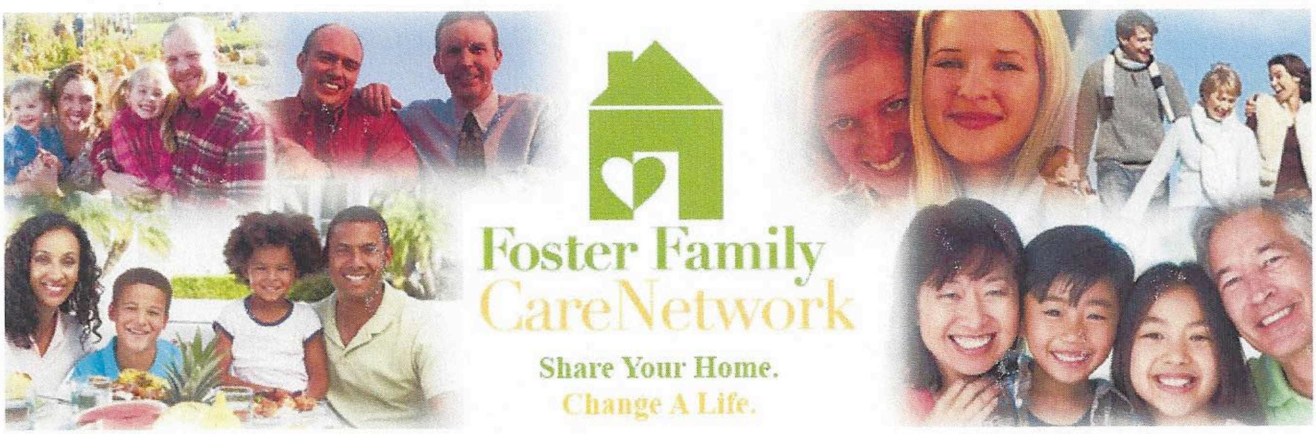
Volume 1

FOSTER FAMILY CARE NETWORK TRAINING SERIES



FFCN DATABASE TRAINING GUIDE

10/15/2013

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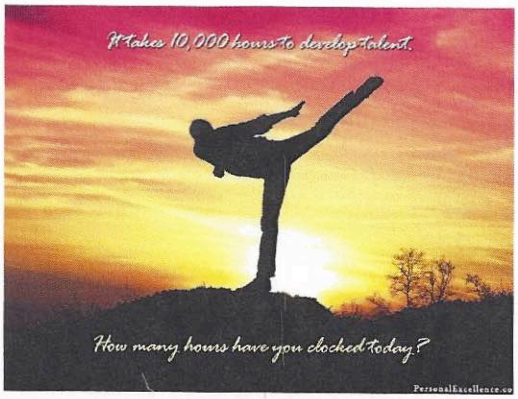


Quiz
1

Achieving a Culture of Data Quality

"Don't be intimidated by what you don't know. That can be your greatest strength and ensure that you do things differently from everyone else." – Sara Blakely

How well do you understand the culture of data quality? Answer each question below before completing your reading to help gauge your knowledge of data quality issues. You'll have a chance to review these questions again to see how your understanding of the culture of data quality has expanded.

Answer each question below before completing your reading to help gauge your knowledge of data quality issues. You'll have a chance to review these questions again to see how your understanding of the culture of data quality has expanded.

1. What is meant by a culture of data quality?

2. Why is collecting quality data important?

3. What are some examples of factors that can affect data quality?

4. Describe two to three roles and responsibilities of staff members involved in the culture of data quality.

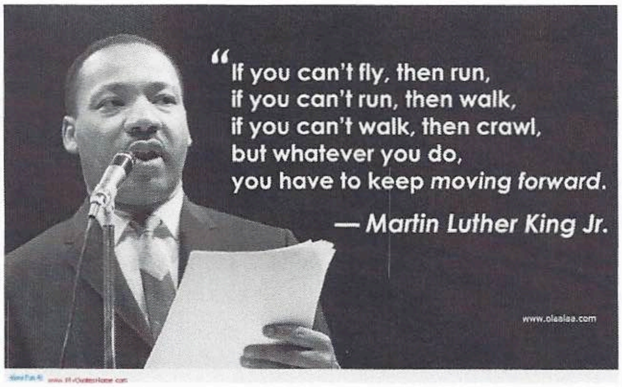
5. Explain the importance of data ownership.

Microsoft Access
Login Yates Debbie
D Yates

Contact Info &
Comm.

Info

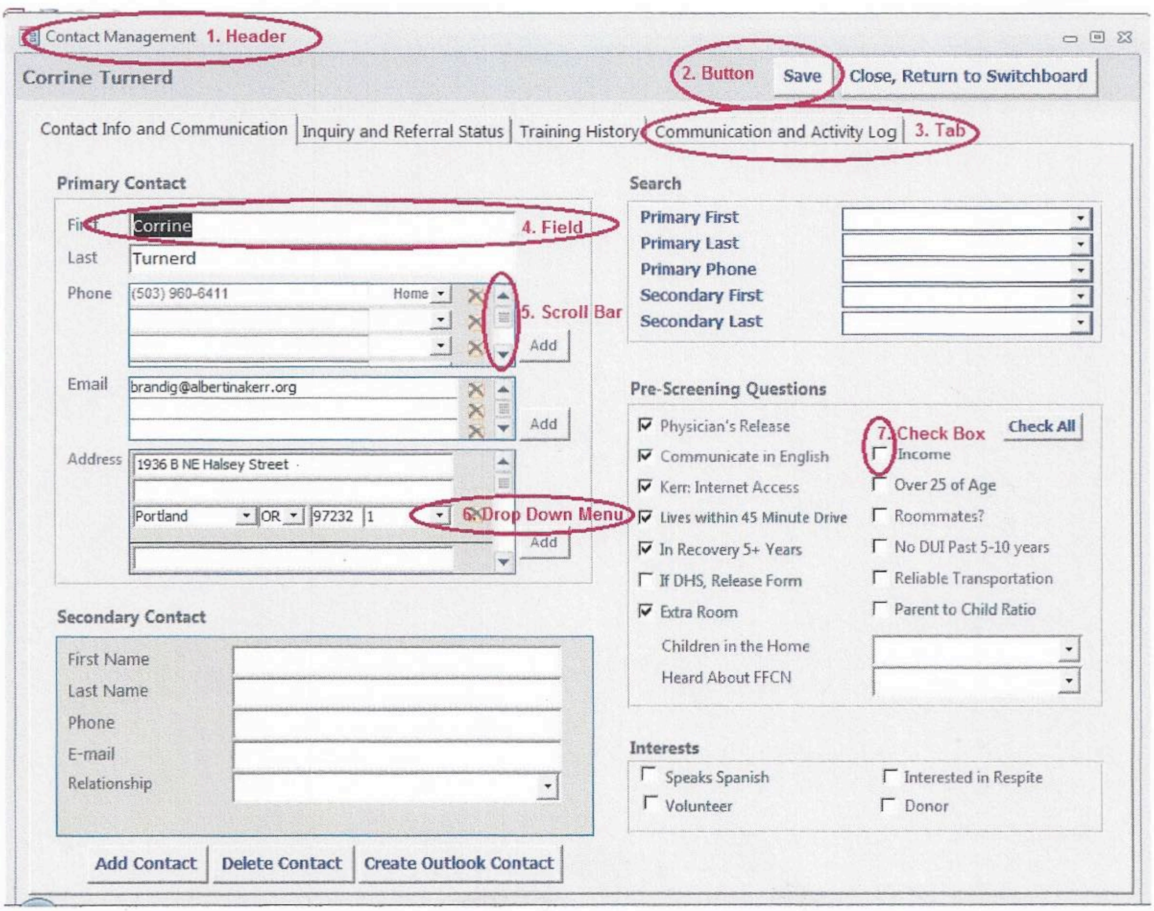
1



Vocabulary

"We gain strength, and courage, and confidence by each experience in which we really stop to look fear in the face… we must do that which we think we cannot."
– Eleanor Roosevelt

In order to be able to understand the instructions in this manual, you will need to understand some of the verbiage that is associated with the database. The following is a screen shot (a "picture" of the screen) of one page with each vocabulary word labeled an d circled:



1. Header: This is usually the name at the top of the screen. You can't click on it. If you are not sure where you are, this can help you figure it out.

2. Button: These are meant to be "clicked" with the right button on the mouse. A button will cause an action to occur – such as a contact to add, save, or delete, or an action that checks all boxes in that section.

3. Tab: This is a noun (not to be confused with the verb "tab" which is also used to denote using the tab key on your keyboard to quickly click through fields in a database). Each tab will take you to a different portion of the database that is all related.

4. Data Entry Field: These are areas where data entry can occur, but must be manually input. It looks like an empty rectangle box. What you enter in this box will not change – it will look exactly like you enter it.

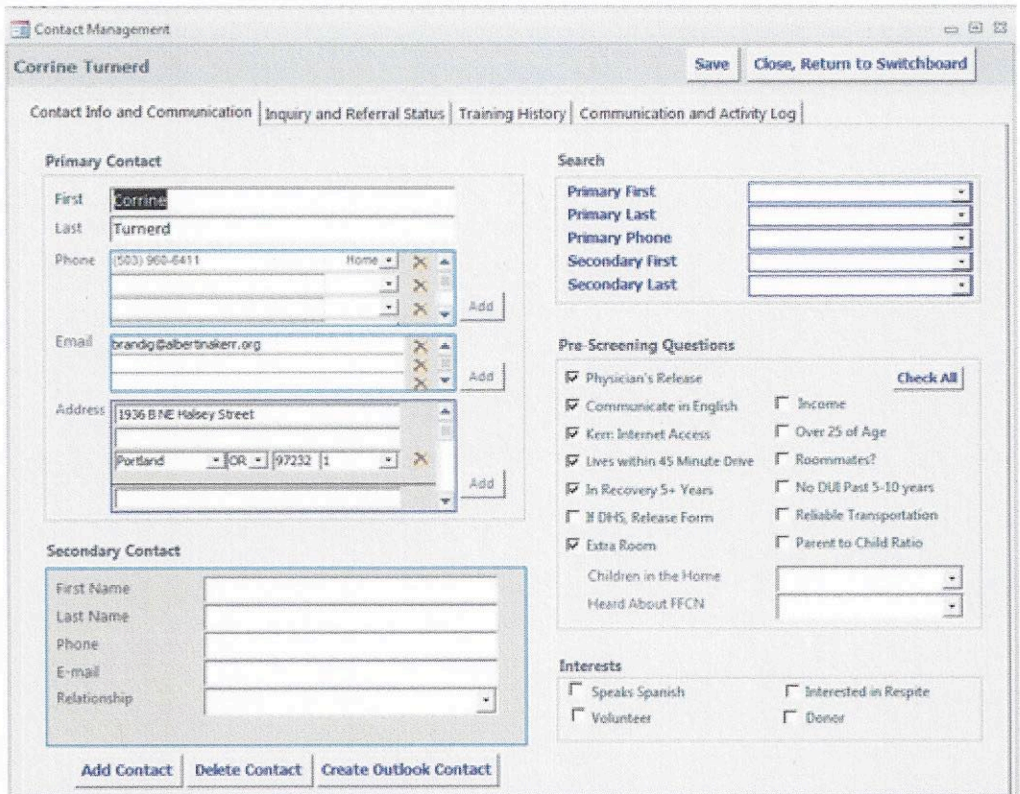
5. Scroll Bar: These are kind of tricky – you have to train yourself to see them. A scroll bar denotes that there is more info to be seen, but it isn't currently on your screen. You right click with your mouse on the lined box between the arrows to move up and down or back and forth to see all the information that is there.

6. Drop Down Menu: This is a rectangle box (a field) with an upside-down triangle at the end. When you right click on this box with your mouse, a "menu" box with a scroll bar will appear with pre-populated information with which to select from. Most times you can either begin to type in the information (i.e. "por" for "Portland") and the item you want will automatically fill in, including any necessary capitalization. You can also right click on this box with your mouse and scroll down with your mouse (each item is highlighted as you scroll over it) and select the item you want by right-clicking on it with your mouse. PLEASE NOTE: It is best to select an item from the drop down menu if at all possible. Some fields will allow you to type in something that isn't in the menu, but some won't.

