (unchanging). Available at all times.
2. Landing Page Varies depending on which Menu category is selected. Displays the Submenu Categories.
3. Submenu Category Varies depending on which Landing Page is displayed.
4. Listing Page Varies depending on which Submenu Category is selected.

(This is a screenshot displaying the Main Menu (1), a Landing Page (2) and a submenu Category list (3))
The banner above the Menu provides a link to Log Out (Log Out) of the Service. The Provider ID number is listed as well as the user currently logged into the SD KIT Prevention Service (KPS).

**Bread Crumb Trail**

A “Bread Crumb Trail” is provided to indicate where you currently are in the system. The links provided in the Bread Crumb Trail also allows you to move backwards in the system.

- If at any time while working in the application you wish to return to the Home page, you can click the Home link located within the Bread Crumb Trail.

**Tips**

- Clicking the KIT Prevention Service – South Dakota banner above the Menu will also return you to the Home page.
Landing Pages

When first entering a main module you may see a list of the entire submenu categories associated with that module. This is called a “Landing Page”. The Landing Page of each module provides a description of what can be done in that module as well as listing each submenu category as a link to the Listing Page and entry forms. (For more information on the Listing Pages, see the Listing Pages section.) No data is entered on the Landing Page.

To open a category:

- Click on the Landing Page Submenu/Category link.

Tips

- If a submenu category link appears in gray, the user account currently logged in does not have access to that category.
Listing Pages

After selecting a category from the Landing Page you will see the "Listing Page". When going into an area where a Listing Page is available, the service allows you to select previously entered data to edit or view its content. No data is entered on the Listing Page.

- When viewing a Listing Page, all of the data is available for review.

There are three types of Listing Pages:

1. **Grid View**
2. **Hierarchy View**
3. **Single Form View**

Grid View:

The Grid View displays the data in tables. Specific pieces of data will be displayed within the Grid based on the fields within the entry/edit form.

- When first viewing a Listing Page, all of the data is available for review. Click the underlined Name of the data ( narrowly) you would like to edit/view.
- You will be taken to the entry/edit screen. This page will be in edit mode (all data fields will be open for data entry). Make any changes needed to the form. Click the (Save) button to save the changes.

Tips

- If this is the first time data is being entered the Listing Page will be empty.
- Clicking on the field name in a Category field (e.g., **First Name**) will allow you to sort through your files by ascending or descending order.
Hierarchy View:

A Hierarchical View is used when there is a relationship between the data.

- When first viewing the Listing Page, you will need to click the (+) plus sign to activate the hierarchy view. The (+) plus sign will become a (-) minus sign and all the data will display below the link.
- To enter, edit or delete information within the link, click on the desired link.

(This is a sample screenshot displaying a “Hierarchy View” Listing Page.)
**Single Form View:**

The Single Form View is used when the data entered is updated periodically. Only one form is available and edited. The Single Form View displays the fields on the Edit Form. (For more information on Edit Forms, see the [Edit Forms section.](#))

- The form can be edited at any time, but you must click the **Save** button to update the data.

---

<table>
<thead>
<tr>
<th>Provider Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract/Grant Number: 1117</td>
</tr>
<tr>
<td>Contract/Grant Type:</td>
</tr>
<tr>
<td>Check 1: Contract # 1117</td>
</tr>
<tr>
<td>DOE</td>
</tr>
<tr>
<td>SPF</td>
</tr>
<tr>
<td>Other</td>
</tr>
<tr>
<td>DOE</td>
</tr>
<tr>
<td>Funding Type(s): DOE</td>
</tr>
<tr>
<td>SPF SIG</td>
</tr>
<tr>
<td>Provider Name: Support Demo Org 2</td>
</tr>
<tr>
<td>Status: Active</td>
</tr>
<tr>
<td>Address: 716 Main West Street</td>
</tr>
<tr>
<td>City: Rapid City</td>
</tr>
<tr>
<td>State: SD</td>
</tr>
<tr>
<td>Zip: 57702</td>
</tr>
<tr>
<td>Web Site: [<a href="http://www.example.com">www.example.com</a>]</td>
</tr>
</tbody>
</table>

(This is a sample screenshot displaying a “Single Form View” Listing Page.)
Edit Forms

The Edit Form contains the fields for entering and editing data. The buttons for saving, cancelling, deleting, printing, and in some cases, adding and editing, are available at the bottom of the page. (See the Data Fields & Buttons section for additional details on the function of these buttons.)

- If you clicked to enter new information into a form, the Edit Form data fields will be blank.
- When selecting the underlined Name of the data (Name) to view existing data, the Edit form data fields will display the data entered/selected previously. These fields may be modified, if needed.
# Computer Keys

While entering information into a form, several keys are helpful for moving the cursor from one information box (called a data field) to another. The table below summarizes those keys:

<table>
<thead>
<tr>
<th>Key</th>
<th>Description</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="cursor.png" alt="Cursor" /></td>
<td>The Cursor</td>
<td>Points to desired location</td>
</tr>
<tr>
<td><img src="tab.png" alt="Tab" /></td>
<td>The TAB key</td>
<td>Moves the cursor to the next data field</td>
</tr>
<tr>
<td><img src="shift.png" alt="Shift" /></td>
<td>Hold down the SHIFT key and then press the TAB key</td>
<td>Moves the cursor to the previous data field</td>
</tr>
<tr>
<td><img src="ctrl.png" alt="Ctrl" /></td>
<td>The Control (Ctrl) key</td>
<td>Enables blocked material to open (due to pop-up blocker)</td>
</tr>
<tr>
<td><img src="mouse.png" alt="Mouse" /></td>
<td>Use the MOUSE by pointing and clicking to move the cursor</td>
<td>Moves the cursor by pointing and clicking</td>
</tr>
</tbody>
</table>
Data Fields & Buttons

In SD KIT Prevention Service (KPS) there are several fields, boxes, and buttons that are used to collect, store, print, organize and delete data. Here are some examples:

<table>
<thead>
<tr>
<th>Type</th>
<th>Preview/Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text Field</td>
<td></td>
</tr>
<tr>
<td>(aka ‘Text Box’)</td>
<td></td>
</tr>
<tr>
<td>Dropdown List</td>
<td></td>
</tr>
<tr>
<td>(aka ‘Pull Down Menu’)</td>
<td></td>
</tr>
<tr>
<td>Radio Buttons</td>
<td>checked  unchecked</td>
</tr>
<tr>
<td>Check Boxes</td>
<td>checked  unchecked</td>
</tr>
<tr>
<td>Plus/Minus buttons</td>
<td>(click to open) (click to close)</td>
</tr>
<tr>
<td>Expand/Collapse buttons</td>
<td>(expand) (collapse)</td>
</tr>
<tr>
<td>Required field</td>
<td>Group Name*</td>
</tr>
<tr>
<td>Default Page</td>
<td>Default Page (For additional information, see the Default Page section)</td>
</tr>
</tbody>
</table>

Tips

- If a required field does not have data entered into it and you try to save the form, you will receive a message that informs you of the field vacant of data and you will not be able to save that form until that field has data. Some or all of the fields may be required in order to save the form. Those fields that are required are bold and with an asterisk next to the field name.
- Type an identifying letter of an item in a dropdown list to appear in the box.
Default Page

When the Default Page checkbox is selected for a particular page within the SD KIT Prevention Service (KPS), the user will be taken directly to the selected page upon login.

Calendar Feature

Dates can be entered in two different ways: 1) typing the date directly into the field or 2) using the Calendar feature. The Calendar can be used as an alternative option to entering a date directly into a date field.

Using the Calendar Feature

1. When you select a date field, a calendar displaying the current month and year will display below the date field.
2. Select the date by clicking on a number within the calendar.
3. The calendar will close and the date will appear within the date field.

*Note: You can also change the month by clicking the arrows to the right and left of the Month/Year. Clicking the arrow will take you to the previous month whereas clicking the arrow will take you to the next month. For instance, the current month displaying is January. Clicking the arrow will take you to December whereas clicking the arrow will take you to February.
### Edit Form Buttons

Information is entered and edited through the Edit Forms. The table below summarizes the buttons used to enter/edit information into an Edit Form.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create</td>
<td>Must be pressed first to add new information to an Edit Form</td>
</tr>
<tr>
<td>Edit This Record</td>
<td>Allows the Edit Form fields to be “open” for modifications</td>
</tr>
<tr>
<td>Delete</td>
<td>Removes the information currently on an Edit Form from the SD KIT Prevention Service (KPS) database</td>
</tr>
<tr>
<td>Save</td>
<td>Adds the information on an Edit Form to the SD KIT Prevention Service (KPS) database</td>
</tr>
<tr>
<td>Cancel</td>
<td>Cancels the Add or Edit without saving any information entered</td>
</tr>
</tbody>
</table>
Additional Feature Buttons

Each page within the SD KIT Prevention Service (KPS) offers additional help to the user. Click on one of the icons to receive the help needed.