7. Check Box: This is a square box that precedes a label of an item in a list. If that item applies, click on the box and a check mark will appear. If you change your mind, click on the box again and the check mark will disappear.

Exercises for the Vocabulary Section

- Use the screen shot below to mark your answers:



- Underline the header.
- Fill out all the information as it applies to you in the data entry field's only.
- Fill in all the buttons with your pencil.
- Check all the check boxes. "
- How many scroll bars do you see? _____
- List the four tabs

    1.

    2.

    3.

    4.

- Circle all the drop down menus.

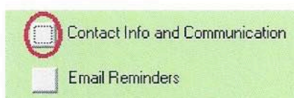
- Which tab are you on and how can you tell?

- BONUS QUESTION 1: What do the boxes that have an X in them in the phone, email, and address sections do?

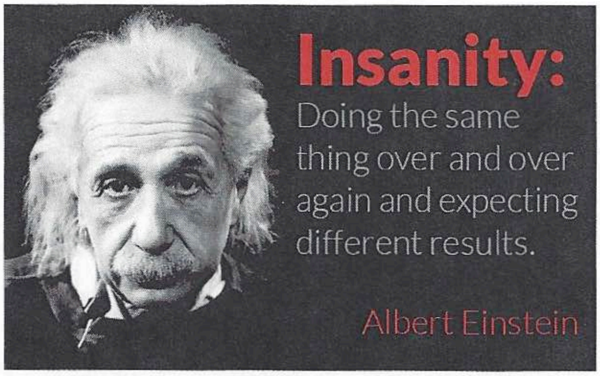
Label the name of each circled area.

1. 

2. 

3. 

- BONUS QUESTION 2: What do the boxes that have an X in them in the phone, email, and address sections do??



Info
2

Navigating Through the Database

"Just because something doesn't do what you planned it to do doesn't mean it's useless." – Thomas A. Edison

Navigating through a database can be based on personal preference. Usually, you can just tab through, click on each field using the mouse, or use the drop-down menus. In this database, most of the time you can choose how you will navigate through each field, but NOT ALL THE TIME. Each section will notate where you will have to use a particular way to navigate. The following are some of the ways to navigate between fields and between screens in the FFCN Revised Database:

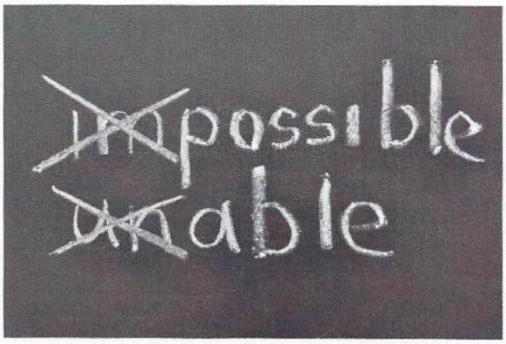
- Usually, the fastest and most effective way to navigate through the fields in the database is to press the "Tab" key. Each time you press "Tab", you should go to the next field in sequence for ease of data entry.
- You can also right click with your mouse in any field that you want to enter information.

Exercises for Navigating through the Database

- When would you "Tab" through each field and when would you use the mouse?

- What is your personal preference on navigating through each field?

- Do you use the mouse to look at the items in the drop down menu, or do you begin to type what you want and let it auto populate?



Section 1

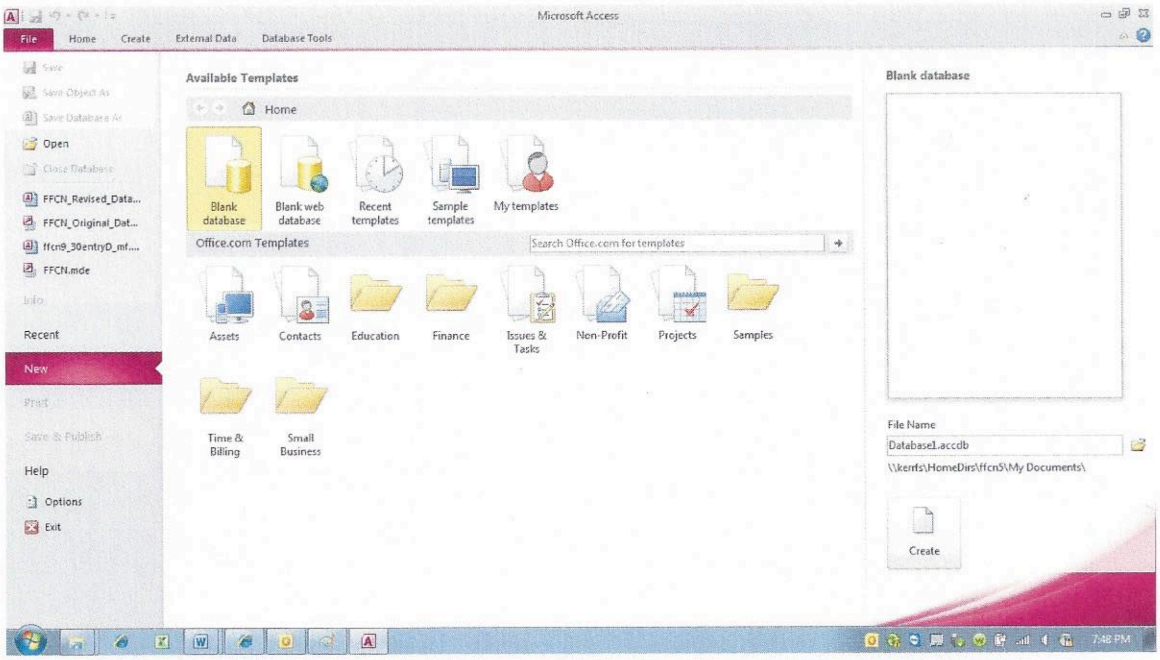
Opening the Database

"Whether you think you can or whether you think you can't, you're right!" – Henry Ford

Here is where we start! Every computer is a little different, but if you follow this guide, you should be able to open the database.

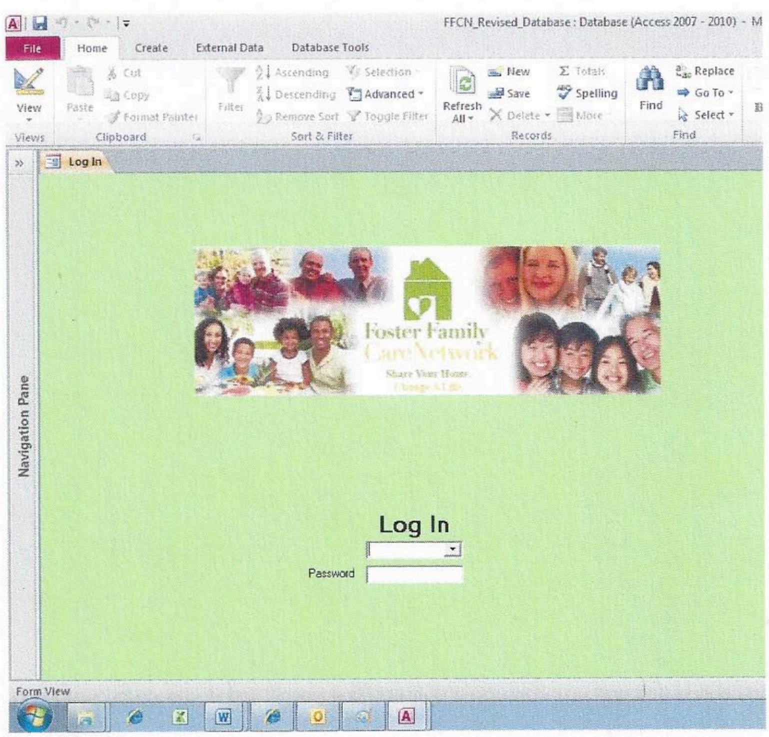
- Log into your FFCN account.
- Double click the icon for "Microsoft Access 2010. It will look something like this: 
- You may or may not have a message pop up. If it does, just wait. It will go away. It might take up to five minutes for it to go away. Basically, the computer is connecting to the network and sometimes that takes time. No worries. It will look like this:

- The Microsoft Access home screen will appear. It will look something like this:

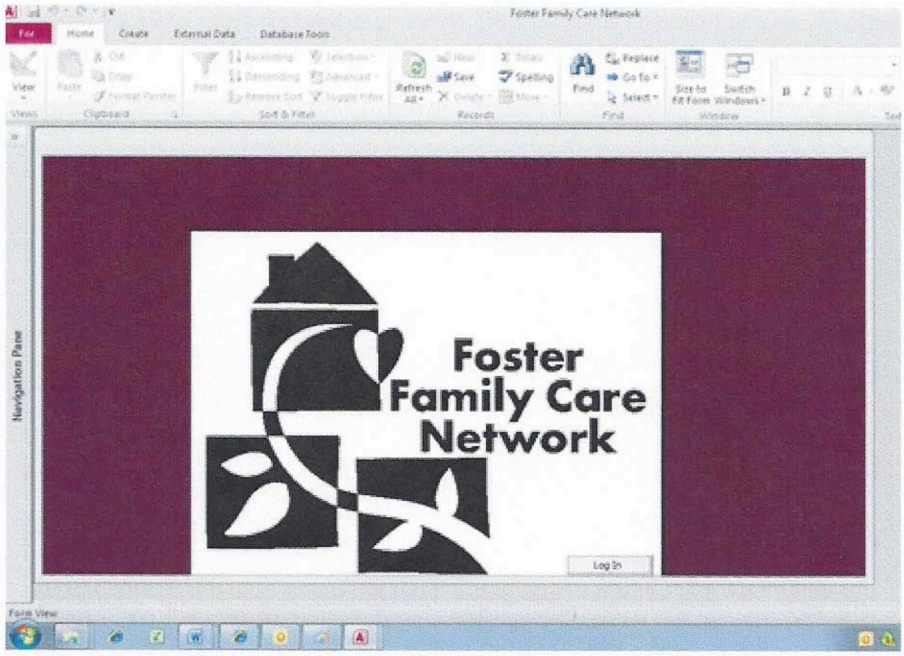


  - From this screen, you can open the FFCN Revised Database (the version we are now using) or the FFCN Original Database (the old version).

  - To open the current (new) database, in the left hand column, click on "FFCN Revised Database". If done correctly, you should see this:

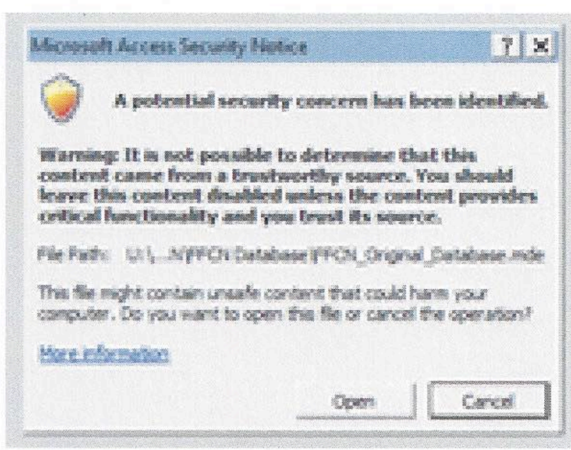


- To open the previous (old) database, in the left hand column, click on "FFCN Original Database". ". If done correctly, you should see this:



You can always go to the Original database and look up previous information. All you have to do to keep them both open at the same time is to go back to the Microsoft Access 2010 Icon (when you already have the FFCN Revised Database open), double click on it, and then follow the instructions above.

- For both versions, sometimes, the following Microsoft Access Security Notice will pop up. Just click on "Open" and continue on your way.



- Congratulations! You should now be on the Log In Screen in both versions. Section 2 will discuss this screen.

Exercises for Opening the Database

- Open the Revised Database. What does the Log In screen look like?

- Open the Original Database. What does the Log In screen look like?

- How can you tell if you are in the correct version of the database?

i'm not telling you it is going to be easy, i'm telling you it's going to be worth it.

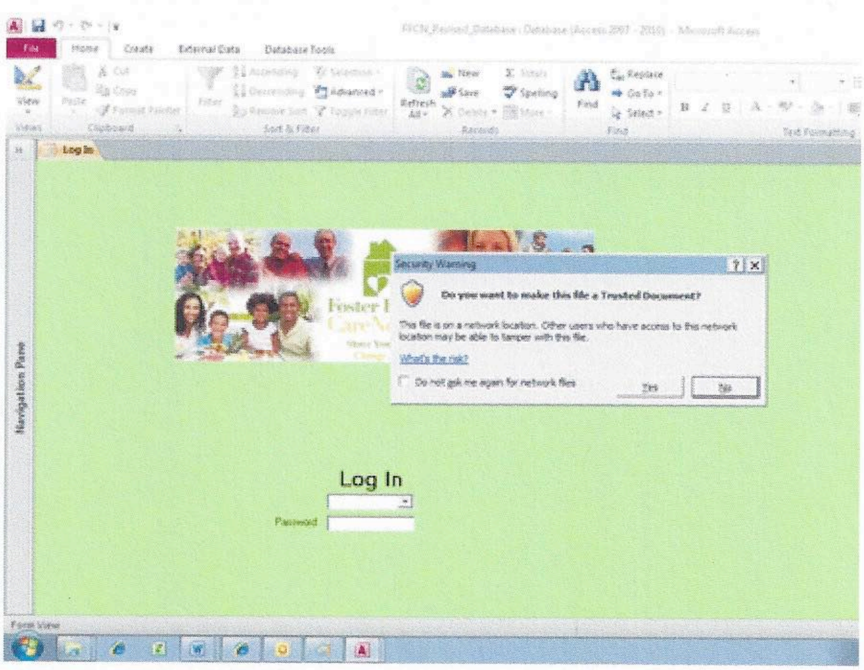
Section 2

Log In Tab

"I always did something I was a little not ready to do. I think that's how you grow." – Marissa Mayer

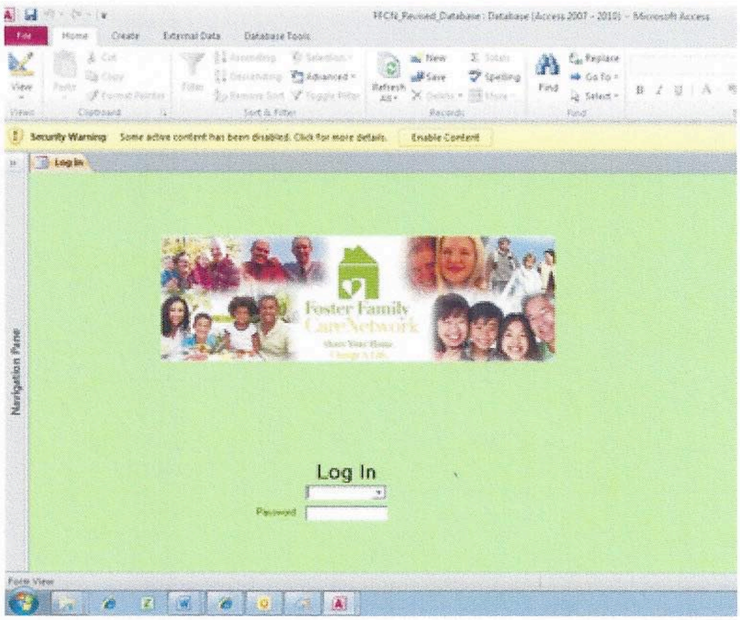
The Log In screen should be fairly simple, but there are a few things you know.

- After you open the FFCN Revised Database, sometimes the following Security Warning will pop up: "Do you want to make this file a Trusted Document?"



  - Check the box "Do not ask me again for network files (and it may or may not do this every time you try and open the database).
  - Click on "Yes" as this is most definitely a trusted document.

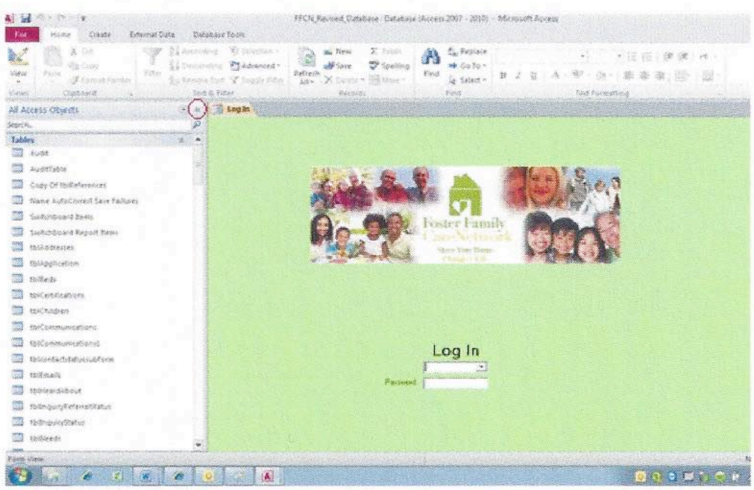
- Another, different kind of Security Warning might appear in the scroll line (a yellowish-orange line that appears below the formatting tab at the top of the page). It reads, "Security Warning. Some active content has been disabled. Click for more details". It looks like this (below):



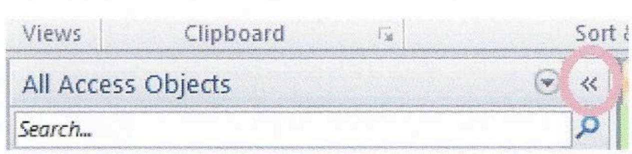
Sometimes both the Security Warnings will populate at the same time! Deal with the pop-up first, then the "Enable Content". Remember, you **can't** make the database explode, even if you wanted to!!

  - Always click on "Enable Content" or you won't be able to do anything.

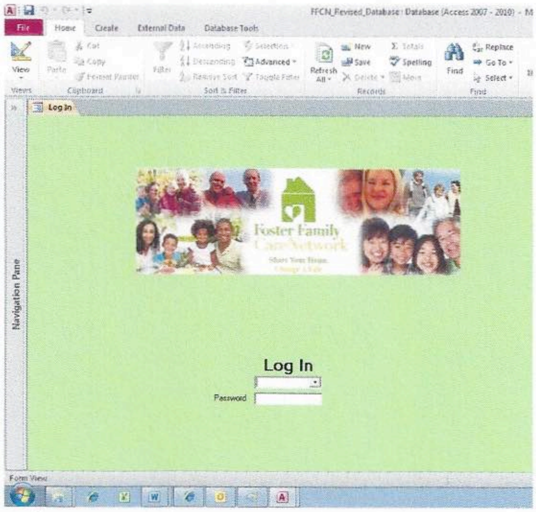
- If the following "All Access Objects" column appears on the left hand side of the screen and you want to minimize (make it smaller) it, just click on the ">>".



  - Here is a close-up of that button if you can't find it :



- You should now be all clear and see the following Log In Screen:



- The first line is for your user name. It is listed by last name first, then first name.

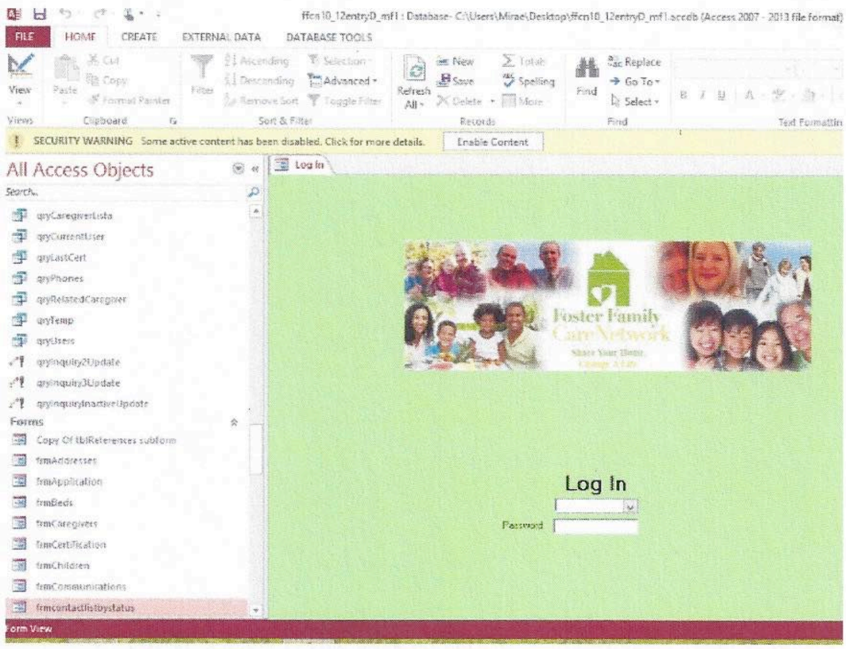
- Password is for where you enter your password.

Exercises for the Log In Tab

- Open the FFCN Revised Database and hide the extra column on the left.

- Log in to the database with your login and password using the drop-down menu to find your last name. .

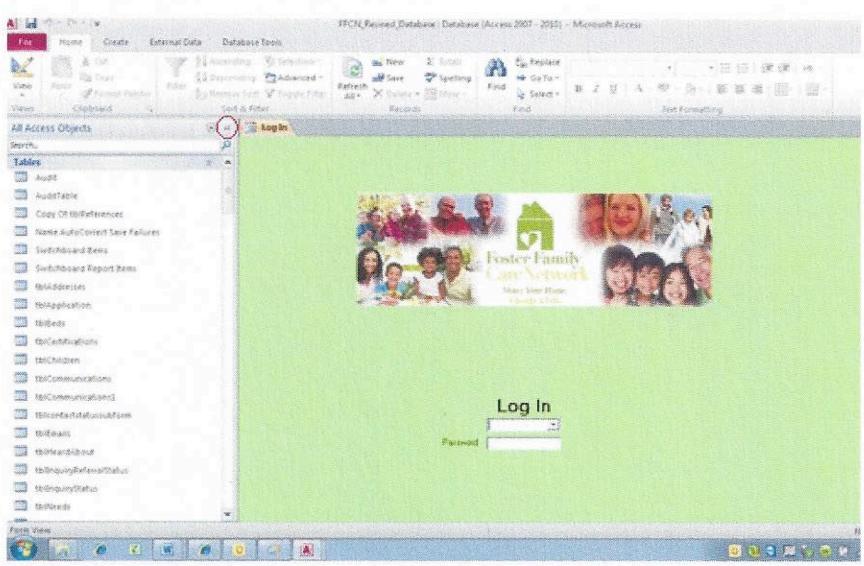
- BONUS QUESTION 1: What would you do if you see the following when you get to the Log In screen?

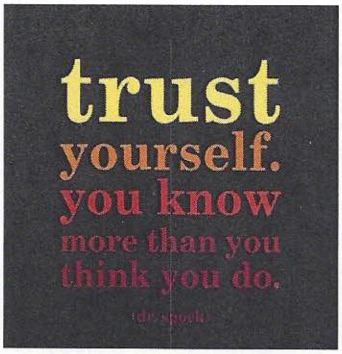


____

____

- BONUS QUESTION 2: Why does the screen shot in Bonus Question 1 look different from the screen shot of the same screen below?