- **Settings**
  Allows you to change the size of the text displayed on the form. (For additional information, see the Settings section)

- **Chat**
  The Chat feature enables users to get immediate assistance from the Customer Support department through an instance messaging system. (For additional information, see the Chat Feature section)

- **Print**
  Prints the information currently on the form.

- **Video**
  Provides the multimedia tutorial video specific to the submenu category.

- **Support Site**
  Directs the user to the SD Support Site.

- **Info**
  Provides information on the topic with regards to treatment.

Below are some additional buttons that may appear on a page or form.

- **View**
  Opens the information in the enter/edit form for viewing or modifications.

- **Select**
  Selects a report to modify for viewing.

- **Show Report**
  Opens a selected report for viewing or printing.
Settings

You can alter the size of the text on a form by using the **Settings** option.

Changing the Text Size

1. Click the **Settings** button.

2. Select the **Text Size** by selecting the appropriate radio button.

3. Click the **Set** button.

   *Note: Click the **Cancel** button to cancel the change.*
Chat Feature

The Chat feature enables users to get immediate assistance from the Customer Support department.

- When the Chat button is selected, a new window opens prompting you to run the LogMeInRescue applet (application).

Tips

- You will need to install the LogMeIn applet in order to connect with Support. This is a free download.
- The installation may take a few minutes.

(This is a screenshot of the download message to use the Chat feature.)
LOGIN PROCEDURE

To login to South Dakota KPS
1. Connect to the Internet and open an internet browser (preferably Internet Explorer)
2. Type in this web site, https://www.kithost.net/sd/ and press Enter on your keyboard
3. Choose the year you want to work on.
   a. Choose the CLICK HERE FOR KIT PREVENTION 2011-2012 LIVE application to view or enter data for 2011-2012.
   b. Choose the CLICK HERE FOR KIT PREVENTION 2012-2013 LIVE application to view or enter data for 2012-2013.
4. Enter the username (login name) provided by your acting administrator in the Login Name text box.
5. Enter the password in the Password text box.
6. Enter the organization ID in the Organization ID text box.
7. Click the Login (Login) button.

To log out of the application, click the Logout (Logout) link in the upper right hand corner.
Tips

- The Login Name IS NOT case sensitive.
- The Password IS case sensitive.

I forgot my Password!

If you are unable to log into the SD KIT Prevention Service (KPS) due to forgetting your Login Name or Password you can retrieve this information by clicking the link entitled "I forgot my Password!".

1. Type your email address in the Email text box.
2. Click the (Send It!) button.

*Note: You will receive a reply with our login information as long as the email address entered matches the email provided in the Staff module.
Service Announcement

The Service Announcement section that is located on the Login page is there to notify users that KPS is receiving any necessary server updates or other important messages regarding the application.

If you see Service Maintenance it means that KPS may be down for a short period of time and you will not be able to log into the application at that time. Server maintenance typically occurs once a month.

Temporary Account

When first accessing the SD KIT Prevention Service (KPS), a temporary account is provided. The temporary account is a one (1) time account used for logging into the SD KIT Prevention Service (KPS) and creating a system administrator (this person will register staff members into the SD KIT Prevention Service (KPS)).

1. Enter the “temporary account” user name in the Login Name text box.
2. Enter the “temporary account” password in the Password text box.
3. Enter the organization id in the Organization ID text box.
4. Click the Login (Login) button.
5. Upon login, you will be required to register a staff member. This will replace the “temporary account”. (For more information on registering staff, see the Staff section for instructions.)
6. Once the new staff account is created, an email notification will be sent to the email address entered on the Staff form. Follow the instructions within the email to activate the new account. (For additional information on activating an account, see the Activating Your Account section.) Upon activating the new account, the “temporary account” will become deactivated; therefore you can no longer login with the “temporary account”.

Tips

• When logging in using the “temporary account” you MUST create a new account. Clicking the (Cancel) button will log you out of the application.
Activating Your Account

Your login information is created for you by your System Administrator. Before accessing SD KIT Prevention Service (KPS) for the first time, you will need to activate your account.

1. Once you have been informed by your System Administrator that an account was created for you, check your email. You should receive an email with instructions for activation.
2. Click the activation link within the email to activate your account.
3. You should receive a confirmation email indicating your account was activated successfully. Click the Login link to log into the SD KIT Prevention Service (KPS).

*Note: Your login information should be provided to you by your System Administrator.

Tips

• Please check your junk mail and spam folders if the activation email is not in your Inbox. Add the following domain to your safe list to ensure you are receiving emails for the SD KIT Prevention Service (KPS): @kitsolutions.net.
The Home page is the SD KIT Prevention Service (KPS) entry point and provides the organization with important messages, upcoming events and links to navigate through the application.

Dashboard
This area is currently under construction.

**Message and Event Notifications**

- To view a Notification, click on the [+](plus sign) next to the Notification title. The [+](plus sign) will become a [-](minus sign).
- To close the Notification, click on the [-](minus sign).
- You may also access these Notifications throughout the Service by clicking the associated [.expand](expand) button at the top of the screen. The [.expand](expand) will become a [collapse](collapse) button. To hide the Notification, click on the [collapse](collapse) button.

*Note: Notifications displaying on the Home page are entered at the State level.*
Prevention Steps and Other Tools

- The Prevention Steps located on the Home page provide users with the best sequence in which to complete their data entry. Start at Logic Model and work your way from top to bottom of the Prevention Steps list to ensure all required data is entered in the proper order.

- The Other Tools section of the Home page provides a collection of helpful modules to assist in the data entry process. Information such as reports, messages and events, staff registration and technical support can all be accessed through the Other Tools list.

(This is a partial screenshot of the Home page displaying the Prevention Steps and Other Tools areas.)
**LOGIC MODEL**

The Logic Model module is used for describing relationships among multiple factors and components in a community, and identifies the strategies that can impact those relationships to achieve a desired outcome.

**Substance Related Consequences**

**Adding a Substance Related Consequence**

1. Click **Logic Model** from the Menu.
2. Click the **Begin Your Substance Abuse Prevention Planning Intervention** button.
   
   *Note: To create a second intervention, click the **Begin Your Second Substance Abuse Prevention Planning Intervention** button.*

3. The **Planning Category** is pre-populated for you.
4. Identifying the priority problem from the **Priority Problem** dropdown list.
5. Select the primary substance related consequence from the **Primary Consequence** dropdown list.

---

*(This is a screenshot displaying the Logic Model Listing Page.)*

*(This is a partial screenshot displaying the Substance Related Consequence Edit Form.)*
6. Using the **Additional Consequences** checkboxes, select any other substance related consequences you wish to identify.

   *Note:* Depending on the Primary Consequence selected, the Additional Consequences options may change.

7. Enter any additional notes regarding the substance related consequence in the **Additional Data** text box, if desired.

8. The **Status** is defaulted to **Active**.
   
   a. **Active:** the substance related consequence is currently in use.
   
   b. **Inactive:** the substance related consequence is no longer in use.

9. Click the **Save** button.

   *Note:* To exit the screen without saving, click the **Cancel** button.
Editing a Substance Related Consequence

1. Click **Logic Model** from the Menu.
2. From the Logic Model Listing Page, click the Substance Related Consequence Name link of the consequence you wish to edit.
3. Make any changes needed to the form.
4. Click the **Save (Save)** button.
   
   *Note: To exit the screen without saving any changes, click the **Cancel (Cancel)** button.

Deleting a Substance Related Consequence

1. Click **Logic Model** from the Menu.
2. From the Logic Model Listing Page, click the Substance Related Consequence Name link of the consequence you wish to delete.
3. Click the **Delete (Delete)** button at the bottom of the form.
   
   *Note: To exit the screen without deleting, click the **Cancel (Cancel)** button.
4. You will receive a message asking if you are sure you want to continue with the deletion. Click the **OK (OK)** button to continue with the deletion.
   
   *Note: Click the **Cancel (Cancel)** button to cancel the deletion.
5. You will receive a confirmation message indicating the substance related consequence has been deleted successfully. Notice that the substance related consequence is no longer in the list.
Substance Use Behavior

Adding a Substance Use Behavior

1. Click **Logic Model** from the Menu.
2. Click the **Add Substance Use Behavior** button.

3. The **Planning Category** and **Priority Problem** are pre-populated for you.
4. Select the substance abuse behavior from the **Behavior** dropdown list.
5. Enter any additional notes regarding the substance abuse behavior in the **Additional Data** text box, if desired.
6. The **Status** is defaulted to **Active**.
   a. **Active**: substance abuse behavior is currently in use.
   b. **Inactive**: substance abuse behavior is no longer in use.
7. Using the **Intervening Variables** checkboxes, select the intervening variables which are contributing to the priority problem.
   a. If **Other** is selected, you will be asked to specify what that intervening variable is using the text box.

8. To select the risk and/or protective factors associated with the intervening variables, first click the (plus sign) to open the list.

9. Using the **Risk & Protective Factors** checkboxes, select the risk and/or protective factors associated with the intervening variables.

10. Click the **Save** (Save) button.

   *Note: To exit the screen without saving, click the **Cancel** (Cancel) button.*

(This is a partial screenshot displaying the Substance Abuse Behavior Edit Form.)
Editing a Substance Use Behavior

1. Click **Logic Model** from the Menu.
2. From the Logic Model Listing Page, click the Substance Use Behavior Name link of the behavior you wish to edit.
3. Make any changes needed to the form.
4. Click the **Save (Save)** button.

   *Note: To exit the screen without saving any changes, click the **Cancel (Cancel)** button.

Deleting a Substance Use Behavior

1. Click **Logic Model** from the Menu.
2. From the Logic Model Listing Page, click the Substance Use Behavior Name link of the behavior you wish to delete.
3. Click the **Delete (Delete)** button at the bottom of the form.

   *Note: To exit the screen without deleting, click the **Cancel (Cancel)** button.
4. You will receive a message asking if you are sure you want to continue with the deletion. Click the **OK (OK)** button to continue with the deletion.

   *Note: Click the **Cancel (Cancel)** button to cancel the deletion.
5. You will receive a confirmation message indicating the substance use behavior has been deleted successfully. Notice that the substance user behavior is no longer in the list.
Adding Interventions

1. Click Logic Model from the Menu.
2. Click the Add Interventions button.

(This is a screenshot displaying the Logic Model Listing Page.)
3. The Planning Category and Priority Problem are pre-populated for you.

4. Select whether the intervention is a single-strategy or multi-strategy intervention from the Is this intervention comprised of multiple strategies? dropdown list.

5. Enter a description of the intervention in the Intervention text box.

6. Select an intervention name from the Intervention dropdown list.

7. The Status is defaulted to Active.
   a. **Active**: strategy is currently in use.
   b. **Inactive**: strategy is no longer in use.

8. Using the Intervening Variables* checkboxes, select the intervening variables which are contributing to the priority problem.
   *Note: The available Intervening Variables were selected when the Substance Use Behavior was added.

9. Using the Risk & Protective Factors* checkboxes, select the risk and/or protective factors associated with the strategy.
   *Note: The available Risk & Protective Factors were selected when the Substance Use Behavior was added.

10. Click the Save (Save) button.
    *Note: To exit the screen without saving, click the Cancel (Cancel) button.
Editing an Intervention

1. Click Logic Model from the Menu.
2. From the Logic Model Listing Page, click the Intervention Name link of the strategy you wish to edit.
3. Make any changes needed to the form.
4. Click the Save (Save) button.
*Note: To exit the screen without saving any changes, click the Cancel (Cancel) button.

Deleting an Intervention

1. Click Logic Model from the Menu.
2. From the Logic Model Listing Page, click the Intervention Name link of the strategy you wish to delete.
3. Click the Delete (Delete) button at the bottom of the form.
*Note: To exit the screen without deleting, click the Cancel (Cancel) button.
4. You will receive a message asking if you are sure you want to continue with the deletion. Click the OK (OK) button to continue with the deletion.
*Note: Click the Cancel (Cancel) button to cancel the deletion.
5. You will receive a confirmation message indicating the intervention has been deleted successfully. Notice that the intervention is no longer in the list.
PLANNING

The Planning module is used to develop a comprehensive strategic plan.

Work Plan

The Work Plan module is used to develop a comprehensive strategic plan and view its status.

Adding an Assessment Summary

1. Click Planning from the main menu.
2. Click Work Plan from the submenu.
3. Click the Assessment Summary header beneath the appropriate Planning Category.
4. The Planning Category is pre-populated for you.
5. Enter a brief description of the assessment summary to identify it by in the Assessment Summary text box.
6. Enter the details of the assessment summary in the Assessment Summary Details text box, if desired.
7. Click the Save (Save) button.

*Note: To exit the screen without saving, click the Cancel (Cancel) button.
Editing an Assessment Summary

1. Click **Planning** from the main menu.
2. Click **Work Plan** from the submenu.
3. Click the Assessment Summary Name link of the summary you wish to edit.
4. Make any changes needed to the form.
5. Click the **Save** (Save) button.
   *Note: To exit the screen without saving any changes, click the **Cancel** (Cancel) button.

Deleting an Assessment Summary

1. Click **Planning** from the main menu.
2. Click **Work Plan** from the submenu.
3. Click the Assessment Summary Name link of the summary you wish to delete.
4. Click the **Delete** (Delete) button at the bottom of the form.
   *Note: To exit the screen without deleting, click the **Cancel** (Cancel) button.
5. You will receive a message asking if you are sure you want to continue with the deletion. Click the **OK** (OK) button to continue with the deletion.
   *Note: Click the **Cancel** (Cancel) button to cancel the deletion.
6. You will receive a confirmation message indicating the assessment summary has been deleted successfully. Notice that the assessment summary is no longer in the list.
Adding a Problem Statement

1. Click **Planning** from the main menu.
2. Click **Work Plan** from the submenu.
3. Click the **Problem Statements** (Problem Statements) header beneath the appropriate Assessment Summary.

4. The **Planning Category** and **Assessment Summary** are pre-populated for you.
5. Enter a brief description of the problem statement to identify it by in the **Short Description** text box.
6. Enter the details of the problem statement in the **Problem Statement** text box, if desired.
7. Click the **Save** (Save) button.

*Note: To exit the screen without saving, click the **Cancel** (Cancel) button.*
Editing a Problem Statement

1. Click **Planning** from the main menu.
2. Click **Work Plan** from the submenu.
3. Click the Problem Statement Name link of the statement you wish to edit.
4. Make any changes needed to the form.
5. Click the **Save** (Save) button.

   *Note: To exit the screen without saving any changes, click the **Cancel** (Cancel) button.

Deleting a Problem Statement

1. Click **Planning** from the main menu.
2. Click **Work Plan** from the submenu.
3. Click the Problem Statement Name link of the statement you wish to delete.
4. Click the **Delete** (Delete) button at the bottom of the form.

   *Note: To exit the screen without deleting, click the **Cancel** (Cancel) button.
5. You will receive a message asking if you are sure you want to continue with the deletion. Click the **OK** (OK) button to continue with the deletion.

   *Note: Click the **Cancel** (Cancel) button to cancel the deletion.
6. You will receive a confirmation message indicating the problem statement has been deleted successfully. Notice that the problem statement is no longer in the list.
Adding a Target Population

1. Click **Planning** from the main menu.
2. Click **Work Plan** from the submenu.
3. Click the [Target Population](#) header beneath the appropriate Problem Statement.
4. The Planning Category, Assessment Summary and Problem Statement are pre-populated for you.
5. Enter a brief description of the target population to identify it by in the Short Description text box.
6. Using the **Age** checkboxes, select the appropriate age ranges for the target population.

7. Using the **Gender** checkboxes, select the appropriate genders for the target population.

8. Using the **Race** checkboxes, select the appropriate races for the target population.

9. Using the **Ethnicity** checkboxes, select the appropriate ethnicities for the target population.

10. Using the **Service Population** checkboxes, select the appropriate populations for the target population.

11. Click the **Save** button.

   *Note: To exit the screen without saving, click the **Cancel** button.*
Editing a Target Population

1. Click **Planning** from the main menu.
2. Click **Work Plan** from the submenu.
3. Click the Target Population Name link of the population you wish to edit.
4. Make any changes needed to the form.
5. Click the **Save** (Save) button.
   *Note: To exit the screen without saving any changes, click the **Cancel** (Cancel) button.