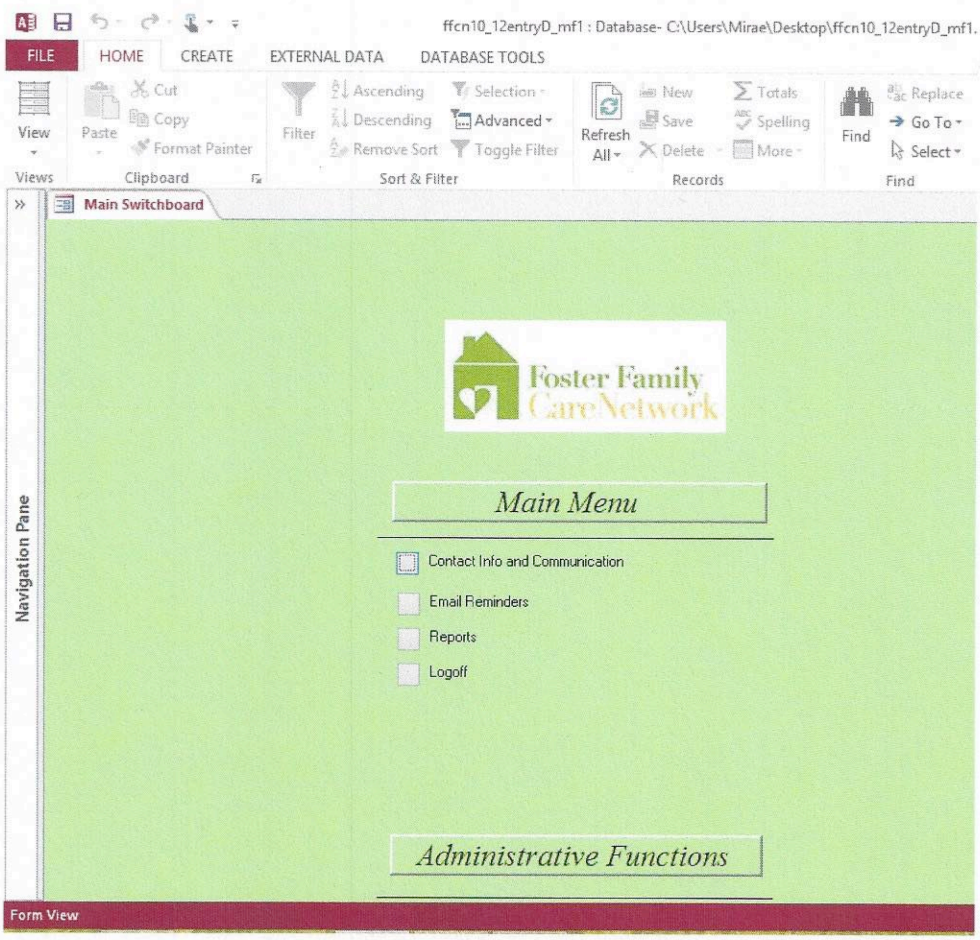


Section
3

Main Menu/Switchboard Tab

"Even if you are on the right track, you'll get run over if you just sit there." – Will Rogers

Congratulations, we are ready to use the database! This screen is called the Main Menu or the Main Switchboard. It is where you select your next step. Most of this screen is not yet active. The only active area is Contact Info and Communication.



Go ahead, click every check box and button. See what happens. You know you want to.

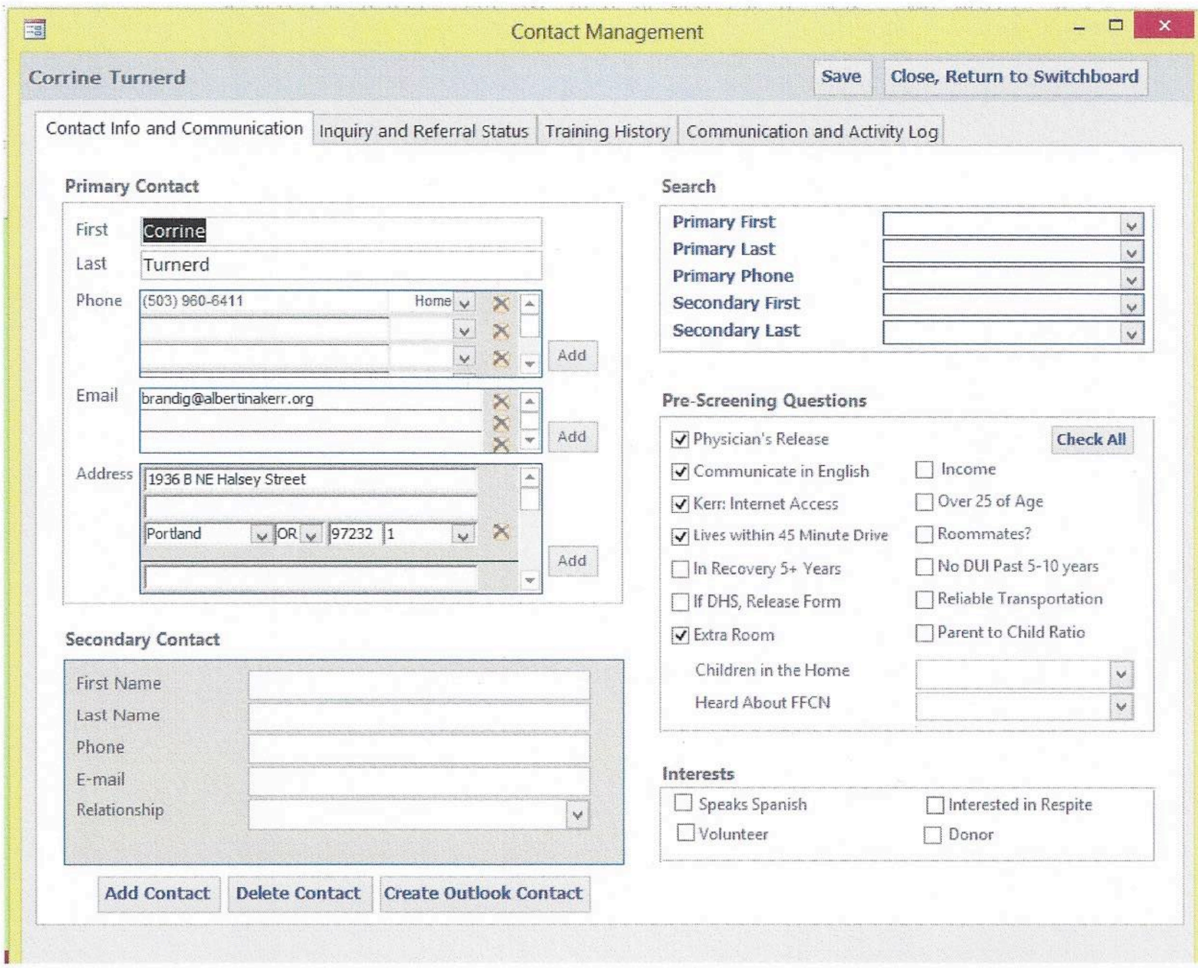
- Click on the checkbox for Contact Info and Communication.

Contact Info and Communication Screen

This screen has the following functions

- Search for existing contacts
- Edit, add, and delete contacts
- Check off prescreening questions
- Notate how many children are in the home
- Note if the contact speaks Spanish, is interested in respite, wants to volunteer or wants to donate

This new search feature takes some getting used to. Play with it. Practice looking up names you know are in the database. This will help you learn the system.

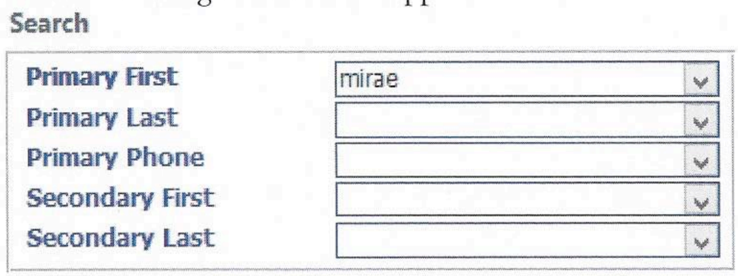


Searching for Contacts

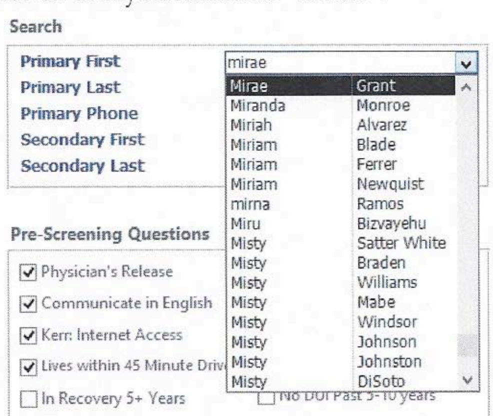
You can search for contacts by the primary or secondary contact's first name, last name, or phone number. Please be aware that this function is very different than what you are used to. PLEASE NOTE: It does not matter what contact is open when you go to the Search section.

- To Search by Primary First Name:

- Put your cursor in the "Primary First" field.
- Type in the first name of the person for whom you are searching. PLEASE NOTE: Nothing will seem to happen.

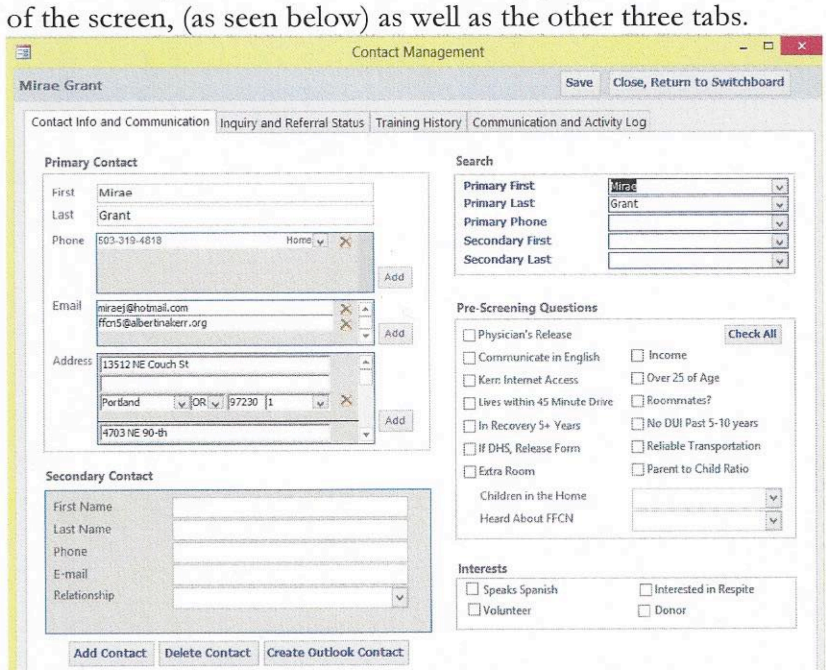


- You have to right click your mouse on the drop down menu function to see a list of everyone named "mirae".

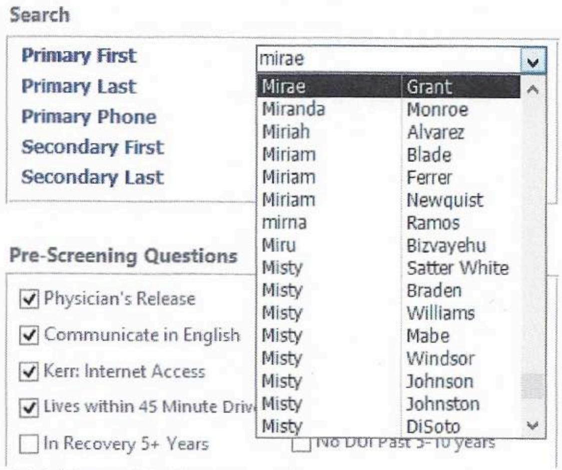


Always search by the most unique part of the name as you will get far fewer search results!

- If "Mirae Grant' is the person for whom you are searching, great. Just scroll down and highlight it with the mouse and right click when it is highlighted. The contact you selected will automatically populate in the rest of the sections of the screen, (as seen below) as well as the other three tabs.



- PLEASE NOTE: What if you were searching for Misty Williams? You would enter "misty" in for the Primary First, then open the drop down menu. You would see the following menu:

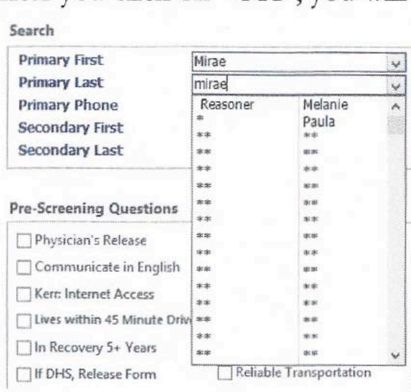


PLEASE NOTE: You don't have to clear out what is already in the fields. Just highlight the name in the field and overwrite it.

- To Search by Primary Last Name
    - Follow the same rules as above
    - This time, you will have already entered Mirae Grant, so that is the name that will populate in both fields. Ignore it. Type in "mirae" in the last name field. Since there is no one in the database with a last name of "Mirae", you will get the following error message:

Just click on "ok".