Deleting a Target Population

1. Click **Planning** from the main menu.
2. Click **Work Plan** from the submenu.
3. Click the Target Population Name link of the population you wish to delete.
4. Click the **Delete** (Delete) button at the bottom of the form.
   *Note: To exit the screen without deleting, click the **Cancel** (Cancel) button.
5. You will receive a message asking if you are sure you want to continue with the deletion. Click the **OK** (OK) button to continue with the deletion.
   *Note: Click the **Cancel** (Cancel) button to cancel the deletion.
6. You will receive a confirmation message indicating the target population has been deleted successfully. Notice that the target population is no longer in the list.
Adding a Goal

1. Click Planning from the main menu.
2. Click Work Plan from the submenu.
3. Click the (Goals) header beneath the appropriate Target Population.
4. The Planning Category, Assessment Summary and Problem Statement are pre-populated for you.
5. Enter the details of the goal in the Goal text box.
6. The Status is defaulted to Active.
   a. Active: goal is currently in use.
   b. Inactive: goal is no longer in use.
7. Click the (Save) button.
   *Note: To exit the screen without saving, click the (Cancel) button.
**Editing a Goal**

1. Click **Planning** from the main menu.
2. Click **Work Plan** from the submenu.
3. Click the Goal Name link of the goal you wish to edit.
4. Make any changes needed to the form.
5. Click the **Save** button.

*Note: To exit the screen without saving any changes, click the **Cancel** button.

**Deleting a Goal**

1. Click **Planning** from the main menu.
2. Click **Work Plan** from the submenu.
3. Click the Goal Name link of the goal you wish to delete.
4. Click the **Delete** button at the bottom of the form.

*Note: To exit the screen without deleting, click the **Cancel** button.

5. You will receive a message asking if you are sure you want to continue with the deletion. Click the **OK** button to continue with the deletion.

*Note: Click the **Cancel** button to cancel the deletion.

6. You will receive a confirmation message indicating the goal has been deleted successfully. Notice that the goal is no longer in the list.
Adding a Long-Term Outcome

1. Click **Planning** from the main menu.
2. Click **Work Plan** from the submenu.
3. Click the **Long-Term Outcomes** header beneath the appropriate Goal.

4. The **Goal** is pre-populated for you.
5. Enter the details of the long-term outcome in the **Long Term Outcome** text box.
6. Click the **Save** (Save) button.

*Note: To exit the screen without saving, click the **Cancel** (Cancel) button.*
Editing a Long-Term Outcome

1. Click Planning from the main menu.
2. Click Work Plan from the submenu.
3. Click the Long-Term Outcome Name link of the outcome you wish to edit.
4. Make any changes needed to the form.
5. Click the (Save) button.
   *Note: To exit the screen without saving any changes, click the (Cancel) button.

Deleting a Long-Term Outcome

1. Click Planning from the main menu.
2. Click Work Plan from the submenu.
3. Click the Long-Term Outcome Name link of the outcome you wish to delete.
4. Click the (Delete) button at the bottom of the form.
   *Note: To exit the screen without deleting, click the (Cancel) button.
5. You will receive a message asking if you are sure you want to continue with the deletion. Click the (OK) button to continue with the deletion.
   *Note: Click the (Cancel) button to cancel the deletion.
6. You will receive a confirmation message indicating the long-term outcome has been deleted successfully. Notice that the long-term outcome is no longer in the list.
Adding a Long-Term Outcome Indicator

1. Click **Planning** from the main menu.
2. Click **Work Plan** from the submenu.
3. Click the **Long Term Outcome Indicators** header beneath the appropriate Long-Term Outcome.
4. The **Goal** and **Long Term Outcome** are pre-populated for you.
5. Enter the details of the long-term outcome indicator in the **Long Term Outcome Indicator** text box.
6. Click the **Save** (Save) button.

*Note: To exit the screen without saving, click the **Cancel** (Cancel) button.*
Editing a Long-Term Outcome Indicator

1. Click Planning from the main menu.
2. Click Work Plan from the submenu.
3. Click the Long-Term Outcome Indicator Name link of the indicator you wish to edit.
4. Make any changes needed to the form.
5. Click the (Save) button.
   *Note: To exit the screen without saving any changes, click the (Cancel) button.

Deleting a Long-Term Outcome Indicator

1. Click Planning from the main menu.
2. Click Work Plan from the submenu.
3. Click the Long-Term Outcome Indicator Name link of the indicator you wish to delete.
4. Click the (Delete) button at the bottom of the form.
   *Note: To exit the screen without deleting, click the (Cancel) button.
5. You will receive a message asking if you are sure you want to continue with the deletion. Click the (OK) button to continue with the deletion.
   *Note: Click the (Cancel) button to cancel the deletion.
6. You will receive a confirmation message indicating the long-term outcome indicator has been deleted successfully. Notice that the long-term outcome indicator is no longer in the list.
Adding an Objective

1. Click Planning from the main menu.
2. Click Work Plan from the submenu.
3. Click the Objectives (Objectives) header beneath the appropriate Goal.

4. The Goal is pre-populated for you.
5. Enter the details of the objective in the Objective text box.
6. The Status is defaulted to Active.
   a. Active: objective is currently in use.
   b. Inactive: objective is no longer in use.
7. Select the substance related consequence from the **Logic Model** dropdown list.

8. Using the **Intervention** checkboxes, select the interventions associated with the objective.

9. Click the **Save** button.
   
   **Note:** To exit the screen without saving, click the **Cancel** button.

---

**Tips**

- If you are entering Planning for Capacity Development, your Strategies will be entered using the Objectives form.
  1. Click the **Add** button.
  2. Enter the details of the strategy in the **Strategy** text box.
  3. Click the **OK** button.
  4. A grid will display the strategies entered for the Objective.
**Editing an Objective**

1. Click **Planning** from the main menu.
2. Click **Work Plan** from the submenu.
3. Click the Objective Name link of the objective you wish to edit.
4. Make any changes needed to the form.
5. Click the **Save** button.
   
   *Note: To exit the screen without saving any changes, click the **Cancel** button.*

**Deleting an Objective**

1. Click **Planning** from the main menu.
2. Click **Work Plan** from the submenu.
3. Click the Objective Name link of the objective you wish to delete.
4. Click the **Delete** button at the bottom of the form.
   
   *Note: To exit the screen without deleting, click the **Cancel** button.*
5. You will receive a message asking if you are sure you want to continue with the deletion. Click the **OK** button to continue with the deletion.
6. You will receive a confirmation message indicating the objective has been deleted successfully. Notice that the objective is no longer in the list.
Adding an Intermediate Outcome

1. Click **Planning** from the main menu.
2. Click **Work Plan** from the submenu.
3. Click the **Intermediate Outcomes** (Intermediate Outcomes) header beneath the appropriate Objective.

4. The **Objective** is pre-populated for you.
5. Enter the details of the intermediate outcome in the **Intermediate Outcome Description** text box.
6. Click the **Save** (Save) button.

*Note: To exit the screen without saving, click the **Cancel** (Cancel) button.*
**Editing an Intermediate Outcome**

1. Click **Planning** from the main menu.
2. Click **Work Plan** from the submenu.
3. Click the Intermediate Outcome Name link of the outcome you wish to edit.
4. Make any changes needed to the form.
5. Click the **Save** (Save) button.
   *Note: To exit the screen without saving any changes, click the **Cancel** (Cancel) button.

**Deleting an Intermediate Outcome**

1. Click **Planning** from the main menu.
2. Click **Work Plan** from the submenu.
3. Click the Intermediate Outcome Name link of the outcome you wish to delete.
4. Click the **Delete** (Delete) button at the bottom of the form.
   *Note: To exit the screen without deleting, click the **Cancel** (Cancel) button.
5. You will receive a message asking if you are sure you want to continue with the deletion. Click the **OK** (OK) button to continue with the deletion.
   *Note: Click the **Cancel** (Cancel) button to cancel the deletion.
6. You will receive a confirmation message indicating the intermediate outcome has been deleted successfully. Notice that the intermediate outcome is no longer in the list.
Adding an Intermediate Outcome Indicator

1. Click Planning from the main menu.
2. Click Work Plan from the submenu.
3. Click the Intermediate Outcome Indicators header beneath the appropriate Intermediate Outcome.