- After you click on "OK", you will see the following:

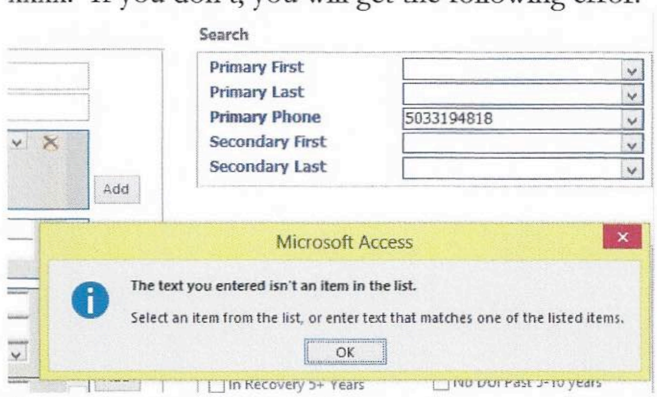


Known Issues

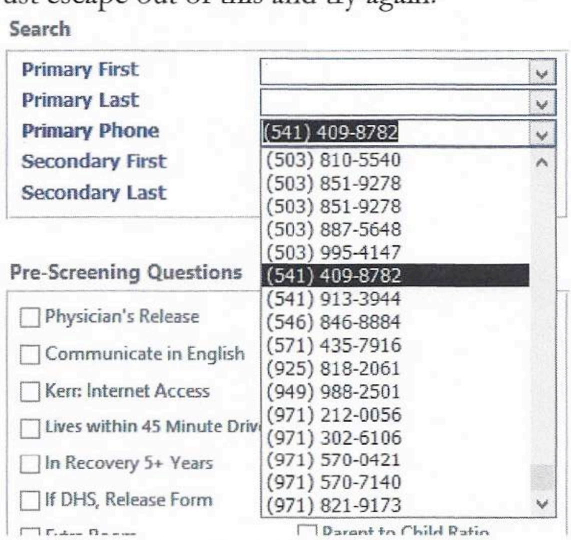
What you should notice is that although the first names are in alphabetical order, the last names (linked to the first name) ARE NOT. This is a Known Issue and will be addressed at a later date. For now. You will have to search visually through every name in the drop down list that populates based on the initial search criteria until you find the contact you want. Most of the time, this shouldn't be a problem. But if the contact you are searching for is named John Pukelli, I suggest you search by Pukelli and not John.

The database is taking you to its first record and you can scroll down all 5000 names to find the one you want, if you so choose. I do not recommend that course of action. However, you must erase what you have input into the field to search for another name or even get out of the Search section. Click on the "Esc" key on your computer and the original data will populate (in this case, "Grant" since we were on that contact).

- To Search by Primary Phone: This is a little trickier. If you follow the rules, you will be fine.
  - You must use this format to type in the phone number to search: (xxx) xxx-xxxx. If you don't, you will get the following error:



Just escape out of this and try again.



- To Search by Secondary First Name
  - Follow the same rules as above
- To Search by Secondary Last Name
  - Follow the same rules as above

One Final Note: When you enter in a new contact, you won't be able to search for that contact until you exit completely out of the database and then enter back in.

Known Issues

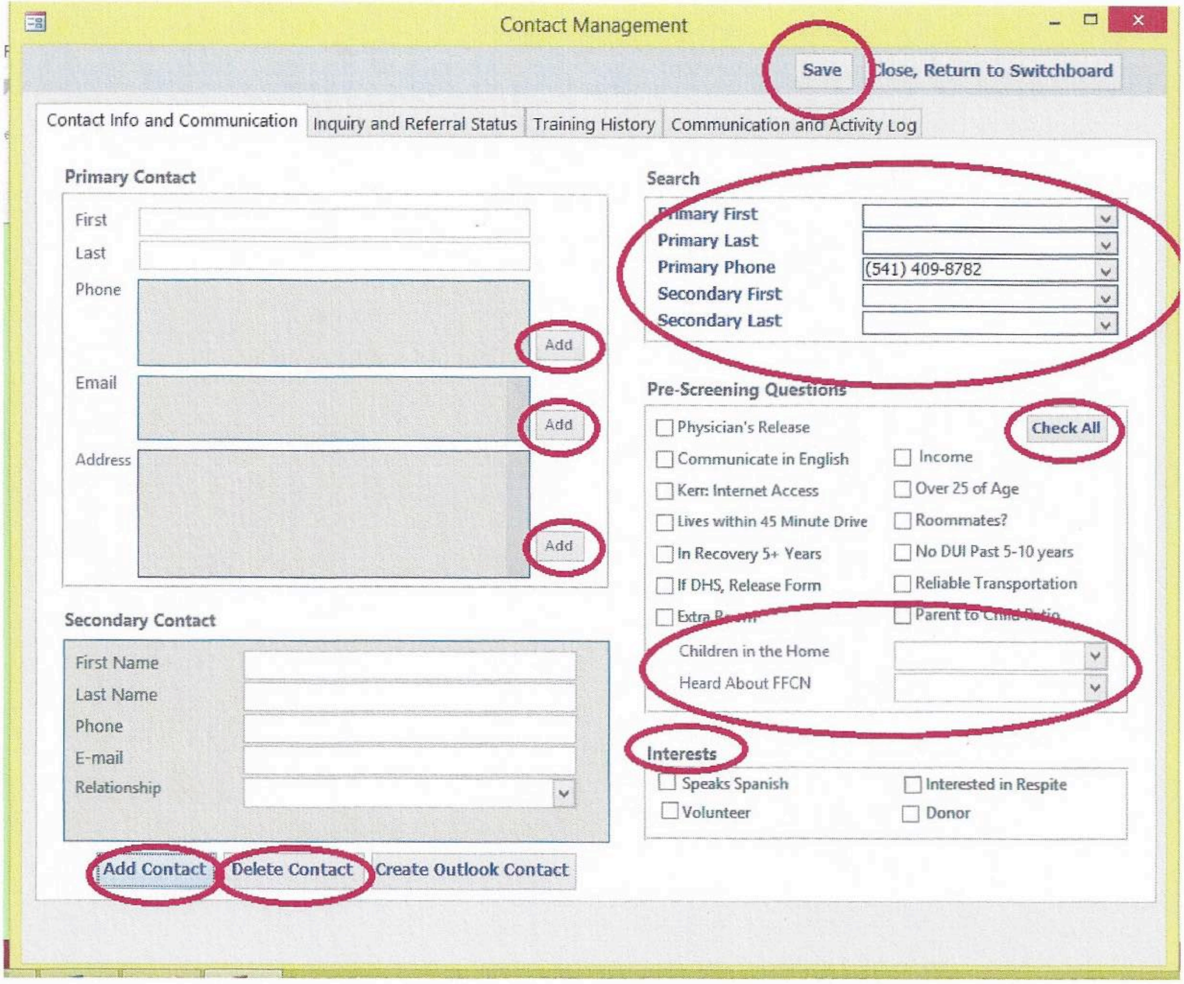
1. Just as with the search function with the names, the phone numbers aren't listed in numerical order.

2. Some numbers just won't come up no matter what we do – Sarah Carter I am talking to you! You will have to get used to searching by name, then phone number if that doesn't work.

Entering in Contacts

This section is fairly self-explanatory, but there are some things of which to be aware:

escape to return.



Be careful!! Unlike the original database, you HAVE to click on "Add Contact". If you don't, you will edit someone else's profile!! That would be bad.

- If the contact isn't in the database, go to the bottom right hand of the screen and click the button, "Add Contact". This will clear the contact screen.
    - Be aware that the Search Section will still have information there – it will have no effect on your new contact. (In the above sample, the phone number 541-409-8782 is still showing as that was our last search criterion. It won't affect your input.)
    - Be aware that whatever you type in saves automatically. However, I like to make sure it saves, so there is now a button to click on "Save".

- Under Primary Contact:

Known Issues

When you click on "Add" for "Phone" and place your cursor into the field, the cursor will still be the wrong place and you won't be able to input the phone number correctly. Just be sure to get in the habit of pressing the "Home" key on your keyboard after you place your cursor in the field.

- The First and Last are fields where you enter the data. Please be sure to use standard capitalization.

    - The Phone, Address, and Email sections require that you first click on the "Add" button before you enter in any information. When you click on "Add" for these items, you will have to manually move the cursor into the field you want.

    - You do not need to add in any characters while entering the phone number. Just enter it in like this: 1112223333. If you don't, you won't be able to enter in the full phone number and the computer will beep at you.

Known Issues

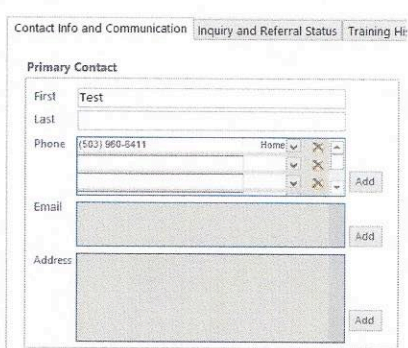
- typed in "Test" as the first name,

There is a HUGE known issue concerning phone numbers, addresses, and emails. Basically, for some reason, when you add in a new contact, sometimes the phone number and/or email and/or address pull in from somewhere else. We will have to work around this for the time being. DON'T ADD OR DELETE ANY OF THE PHONE, EMAIL, OR ADDRESS if it populates when you input a new Contact. Just enter in the name, save, and exit out of the database. Re-log in, search for the contact by name, and then go and add in all the information. If you have a stack to input, then add in all the contacts by first and last name only, exit out of the system and search and edit that Contact. Otherwise, we will have a big mess!

i

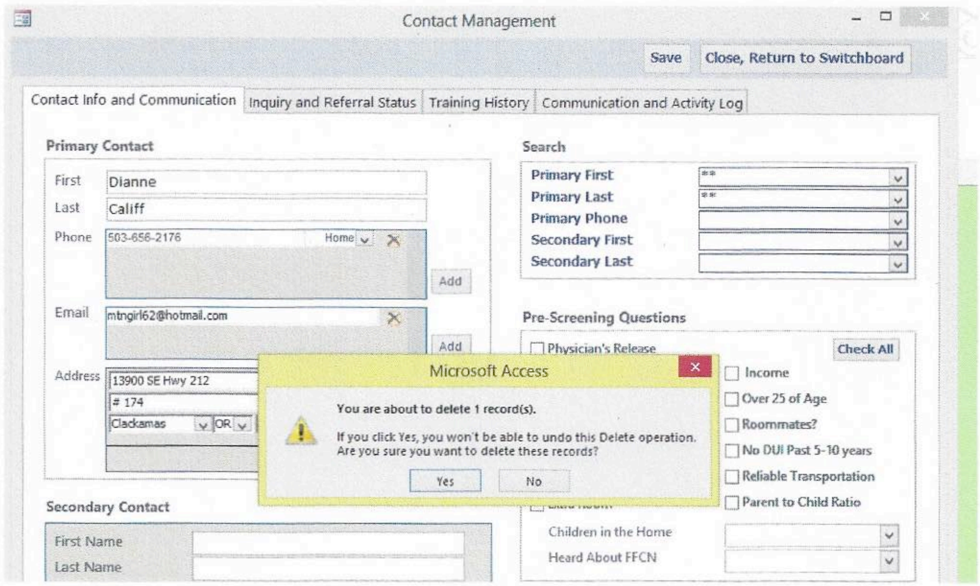
c

ked on "Add" for phone, and the phone number 503-960-6411 was already in there. That is Corrine Turnerd's phone number. If you change, add or delete it at this point, then you will actually be changing, adding, or deleting Corrine's phone number, not Test's!!!!!!



BE AWARE that when you first click on "Delete Contact" and the pop-up message shows up, the contact you are considering deleting disappears and sometimes another name shows up (I was deleting Test Test, and Dianne Califf populated). THAT IS NORMAL. You are NOT deleting Dianne.

- When you click on "Delete Contact", you are deleting the entire contact that is displayed – all tabs, all screens. There is no Undo function. You will get the following pop-up message:



Click on your answer. It's ok. You can delete a record. Just make sure you want to delete it.

Exercises for the Contact Info and Communication Screen

- When would you search by first name, last name, or phone number?

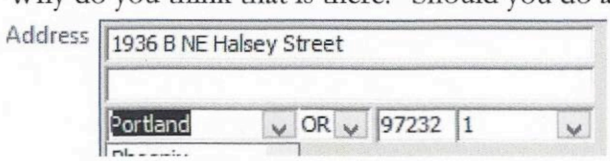
  ___

  ___

- Search for your own name. If you are in the database, update your contact information. If you are not in the database, add in your contact information.

- Search for the phone number 503-621-1455. Who is that contact?___

- Look up Corrine Turnerd. Where there should be the county, there is the number "1". Why do you think that is there? Should you do anything?