4. The Goal, Objective and Intermediate Outcome are pre-populated for you.
5. Enter the details of the intermediate outcome indicator in the Intermediate Outcome Indicator text box.
6. Click the Save (Save) button.

*Note: To exit the screen without saving, click the Cancel (Cancel) button.*
Editing an Intermediate Outcome Indicator

1. Click **Planning** from the main menu.
2. Click **Work Plan** from the submenu.
3. Click the Intermediate Outcome Indicator Name link of the indicator you wish to edit.
4. Make any changes needed to the form.
5. Click the **Save** (Save) button.

*Note: To exit the screen without saving any changes, click the **Cancel** (Cancel) button.

Deleting an Intermediate Outcome Indicator

1. Click **Planning** from the main menu.
2. Click **Work Plan** from the submenu.
3. Click the Intermediate Outcome Indicator Name link of the indicator you wish to delete.
4. Click the **Delete** (Delete) button at the bottom of the form.

*Note: To exit the screen without deleting, click the **Cancel** (Cancel) button.
5. You will receive a message asking if you are sure you want to continue with the deletion. Click the **OK** (OK) button to continue with the deletion.

*Note: Click the **Cancel** (Cancel) button to cancel the deletion.
6. You will receive a confirmation message indicating the intermediate outcome indicator has been deleted successfully. Notice that the intermediate outcome indicator is no longer in the list.
Adding a Strategy

1. Click Planning from the main menu.
2. Click Work Plan from the submenu.
3. Click the Strategies (Strategies) header beneath the appropriate Intermediate Outcome.
4. The **Goal**, **Objective**, and **Intervention** are pre-populated for you.

5. If the Intervention is a single-strategy intervention, the **Strategy** will be pre-populated for you. If the Intervention is a multi-strategy intervention, select the strategy name from the **Strategy** dropdown list.

   *Note*: If the list of strategy names are not suitable for the Intervention, select **Other** from the Strategy dropdown list. You may select up to four (4) **Other** strategies for an Intervention.

6. Select a billing category from the **Billing Category** dropdown list.

7. Enter the details of the short-term outcomes in the **Short-Term Outcomes** text box.

8. Click the **Save** (Save) button.

   *Note*: To exit the screen without saving, click the **Cancel** (Cancel) button.
Editing a Strategy

1. Click Planning from the main menu.
2. Click Work Plan from the submenu.
3. Click the Strategy Name link of the strategy you wish to edit.
4. To modify the strategy details, click the (Edit) button to the left of the appropriate strategy.
5. Make any changes needed to the form.
6. Click the (OK) button.
   *Note: To cancel the activity details, click the (Cancel) button.
7. Click the (Save) button.
   *Note: To exit the screen without saving any changes, click the (Cancel) button.

Deleting a Strategy

1. Click Planning from the main menu.
2. Click Work Plan from the submenu.
3. Click the Strategy Name link of the strategy you wish to delete.
4. Click the (Delete) button at the bottom of the form.
   *Note: To exit the screen without deleting, click the (Cancel) button.
5. You will receive a message asking if you are sure you want to continue with the deletion. Click the (OK) button to continue with the deletion.
   *Note: Click the (Cancel) button to cancel the deletion.
6. You will receive a confirmation message indicating the strategy has been deleted successfully. Notice that the strategy is no longer in the list.
Adding an Activity

1. Click Planning from the main menu.
2. Click Work Plan from the submenu.
3. Click the Activities header beneath the appropriate Strategy.
4. The Goal, Objective, Intervention, and Strategy are pre-populated for you.
5. Click the Add button to enter the activities associated with the Strategy.
6. Enter the details of the activity in the **Activity** text box.
7. Enter the date the activity will begin in the **Start Date** text box as mm/dd/yyyy, mm-dd-yyyy, or use the **Calendar Feature**.
8. Enter the date the activity is schedule to be completed in the **End Date** text box as mm/dd/yyyy, mm-dd-yyyy, or use the **Calendar Feature**.
9. Enter the name of whoever is responsible for the activity in the **Responsible** text box.

10. Enter the process indicators associated with the activity in the **Process Indicator** text box.
11. Enter the outputs associated with the activity in the **Outputs** text box.
12. Click the **OK** button.
   **Note**: To cancel the activity details, click the **Cancel** button.

13. A grid will display the activities entered for the Strategy.
14. The **Billing Category** and **Short Term Outcome** are pre-populated for you.
15. Click the **Save** button.
   **Note**: To exit the screen without saving, click the **Cancel** button.
Editing an Activity

1. Click Planning from the main menu.
2. Click Work Plan from the submenu.
3. Click the Activity Name link of the activity you wish to edit.
4. To modify the activity details, click the (Edit) button to the left of the appropriate activity.
5. Make any changes needed to the form.
6. Click the (OK) button.
   *Note: To cancel the activity details, click the (Cancel) button.
7. Click the (Save) button.
   *Note: To exit the screen without saving any changes, click the (Cancel) button.

Deleting an Activity

1. Click Planning from the main menu.
2. Click Work Plan from the submenu.
3. Click the Activity Name link of the activity you wish to delete.
4. To remove an individual activity, click the (Remove) button to the left of the appropriate activity.
5. To delete all of the activities associated with the strategy, click the (Delete) button at the bottom of the form.
   *Note: To exit the screen without deleting, click the (Cancel) button.
6. You will receive a message asking if you are sure you want to continue with the deletion. Click the (OK) button to continue with the deletion.
   *Note: Click the (Cancel) button to cancel the deletion.
7. You will receive a confirmation message indicating the activity has been deleted successfully. Notice that the activity is no longer in the list.
**Approval**

The Approval module is a read-only module. It allows you to see if the state has approved the various components of your Work Plan. Once these components are approved, you can begin to add Implementation information.

**Viewing Approvals**

1. Click **Planning** from the main menu.
2. Click **Approval** from the submenu.
IMPLEMENTATION

The Implementation module is used to implement the prevention plan.

**Identify Strategy Details**

This module is used to identify strategy details.

**Adding a Program**

1. Click **Implementation** from the main menu.
2. Click **Identify Strategy Details** from the submenu.
3. Click the **Create New Strategy** button.

4. Using the **Objectives** checkboxes, select the objectives to associate with your program.
5. Using the **Intervention** checkboxes, select the interventions to associate with your program.
   *Note: The **Intervention** section will populate once an Objective is selected.*
6. Using the **Strategy** checkboxes, select the strategies to associate with your program.
   *Note: The **Strategy** section will populate once an Intervention is selected.*
7. Using the **Activities** checkboxes, select the activities to associate with your program.
   *Note: The **Activities** section will populate once a Strategy is selected.*
8. Select a strategy type from the **Strategy Type** dropdown list.
9. Select a strategy name from the **Strategy Name** dropdown list.
10. Selecting a Strategy Name will populate the **Strategy Name** and **Strategy Description** text boxes.

(This is a screenshot displaying the Identify Strategy Details Listing Page.)

Create New Strategy button

(This is a partial screenshot displaying the Identify Strategy Details Edit Form.)
Tips

- Each strategy may be associated with multiple Objectives, Strategies, and Activities. When making these selections check off as many as are applicable to your strategy.

11. You must confirm that you read the displayed strategy description, to do so click the checkbox next to the line: **Check here to confirm that you have read the Strategy Description**.

12. The **Status** is defaulted to **Active**.
   a. **Active**: the strategy is currently being implemented
   b. **Inactive**: the strategy is no longer being implemented

13. Select the IOM category from the **IOM** dropdown list.
   a. Selecting the IOM will automatically populate the **IOM Description** field with the appropriate description.

14. Enter the total number of sessions for this strategy in the **Number of Sessions** text box.

15. Enter the number of strategy hours in the **Total Hours** text box, if desired.

16. Enter any notes about the strategy in the **Notes** text box, if desired.

17. Select the **Funding Sources** by clicking on the appropriate checkboxes.
   a. Enter the funding amount to the right of the funding source name.
   b. If **Other – Federal**, **Other – State**, or **Other – Local** is checked, enter the funding source name in the **Please Specify Other** text boxes.