  ___

  ___

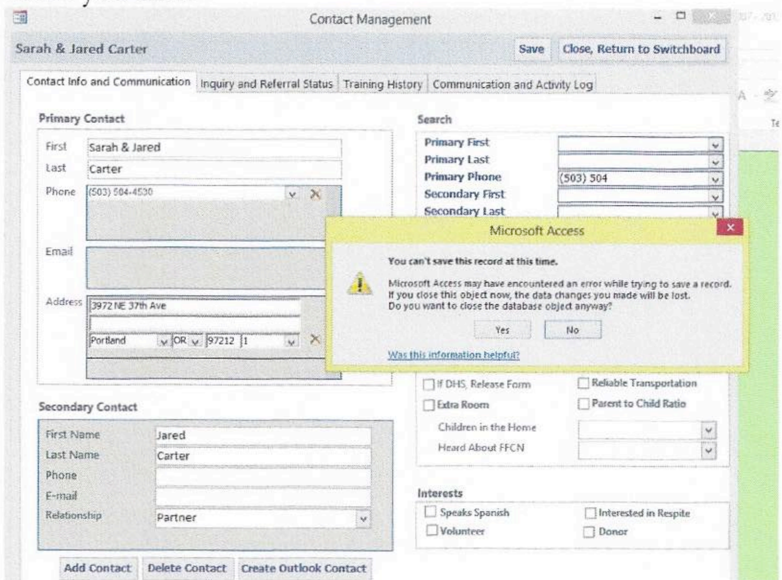
- Look up "*" as a first name (yes, it's an asterisks). Delete this record.

- What should you input if you don't know if there are any children in the home?

- What should you input if you don't know how they heard about FFCN?

- Look through the screen shot below of a search by first name. How many duplicates do you see? How many misspellings can you find? What do you notice as you scroll all the way through?

☑ BONUS QUESTION: What would you do if you received this message when you were searching by primary phone number ? What do you think could have caused it? How could you fix it?

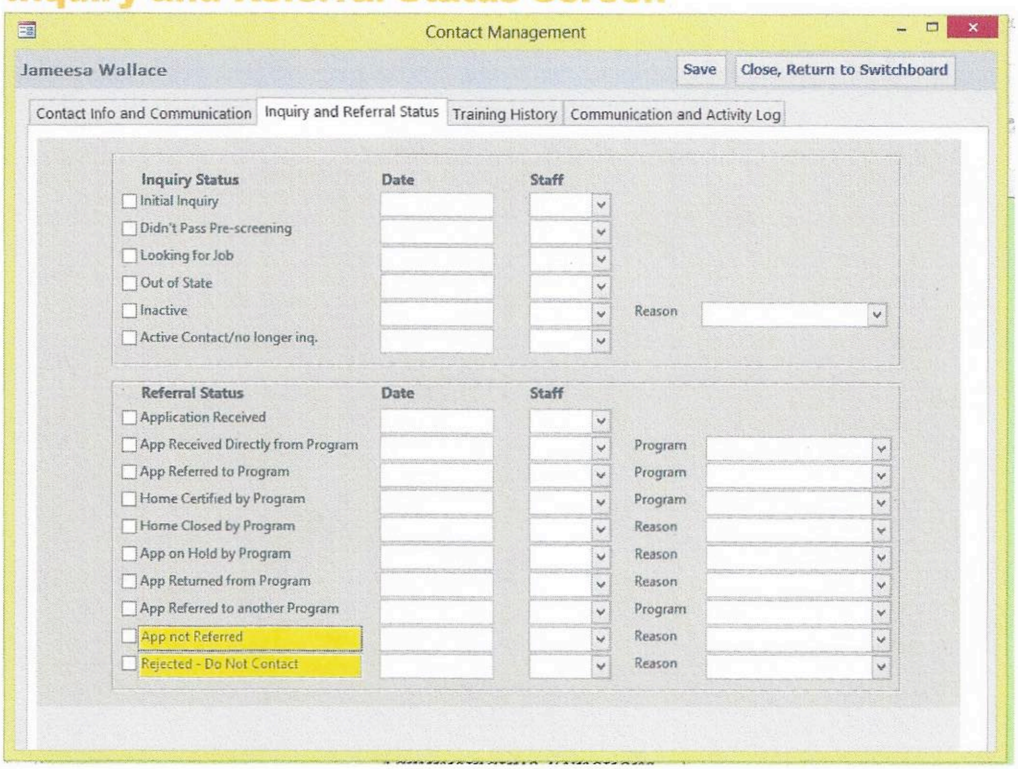


-make

____

____

Inquiry and Referral Status Screen



This screen is completely self-explanatory as far as data entry. There are check boxes, text fields, and drop-down menus.

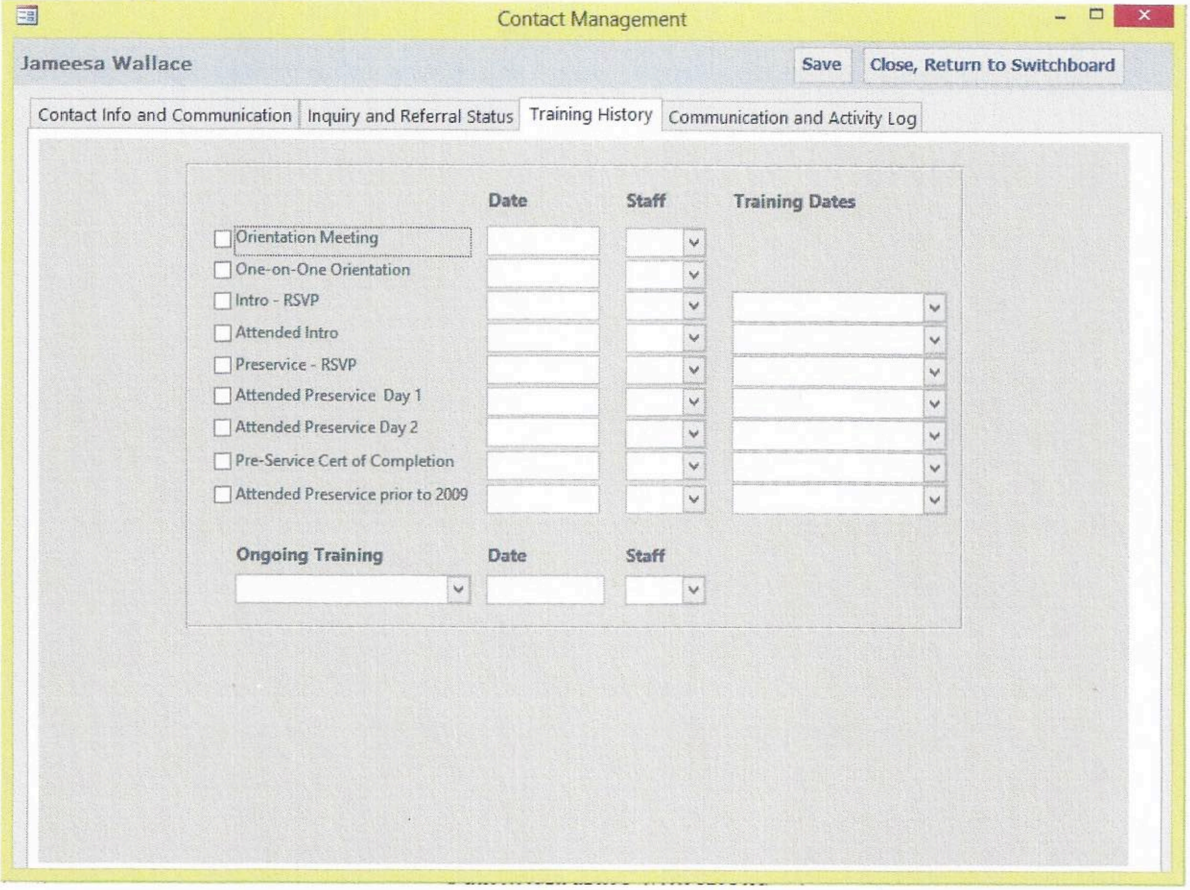
Exercises for the Inquiry and Referral Status Screen

- When would you click on "Active Contact/No longer inquiry?

- Enter in a new contact that has your first name and "Test" as the last name. The app came directly from Kerr on 1/01/13, was certified by Kerr Metro on 5/01/13, was closed on 5/15/13 due to them just dropping off the kid at Kerr. Try inputting all that info into this screen.

- You notice that the person is red-flagged but that is not reflected on this screen. What would you do?-

Training History Screen



This is a brand new screen. We had nothing like it in the original database. It is fairly self-explanatory, except for the first date column. Basically, all Orientations, Trainings, Intro's, and Preservice are considered trainings and are to go in the training history here. We will have to do double entry and also write it in the Communication and Activity Log as some people come back and do it more than once and there is no way to notate that here.

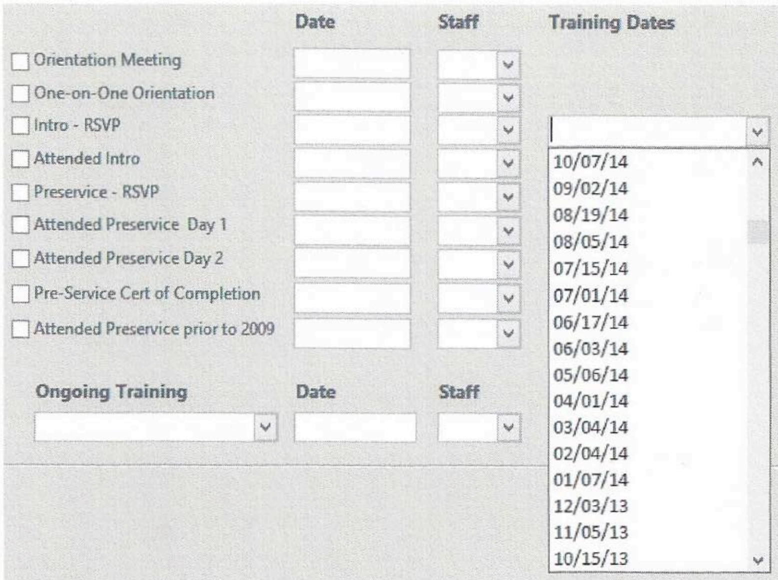
- Orientation Meeting: If they attend one, put a check in the checkbox, put in the date attended under "Date" and your first name under "Staff".

- One-on-One Orientation: If you do one, put a check in the checkbox, put the date you did the one-on-one under "Date" and your first name under "Staff".

- Intro RSVP: If they RSVP'd for Intro, put a check in the checkbox, put the date they RSVP'd (like today) under "Date" your first name under "Staff", and click on the drop down menu under "Training Dates". All the future Intro meetings are listed through 2014, with 2014 first, then the last three of 2013, then the whole list of 2015. Select the Intro for which they RSVP'd. (See the list below).

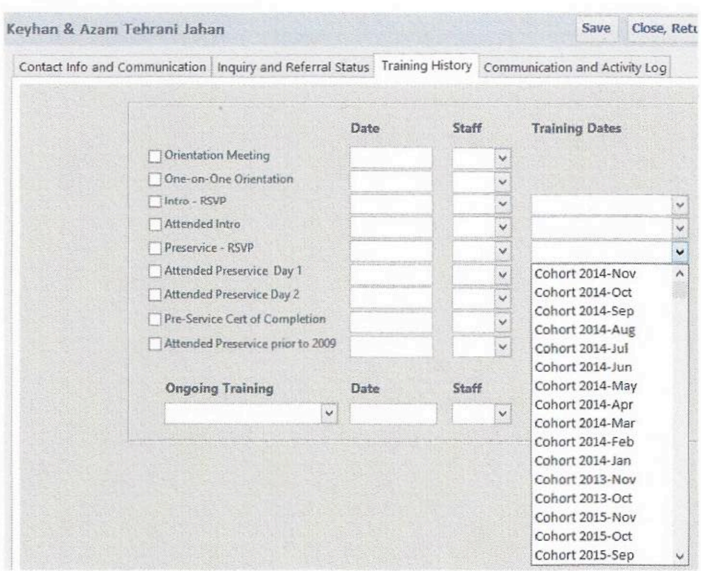
Known Issues

The Ongoing Training line is not yet operational. Please just ignore it for now.