18. Click the **Save** button.
   *Note: To exit the screen without saving, click the **Cancel** button.*
Editing a Program

1. Click Implementation from the main menu.
2. Click Identify Strategy Details from the submenu.
3. Click the Strategy Name link of the strategy you wish to edit.
4. Make any changes needed to the form.
5. Click the (Save) button.
   *Note: To exit the screen without saving any changes, click the (Cancel) button.

Deleting a Program

1. Click Implementation from the main menu.
2. Click Identify Strategy Details from the submenu.
3. Click the Strategy Name link of the strategy you wish to delete.
4. Click the (Delete) button at the bottom of the form.
   *Note: To exit the screen without deleting, click the (Cancel) button.
5. You will receive a message asking if you are sure you want to continue with the deletion. Click the (OK) button to continue with the deletion.
   *Note: Click the (Cancel) button to cancel the deletion.
6. You will receive a confirmation message indicating the strategy has been deleted successfully. Notice that the strategy is no longer in the list.
Identify Groups

The Identify Groups module is used to create groups of participants for Recurring Services.

Adding a Group

1. Click Implementation from the main menu.
2. Click Identify Groups from the submenu.
3. Click the Create New Group button.
4. Select a strategy to associate the group to from the Strategy Name* dropdown list.
   *Note: The Associated Activities field populates once the strategy name is selected.
5. Enter a name for the group in the Group Name* text box.
6. Enter a description for the group in the Group Description text box if you wish.
7. The Status is defaulted to Active.
   a. Active: the group is currently receiving services.
   b. Inactive: the group is no longer receiving services or has completed the strategy.
8. If attendance will be tracked for this group, select the **Participants** tab.
   a. Select from the available participants by clicking the checkbox next to their name.
   *Note*: Participants must be entered into the system to be accessible. See the *Adding a Participant* section for further details.

9. To track only the demographics of the group, select the **Demographics** tab.
   *Note*: Only demographics or individual participants can be tracked, not both.
   a. Enter the total number of participants for this group in the **Number of Participants** text box.
   b. Enter the number of participants by **Age** in the appropriate text boxes.
   c. Enter the number of participants by **Gender** in the appropriate text boxes.
   d. Enter the number of participants by **Race** in the appropriate text boxes.
   e. Enter the number of participants by **Ethnicity** in the appropriate text boxes.

10. Click the **Save** button.
    *Note*: To exit the screen without saving any changes, click the **Cancel** button.

**Tips**
- In the individual participant section the **Check All** link can be used to select all available participants. The **Uncheck All** link can be used to remove selections from all check boxes.
Editing a Group

1. Click **Implementation** from the main menu.
2. Click **Identify Groups** from the submenu.
3. Click the Group Name link of the group you wish to edit.
4. Make any changes needed to the form.
5. Click the **Save** (Save) button.
   *Note: To exit the screen without saving any changes, click the **Cancel** (Cancel) button.

Deleting a Group

1. Click **Implementation** from the main menu.
2. Click **Identify Groups** from the submenu.
3. Click the Group Name link of the group you wish to delete.
4. Click the **Delete** (Delete) button at the bottom of the form.
   *Note: To exit the screen without deleting, click the **Cancel** (Cancel) button.
5. You will receive a message asking if you are sure you want to continue with the deletion. Click the **OK** (OK) button to continue with the deletion.
   *Note: Click the **Cancel** (Cancel) button to cancel the deletion.
6. You will receive a confirmation message indicating the group has been deleted successfully. Notice that the group is no longer in the list.
Identify Participants

The Identify Participants module is used to identify the participants that will receive Recurring Services.

Adding a Participant

1. Click Implementation from the main menu.
2. Click Identify Participants from the submenu.
3. Click the Create New Participant button.

4. Enter the participant’s first name in the First Name* text box.
5. Enter the participant’s middle initial in the Middle Initial text box, if desired.
6. Enter the participant’s last name in the Last Name* text box.
7. Enter the participant’s code in the Participant Code text box, if desired.
8. Select the participant’s gender from the Gender* text box.
9. Enter the participant’s birth date in the Birth Date* text box.
   *Note: If the birth date is unknown, select an age range from the Age Range Selector dropdown list and a birth date that falls within that range will populate in the Birth Date* text box.
10. Select the participant’s race from the Race* text box.
11. Select the participant’s ethnicity from the Ethnicity* text box.
12. The Status is defaulted to Active.
   a. Active: the participant is currently receiving services
   b. Inactive: the participant is no longer receiving services or has completed the program
13. Select the participant’s second language from the Second Language dropdown list, if desired.
14. Select the participant’s service location from the Service Location County text box.
   a. Select the participant’s service location city from the City dropdown list.
   b. Select the participant’s service location 5-digit zip code in the Zip Code text box.
15. Enter the participant’s contact information, if desired, by filling out the **Address**, **City**, **State**, **Zip**, **Phone**, and **Alt. Phone** text boxes.

   *Note*: The telephone number should be entered as a 10-digit number. Do not enter the one (1) before the area code.

16. Enter the participant’s emergency contact information, if desired, by filling out the **Name** and **Phone** text boxes.

   *Note*: The telephone number should be entered as a 10-digit number. Do not enter the one (1) before the area code.

17. Click the **Save** button.

   *Note*: To exit the screen without saving any changes, click the **Cancel** button.
Editing a Participant

1. Click **Implementation** from the main menu.
2. Click **Identify Participants** from the submenu.
3. Click the Participant Name (First Name) link of the participant you wish to edit.
4. Make any changes needed to the form.
5. Click the **Save** (Save) button.
   *Note: To exit the screen without saving any changes, click the **Cancel** (Cancel) button.

Deleting a Participant

1. Click **Implementation** from the main menu.
2. Click **Identify Participants** from the submenu.
3. Click the Participant Name (First Name) link of the participant you wish to delete.
4. Click the **Delete** (Delete) button at the bottom of the form.
   *Note: To exit the screen without deleting, click the **Cancel** (Cancel) button.
5. You will receive a message asking if you are sure you want to continue with the deletion.
   Click the **OK** (OK) button to continue with the deletion.
   *Note: Click the **Cancel** (Cancel) button to cancel the deletion.
6. You will receive a confirmation message indicating the participant has been deleted successfully. Notice that the participant is no longer in the list.

Tips

- You will not be able to delete a participant if it used in conjunction with a service. You will need to set the participant’s **Status** to **Inactive**.
Report Single Services/Activities

The Report Single Services/Activities module is used to report one-time services or activities.

Adding a Single Service

1. Click Implementation from the main menu.
2. Click Report Single Services/Activities from the submenu.
3. Click the Create New Single Service button.
4. Select a strategy name from the Strategy Name dropdown list.
5. The activities associated with that strategy populate the Activity Name field. If more than one activity is listed, use the radio buttons to select the specific activity being reported on.
6. Enter a date for the service in the Service Date text box as mm/dd/yyyy, mm-dd-yyyy, or use the Calendar Feature.
7. Select a duration in hours and minutes, days, weeks, or months from the Duration dropdown lists.
8. Enter a description of the service in the Service Description text box.
9. Select a location for the service from the Location dropdown list.
10. Select a billing category from the Billing Category dropdown list.
   *Note: The Funding Available field will populate as Yes or No indicating whether you have any funding left for the category selected. If No populates, this will not deter you from saving the service.
11. Select the service that was delivered from the Service Delivered dropdown list.
12. Enter a name for the group in the Name of Group text box, or use the Or Choose from Existing Groups dropdown list to use groups entered in previous single services/activities.
13. Enter any notes about the service in the Note text box, if desired.
14. To enter staff hours for the service, click the [Expand Button] under the section heading “You Must Enter Staff Hours”.

*Note: Once you have finished entering the information you can collapse the section again by clicking the [Collapse Button] under the section heading.

  a. Enter the number of [Billable Hours] and [Non-billable Hours] for each staff member that worked on or delivered the service using the [hrs.] text box and [mins.] dropdown list.

15. To enter target populations for the service, click the [Expand Button] under the section heading “You Must Enter Service Populations”.

*Note: Once you have finished entering the information you can collapse the section again by clicking the [Collapse Button] under the section heading.

  a. Select the appropriate check boxes next to the service populations that were present during the service.

  *Note: You can make as many selections as you need.

16. To enter service demographics, click the [Expand Button] under the section heading “You Must Enter Service Demographics”.

*Note: Once you have finished entering the information you can collapse the section again by clicking the [Collapse Button] under the section heading.

  a. Enter the total number of participants that were present at the service in the [Number of Participants] text box.
  b. Enter the number of participants by [Age] in the appropriate text boxes.
  c. Enter the number of participants by [Gender] in the appropriate text boxes.
  d. Enter the number of participants by [Race] in the appropriate text boxes.
  e. Enter the number of participants by [Ethnicity] in the appropriate text boxes.
17. To enter non-demographic activities, click the Expand Button under the section heading “You May Enter Non-Demographic Activities”.

*Note: Once you have finished entering the information you can collapse the section again by clicking the Collapse Button under the section heading.

   a. Use the checkboxes to select your non-demographic activities.

   i. If you select an Information Dissemination checkbox, enter the number of A/V materials disseminated or the number of media campaigns conducted in the appropriate text box.

   ii. If your activities involved compliance, enter the number of compliance checks (at retailers or ID checks at bars and taverns) in the appropriate text box.

18. Click the Save (Save) button.

*Note: To exit the screen without saving any changes, click the Cancel (Cancel) button.
Editing a Single Service

1. Click **Implementation** from the main menu.
2. Click **Report Single Service/Activities** from the submenu.
3. Click the Date link of the activity you wish to edit.
4. Make any changes needed to the form.
5. Click the **Save** (Save) button.

*Note: To exit the screen without saving any changes, click the **Cancel** (Cancel) button.

Tips

- Clicking the **Copy** (Copy) button on the listing page next to a service will copy that service exactly except for Service Date, Description and Hours.

Deleting a Single Service

1. Click **Implementation** from the main menu.
2. Click **Report Single Services/Activities** from the submenu.
3. Click the Date link of the activity you wish to delete.
4. Click the **Delete** (Delete) button at the bottom of the form.

*Note: To exit the screen without deleting, click the **Cancel** (Cancel) button.

5. You will receive a message asking if you are sure you want to continue with the deletion. Click the **OK** (OK) button to continue with the deletion.

*Note: Click the **Cancel** (Cancel) button to cancel the deletion.

6. You will receive a confirmation message indicating the single service has been deleted successfully. Notice that the activity is no longer in the list.
Report Recurring Activities

The Report Recurring Activities module is used to report and manage recurring services or activities.

Adding a Recurring Service

1. Click Implementation from the main menu.
2. Click Report Recurring Services/Activities from the submenu.
3. Click the Create New Recurring Service button.

4. Select a strategy name from the Strategy Name* dropdown list.
5. The activities associated with that strategy populate the Activity Name field. If more than one activity is listed, use the radio buttons to select the specific activity being reported on.
6. Select a group from the Group dropdown list.
7. Select a billing category from the Billing Category* dropdown list.
   *Note: The Funding Available field will populate as Yes or No indicating whether you have any funding left for the category selected. If No populates, this will not deter you from saving the service.
8. Select the service from the Service Delivered* dropdown list.
9. Select Active, Canceled, or Completed from the Group Series Status dropdown list.
10. Enter a date for the service in the Service Date* text box.
11. Select a duration in hours and minutes from the Duration* dropdown lists.
12. Enter a description of the service in the Service Description* text box.
13. Select a location for the service from the Location* dropdown list.
14. To enter target populations for the service, click the (Expand Button) under the section heading "You Must Enter Service Populations".
   *Note: Once you have finished entering the information you can collapse the section again by clicking the (Collapse Button) under the section heading.
   a. Select the appropriate check boxes next to the service populations you wish to choose.
   *Note: You can make as many selections as you need.

15. To enter participant attendance for the service, click the (Expand Button) under the section heading "You Must Track Group Attendance".
   *Note: Once you have finished entering the information you can collapse the section again by clicking the (Collapse Button) under the section heading.
   a. Use the checkboxes next to the participants’ names to select only the participants that were in attendance for the service being entered.
   *Note: You can make as many selections as you need.

16. To enter staff hours for the service, click the (Expand Button) under the section heading "You Must Enter Staff Hours".
   *Note: Once you have finished entering the information you can collapse the section again by clicking the (Collapse Button) under the section heading.
   a. Enter the number of Billable Hours and Non-billable Hours for each staff member that worked on or delivered the service using the hrs. text box and mins. dropdown list.

17. Enter any notes about the service in the Note field, if desired.

18. Click the (Save) button.
   *Note: To exit the screen without saving any changes, click the (Cancel) button.
**Tips**

- In the service population section the **Check All** link can be used to select all available service populations. The **Uncheck All** link can be used to remove selections from all check boxes.
- The group attendance section will only display if the group selected for the recurring service is based on individual participant attendance and not on demographics.
- Billable staff hours **WILL** be invoiced. Non-billable staff hours will **NOT** be invoiced.

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**Editing a Recurring Service**

1. Click **Implementation** from the main menu.
2. Click **Report Recurring Activities** from the submenu.
3. Click the Date link of the activity you wish to edit.
4. Make any changes needed to the form.
5. Click the **Save** (Save) button.

*Note: To exit the screen without saving any changes, click the **Cancel** (Cancel) button.*

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**Tips**

- Clicking the **Copy** (Copy) button on the listing page next to a service will copy that service exactly except for Service Date, Description and Hours.
Deleting a Recurring Service

1. Click **Implementation** from the main menu.
2. Click **Report Recurring Activities** from the submenu.
3. Click the Date link of the activity you wish to delete.
4. Click the **Delete** button at the bottom of the form.
   *Note: To exit the screen without deleting, click the **Cancel** button.*
5. You will receive a message asking if you are sure you want to continue with the deletion. Click the **OK** button to continue with the deletion.
   *Note: Click the **Cancel** button to cancel the deletion.*
6. You will receive a confirmation message indicating the recurring service has been deleted successfully. Notice that the activity is no longer in the list.
INVOICING

Invoice Information
The Invoice Information module is used to enter service time that are not directly related to a service but can be billed to the state. Examples include travel reimbursements or purchasing curriculum.

Adding Invoice Information
1. Click **Invoicing** from the main menu.
2. Click **Invoice Information** from the submenu.
3. Select a Provider from the **Provider** dropdown list.
4. Select an invoice period from the **Invoice Period** dropdown list.
5. Click the **View** button.
6. Click the **Add** button.
7. Enter a service date in the **Service Date** text box as mm/dd/yyyy, mm-dd-yyyy, or use the **Calendar Feature**.
8. Select a federal category from the **Federal Category** dropdown list.
9. Select a service type from the **Service Type** dropdown list.
10. Enter the number of units in the **Units** text box or enter the dollar amount in the **OR Amount** text box.
   *Note: You can enter either Units or Amount; only one is required to save. If you enter an Amount, it will be converted to Units upon saving.
11. Enter a description in the **Description** field.
12. Click the **Ok** button.
   *Note: To exit the screen without saving any changes, click the **Cancel** button.
13. Click the **Save** button.
   *Note: To exit the screen without saving any changes, click the **Cancel** button.
Editing Invoice Information

1. Click **Invoicing** from the main menu.
2. Click **Invoicing Information** from the submenu.
3. Select a provider from the **Provider** dropdown list.
4. Select an invoice period from the **Invoice Period** dropdown list.
5. Click the **View** (View) button.
6. Click the **Edit** (Edit) button to the left of the invoice information that needs editing.
7. Make any changes needed to the form.
8. Click the **Ok** (Ok) button.
   *Note: To exit the screen without saving any changes, click the **Cancel** (Cancel) button.
9. Click the **Save** (Save) button.
   *Note: To exit the screen without saving any changes, click the **Cancel** (Cancel) button.
Deleting Invoice Information

1. Click Invoicing from the main menu.
2. Click Invoicing Information from the submenu.
3. Select a provider from the Provider dropdown list.
4. Select an invoice period from the Invoice Period dropdown list.
5. Click the View (View) button.
6. Click the Remove (Remove) button to the left of the invoice information that needs deleting.
7. You will receive a message asking if you are sure you want to continue with the deletion. Click the OK (OK) button to continue with the deletion.
   *Note: Click the Cancel (Cancel) button to cancel the deletion.
8. You will receive a confirmation message indicating the invoice information has been deleted successfully. Notice that the information is no longer in the list.
9. Click the Save (Save) button.
   *Note: To exit the screen without saving any changes, click the Cancel (Cancel) button.
Contract Information

The Contract Information module displays the funding amounts allocated to your organization for each federal category. The information displayed on the Contract Information page is read only and cannot be edited or deleted. Contract Information is pre-loaded for you by the state.