- 

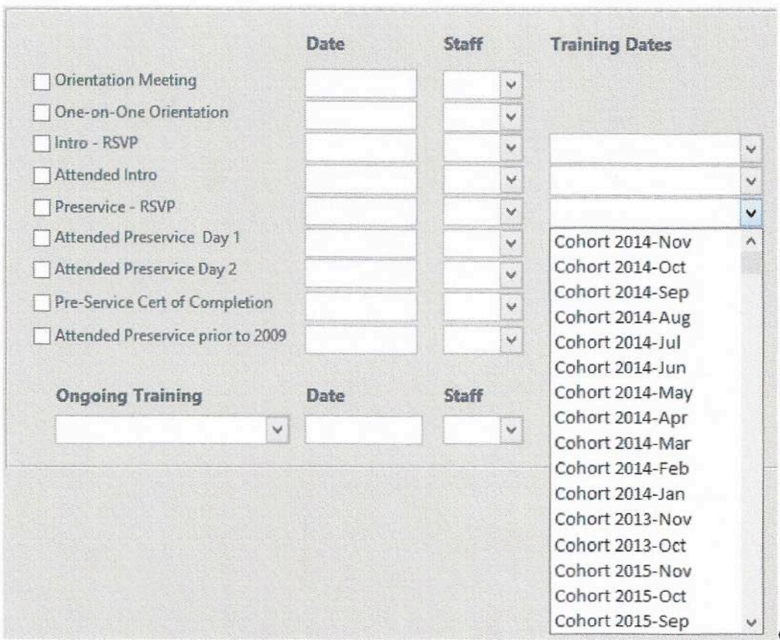
- Attended Intro: Once they have actually attended an Intro, then you put a check in the checkbox, ignore the date column (unless you feel like entering today's date –it's not necessary but we have done it both ways while doing data entry), and then click on the drop down menu and select the correct date. Just as with the Intro RSVP, all the Intro dates are in through 2015.

- Pre-service RSVP: You would handle this almost exactly like the Intro. , put a check in the checkbox, put the date they RSVP'd (like today) under "Date" your first name under "Staff", and click on the drop down menu under "Training Dates". The drop down menu will have a list of cohorts by year and then by month. Select the appropriate date. (See below).

- 

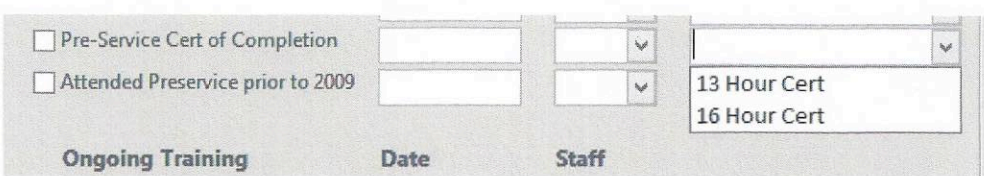
- Attended Pre-service Day 1: Once they have actually attended the first day of Pre-Service, then you put a check in the checkbox, ignore the date column (unless you feel like entering today's date –it's not necessary but we have done it both ways while doing data entry), and then click on the drop down menu and select the correct date for the first day of the training.

- Attended Pre-service Day 2: Once they have actually attended the second day of Pre-Service, then you put a check in the checkbox, ignore the date column (unless you feel like entering today's date –it's not necessary but we have done it both ways while doing data entry), and then click on the drop down menu and select the correct date for the second day of the training. (See below). Remember, you are not quite done if they have completed their training!



C

- Pre-service Cert of Completion: If they completed the training (with or without Intro), they will receive a certificate of training for either 16 hours (with Intro) or 13 hours (without Intro). You will need to notate this. Put a check in the checkbox, **<u>ENTER IN THE DATE THEY RECEIVED THE CERTIFICATE</u>**, and then select either 13 Hour or 16 Hour Certificate from the drop down menu.

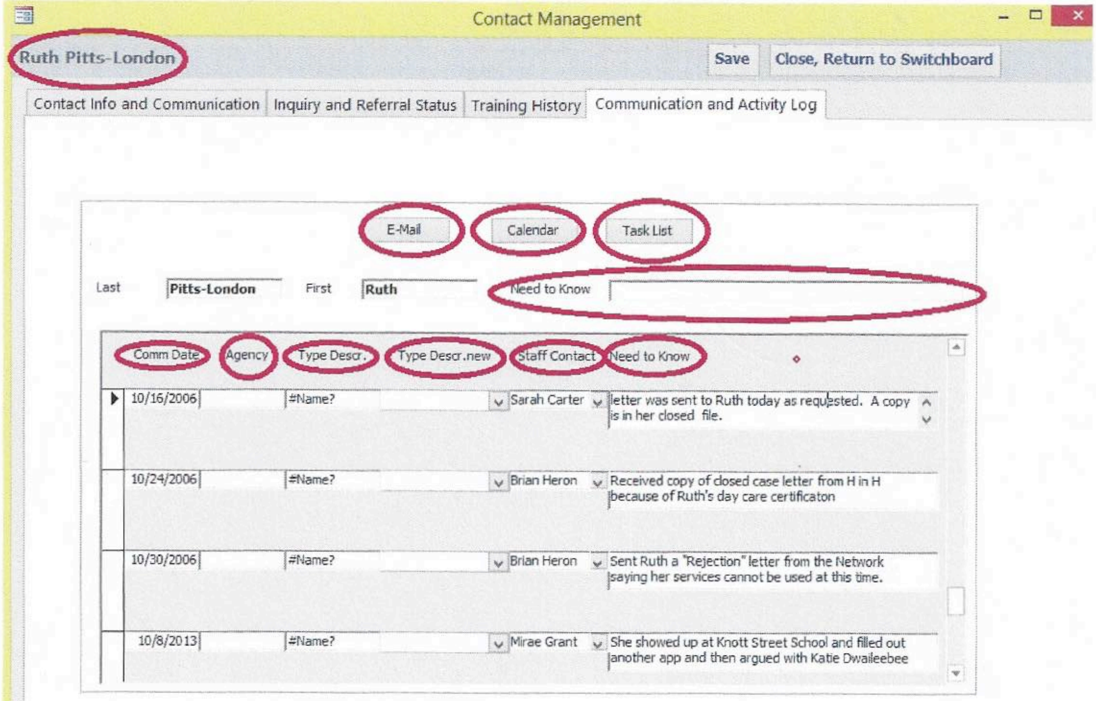


- Attended Preservice Prior to 2009: We are not going back more than four years and entering in past training data. You can either look in the original database, or look in the handwritten

Exercises for the Training History Screen

- ☑ Do you think that you need to uncheck the box for "RSVP" for either Intro or Pre-service it they attend? What if they don't attend?

Comication and Activity Log Screen



This screen looks and acts much the same as it did in the original database. It should – we just copied it over. There are, however, some changes.

- The buttons for "Email", "Calendar", and "Task List" are not yet operational.
- Need to Know: (The one directly to the right of the first name).This is subjective. You can leave it blank or add in some info. I suggest always adding in a date so we know if what we needed to know is current.
- Comm Date – this should auto-populate as today's date.
- Agency – Ignore – we don't use this. We will delete this column in the future.

Known Issues

- Type Descr. and Type Descr.new – just ignore for now. You can just tab on through. They are not working (see Known Issues above).

- Staff Contact: Since the rest of the database now has us putting in our first name first, this has us putting in our last name first. I don't want to talk about it. Let's just go with it.

- Need to Know (the header for the column to the right of "Staff Contact": This should be and will be one day named, "Notes/Log". For now, we are just going to understand that that is what this means. This is where we leave our notes.

  - For EVERY new inquiry, we MUST write "Initial Inquiry" in this log with the date of inquiry. It used to do it automatically for us. It now doesn't..

Exercises for the Communication and Activity Log Screen

- Look up Keya Bhattacharyya. Though her other screens aren't populated, what can you gather about her? How would you respond to an inquiry from her?

- Try entering something in either Type Description fields. What happens?

- Try typing something in the Agency field. What happens?

- Go to your name and add in a line that you are now working for FFCN. Date it for the closest you can to your start date.

Another major known issue is the Type Descr. and the Type Descr.new. As you see in the above example, the only data that displays under "Type Descr." is "#Name?". This is an error. It is actually better than what was happening previously. There is a glitch here. When we tried to adjust this column to add in more items in the drop down menu, it froze. So, we added a new "Type Descr.new" column. Now, we can see the drop down menu, but we still can't use it! For the time being, leave it blank. Manually write what you are doing (initial inquiry, email, left message, sent packet, etc..) in the same row's Need to Know column. And yes, that second "Need to Know" column should be labelled "Notes". Every time we touch this screen, it breaks. Finally, not all information that was in here transferred over. We are missing some of 2012 and most of 2013.

Know your limitations
then defy them.

Section

4

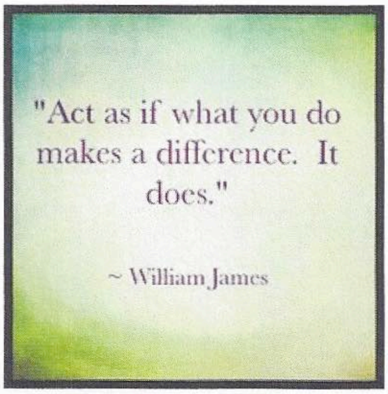
Email Reminders

"Every accomplishment starts with a decision to try." – Unknown

This function is not currently operational. We will update in future revisions.

RED – FLAG

ercises



Section

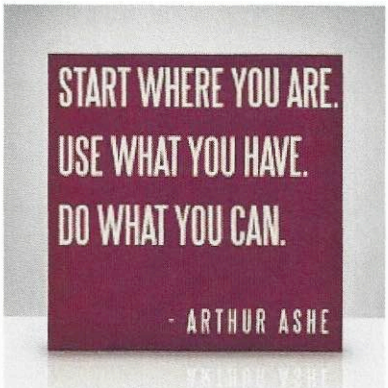
5

Reports

"Bear in mind that your own resolution to succeed is more important than any other." – Abraham Lincoln

This function is not currently operational. We will update in future revisions.

ercises



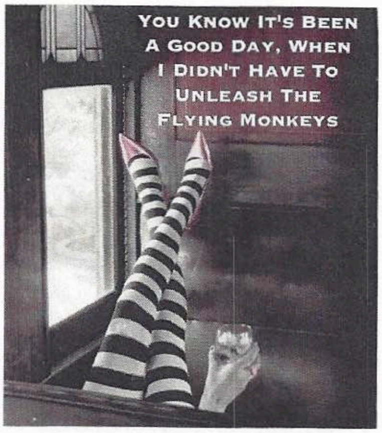
Section
6

Administrative Functions

"The only way around is through." – Robert Frost

This function is not currently operational. We will update in future revisions.

ercises



Section
7

Known Issues

"Hire character. Train skill." – Peter Schutz

The following are known issues that will be addressed in upcoming updates. If you come across an issue that is not addressed here, please email Mirae with the specifics of what you were trying to do and what happened. Taking a screen shot of error messages really helps. Just press the "Print Screen" button on your keyboard when the error message or the issue occurs. Then, open a Word document and press the "Control" and the letter "v" keys at the same time and the screen shot will paste into the word document. Save it and attach the file to your email.

Known Issues

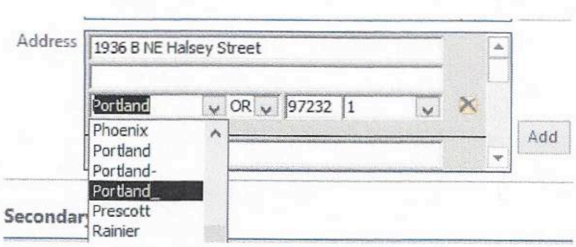
Log In Screen:

- Only have active people in the list to log in.

Contact Info and Communication Screen:

- We moved the communication tab and didn't re-label the "Contact Info and Communication" tab. It should be titled "Contact Info and Search".

- In the Cities drop down menu, there are three listings for Portland.