Viewing Contract Information

1. Click Invoicing from the main menu.
2. Click Contract Information from the submenu.
3. The Contract Information page will display; any available information will be presented in a table and is read only.

(This is a screenshot displaying the Contract Information Listing Page.)
DATA TOOLS

The Data Tools module is used to generate reports to assist with tracking, monitoring, and assessing prevention services.

Opening a Report

1. Click Data Tools from the main menu.
2. Select the type of report you wish to view/print from one (1) of the category tabs (i.e., Administration).
3. Click the Select button to the right of the Report Name to select the report.
4. If applicable, select and enter the desired parameters for the report from the available dropdown lists and text boxes.
5. Click the Show Report button to open the report. The report will open in a separate window.

Tips

• To return to the list of reports, click the tab or click the red X to the right of the report name. Then follow the instructions to open a new report.
• If you have a pop-up blocker on your computer, hold the Ctrl (Control) key down on your computer while selecting the Show Report button.

Printing or Saving a Report

Once you have clicked the Show Report button, the report will open as an Adobe PDF file.

1. Click the print button to print the report.
   *Note: You do not need to save the report to print.
2. Click the disk button to save the report.
This module is available only at the State level.
ADMINISTRATION

The Administration module is used to complete administrative tasks within the KIT Prevention Service, such as updating organization information, staff registration, and changing a password.

Organization

The Organization module has fields that can be filled in with various pieces of information specific to your organization. The Primary Contact information will be useful to the State if there are any questions on the data that has been entered into the SD KIT Prevention Service (KPS).

Editing Organization Information

1. Click **Administration** from the main menu.
2. Click **Organization** from the submenu.
3. Click the **Edit This Record** button.
4. The organization information will display in edit mode.
5. The **Contract/Grant Number**, **Federal Tax ID**, and **Circuit** fields will be pre-populated for you.

6. Using the **Contract/Grant Type** checkboxes, select the contract or grant type your organization has.
   a. If **Other** is selected, you will be asked to specify what that Contract/Grant Type is using the text box.
7. Select the funding source your organization receives funding from using the **Funding Type(s)** dropdown list.
   a. If your organization has another funding source, this can be selected using the dropdown list below the **Funding Type(s)** dropdown list.
   b. If **Other** is selected as the Funding Type, you will be asked to specify what that funding source is using the **Please Specify** text box.
8. The **SPF SIG** and **Provider Name** fields will be pre-populated for you. You may modify the **Provider Name** text box if needed.
9. The **Status** is defaulted to **Active**.
   a. **Active**: your organization is currently providing services
   b. **Inactive**: your organization is no longer providing services
10. Enter your organization’s street address in the **Address** text box.
11. Enter your organization’s city in the **City** text box.
12. Enter your organization’s state abbreviation in the **State** text box.
13. Enter your organization’s zip code in the **Zip** text box.
   *Note*: The zip code can be entered as a 5-digit or 9-digit code.
14. If your organization has a website, the website address can be entered in the **Web Site** text box.
15. Using the **Same as Coalition** checkbox, indicate if the fiscal agent is the same as the Coalition fiscal agent.
16. Enter the fiscal agent’s name in the **Fiscal Agent** text box.
17. Enter the name of the fiscal agent contact in the **Contact Person** text box.
18. Enter the fiscal agent’s street address in the **Address** text box.
19. Enter the fiscal agent contact’s email address in the **Email** text box.
20. Enter the fiscal agent contact’s telephone number in the **Phone** text box, if desired.
   *Note*: This should be entered as a 10-digit number. Do not enter the one (1) before the area code.
21. In the **Primary Contact Information** section, select one (1) of the staff members to serve as a contact person for your organization from the **Choose Contact** dropdown list. The rest of the fields will be loaded for you based on what was entered in the **Staff** form.
   *Note*: Selections for the **Choose Contact** dropdown list were created in the **Staff** section.
22. A list of registered staff members are displayed on the Organization form. When in view mode, a link entitled **Add New Staff** will be displayed. If you need to enter additional staff to the Staff list, select the **Add New Staff** link. You will be taken to the Staff module.

23. Click the **Save** button.

*Note: To exit the screen without saving any changes, click the **Cancel** button.*
Staff
The Staff module is used to register any staff members that should have access to the data entered within the application or performing services within the community.

Adding a Staff Member
1. Click Administration from the main menu.
2. Click Staff from the submenu.
3. Click the **Create New Staff Member** button.

4. The Provider name and Organization ID fields are pre-populated for you.
5. Select the staff member’s salutation from the Salutation dropdown list.
6. Enter the staff member’s first name in the First Name text box.
7. Enter the staff member’s last name in the Last Name text box.
8. Enter the staff member’s title or position in the Title text box.
9. The Status is defaulted to Active.
   a. **Active**: staff member is currently a member of your organization
   b. **Inactive**: staff member is no longer a member of your organization.
10. Select the staff member’s second language from the Second Language dropdown list, if desired.
11. Enter the staff member’s date of hire in the Staff Hire Date text box as mm/dd/yyyy, mm-dd-yyyy, or use the Calendar Feature.
12. Enter a username for the staff member in the **Login Name** text box.

13. Enter a temporary password for the staff member in the **Password** text box. The Password can be any combination of alpha or numeric characters. This Password will be used in combination with the Login Name to log into the SD KIT Prevention Service (KPS). Once a user logs in, the password can be changed to one of their liking using the **Change Password** module.

14. Select the staff member’s permission level from the **Role** dropdown list.

### Tips
- Passwords can be any combination of letters, numbers and/or characters.
- Passwords are case sensitive.

15. Enter the staff member’s work telephone number in the **Work Phone** text box, if desired.
   - **Note:** This should be entered as a 10-digit number. Do not enter the one (1) before the area code.

16. Enter the staff member’s email address in the **Email** text box.
   - **Note:** This must be a valid email address because the Staff member will be emailed once the account has been saved to validate the account before logging in for the first time. (For additional information, see the Activating Your Account section.)

17. Enter the staff member’s fax number in the **Fax** text box, if desired.

18. Select the staff member’s gender from the **Gender** dropdown list, if desired.

19. Select the staff member’s ethnicity from the **Ethnicity** dropdown list, if desired.

20. Select the staff member’s race from the **Race** dropdown list, if desired.

21. Select the staff member’s educational degree from the **Degree** dropdown list, if desired.

22. Enter the staff member’s field of study in the **Field of Study** text box, if desired.

23. Select whether the staff member has been certified from the **Prevention Certified** dropdown list, if desired.

24. Click the **Save** button.
   - **Note:** To exit the screen without saving, click the **Cancel** button.
Editing a Staff Member

1. Click **Administration** from the main menu.
2. Click **Staff** from the submenu.
3. Click the staff member First Name link of the staff member you wish to edit.
4. Make any changes needed to the form.
5. Click the **Save** (Save) button.

*Note: To exit the screen without saving any changes, click the **Cancel** (Cancel) button.

Deleting a Staff Member

1. Click **Administration** from the main menu.
2. Click **Staff** from the submenu.
3. Click the staff member First Name link of the staff member you wish to delete.
4. Click the **Delete** (Delete) button at the bottom of the form.

*Note: To exit the screen without deleting, click the **Cancel** (Cancel) button.
5. You will receive a message asking if you are sure you want to continue with the deletion. Click the **OK** (OK) button to continue with the deletion.

*Note: Click the **Cancel** (Cancel) button to cancel the deletion.
6. You will receive a confirmation message indicating the staff member has been deleted successfully. Notice that the staff member is no longer in the list.

Tips

• Once a staff member has service or administrative time associated with it, it cannot be deleted. Change the status to **Inactive**.
• Setting the **Status** to **Inactive** is used to keep the staff member in the database for history purposes but removed from all of the staff lists on the Edit Forms.
**Change Password**

The Change Password module allows a user to change the password on the account they are currently logged in with.

1. Click **Administration** from the main menu.
2. Click **Change Password** from the submenu.
3. Enter the current password into the **Current Password** text box.
4. Enter a password you would like to use in the **New Password** text box.
5. Retype the password in the **Confirm New Password** text box.
6. Click the **Save** button.

*Note: To exit the screen without saving, click the **Cancel** button.*

**Tips**

- It is important to remember that passwords are case sensitive.
- Passwords can be any combination of letters, numbers, and/or characters.
- Passwords do not expire.