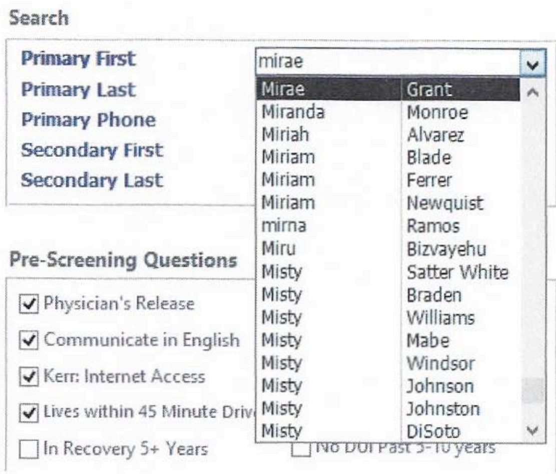


• zip county.

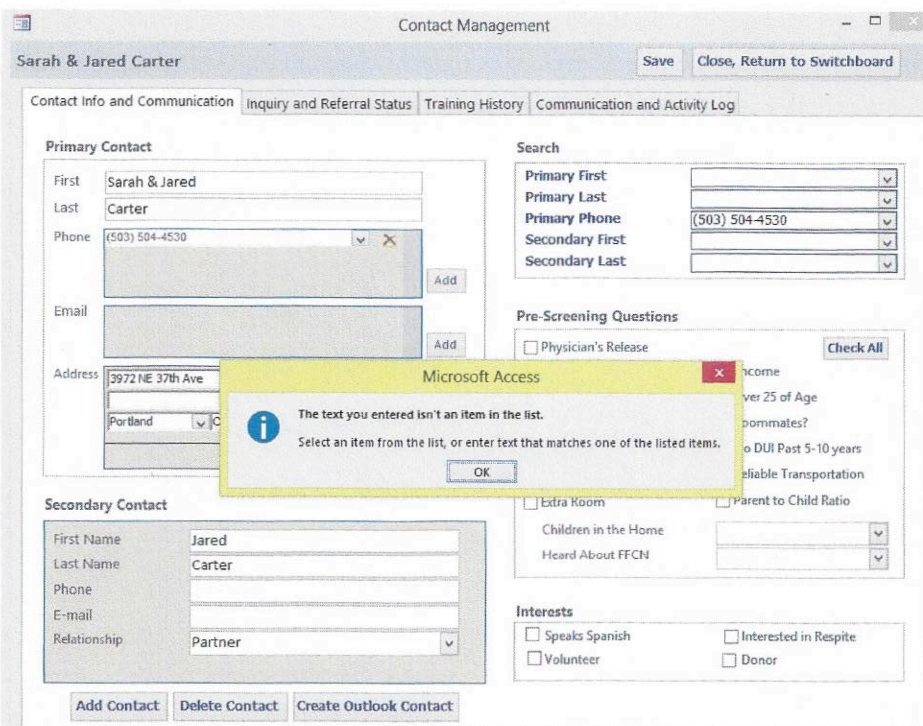
- Search Function: We need to be able to search by the last or first name first, then have the secondary name (first or last) that is attached be in alphabetical order.

• counties — duplicated -

• unknown
• outside our area.



- In the Search Section, when you search by phone number, sometimes, no matter what you do the phone number won't populate. For example, Sarah and Jared Carter's phone number is 503-504-4530. When I tried to search by that number, I received the following error message:



You can see that the number is in their contact information, but you can't search by their number. I went and deleted their number, added it in again, exited out of the system and logged back in and the number still won't populate.

- When you search by phone number, the list should be sorted numerically.

– address – delete, do overwrite.

- The "address" field is confusing – there are no labels. We can figure out the address line, the city, and State and Zip, but there are two boxes after that make no sense. Why is there the small box after Zip? After that box is a drop down that has the County. How can we make this clearer?

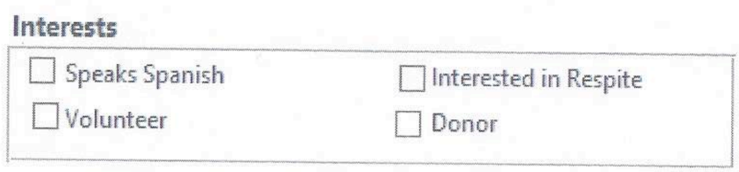
- Fix the "Create Outlook Contact" button.

- Fix it so that the Secondary Contact doesn't disappear when you tab through the fields.

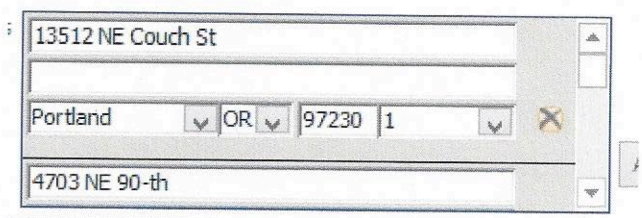
- Fix the functionality of the email field so that when you click in the field, the cursor will automatically be at the beginning of the field, not somewhere in the middle.

- Heard About FFCN: ClassifiedAds.com needs to be put in alphabetical order. The only one not in alphabetical order is Craigslist, which is on top.

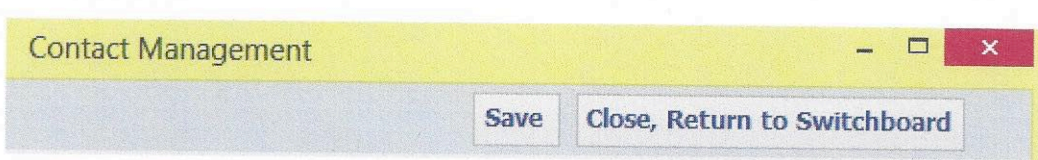
- Align the check boxes in the "Interests" section.



- Delete the extra line in the Address under Primary Contact (in the example below, it's the one with the "4703 NE 90-th" in the field.



- At the top left, the button that is labeled "Close, Return to Switchboard" should be renamed "Close, Return to Main Menu".



- There is an inputting issue. If entering in multiple inquiries, sometimes the phone number or email populates from the previous entry. If you change or delete it, it changes or deletes it from the previous entry, not the current one. For example:

    - Added Latrese Bard as a new contact, including adding her phone number 503-839-1399. Then, added a new contact – Melody and Heiner Wagener. When I click on "add" under the phone number, Latrese's phone number of 503-839-1399 populates. I deleted that phone number and added in Melody's correct phone number of 503-245-4212. I exited all the way out of the database and Access and log back in. I search for Melody Wagener and there is no phone number listed. I search for Latrese Bard, and the only number listed is Melody's number 503-245-4212. I edited Latrese's number and changed it to the correct number. I searched for Melody and added a new phone number of 503-245-4212. So it is now fixed.

- Pamela Grant's name was already in the system, but without an email address of pgrant3@gmail.com. I added that in. Then I added Stacey Unknown and clicked on 'add' under email. Pamela Grant's email showed up. I didn't delete Pam's but added Stacey's email. Saved. I exited all the way out of the database and Access and logged back in. I search for Pam Grant – both Stacey and Pam's email are there. I search for Stacey – no email at all. I fixed this.

Inquiry and Referral Status Screen:

- The "Initial Inquiry" checkbox, today's date, and the staff should auto populate when a new contact is added into the database.
- We need to add in a yellow "Inquiry Rejected" line.
- If at all possible, we need the date and the staff to auto populate to the default of today's date in all fields when we check the check box, like they do on the Communication and Activity Log screen.
- You input staff by first name on all screens except the Communication and Activity Log, when it is by last name. This should be consistent. Only active staff members should populate this list.
- For "Inactive" status, we need to rework the drop down menu for "Reason".
    - We need to delete any that are already on the screen (didn't pass prescreening, out of state, looking for a job).
    - Delete "Looking for info/not looking"
    - Change "Other" to read "Other: See Notes".
    - Change "Withdrawn by Applicant" to "Withdrawn by Contact"
- If "didn't pass prescreening, out of state, looking for a job" are clicked, then the "inactive" check box should automatically be checked with that day's date and staff autopopulating from log in.
- Referral Status Section: App Not Referred: The drop down menu is not long enough to read the whole line:

• programs – make "inactive" Micasa LT-TFC

- Referral Status Section: Rejected - Do Not Contact: The drop down menu is not long enough to read the whole line:

-

Training History Screen:

- The Ongoing Training section only allows for one training to be input. We need this to be a log of multiple trainings over time.

- The "Date" column and the """Training Dates" column aren't clear. Needs work.

Communication and Activity Log Screen:

- The first line on all contacts on this screen should autopopulate when a new contact is created that has today's date, the staff who logged in, "Status" as "Inquiry" and "Need to Know" should have "Initial inquiry. Emailed packet."

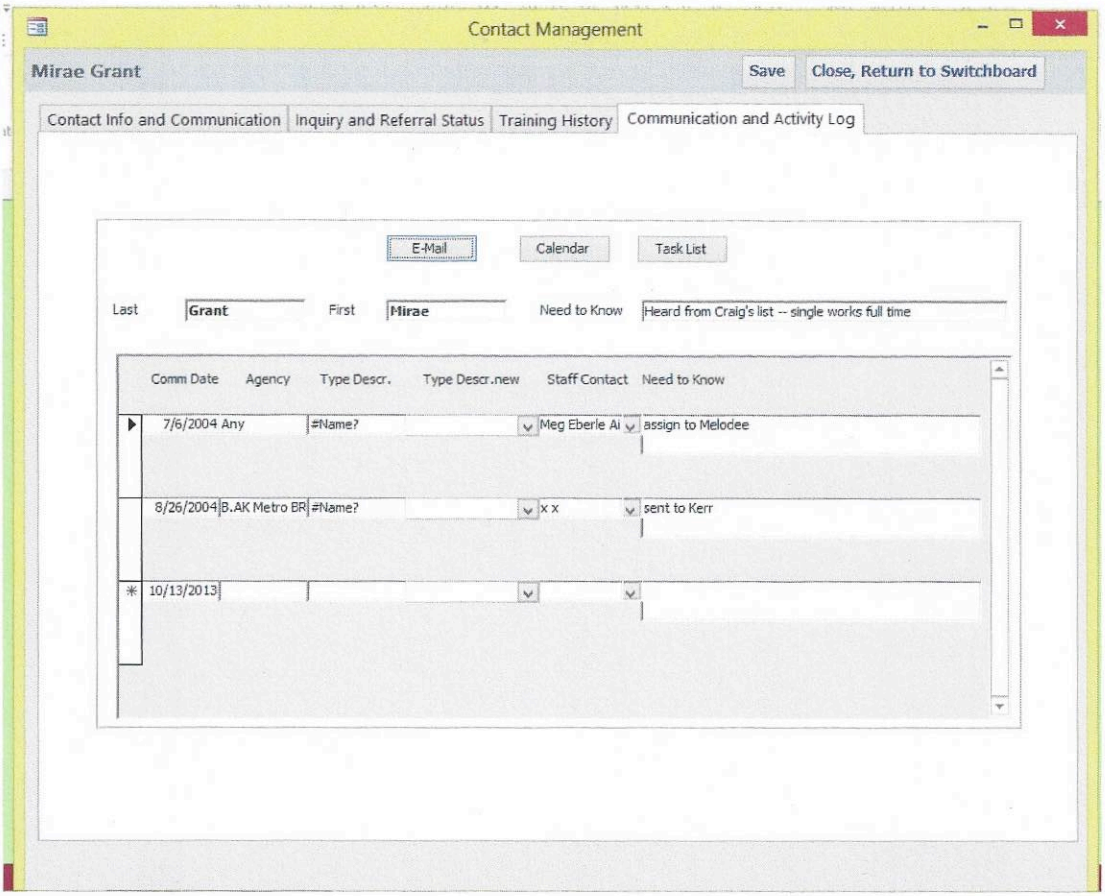
- Change "Need to Know in the body to "Notes/Log".

- Delete the "Agency" column.

- Fix the "Email" button.

- Fix the "Calendar" button.

- On the Communication and Activity Log: There are now two columns with "Type Descr. The first autopopulates #Name? and can't enter anything in. The second, Type Descr.new has a drop down menu, but when you drop down and highlight an item to select it, it won't select. See below


Contact Management
Mirae Grant
Save
Close, Return to Switchboard
Contact Info and Communication
Inquiry and Referral Status
Training History
Communication and Activity Log
E-Mail
Calendar
Task List
Last
Grant
First
Mirae
Need to Know
Heard from Craig's list -- single works full time
Comm Date
Agency
Type Descr.
Type Descr.new
Staff Contact
Need to Know
7/6/2004 Any
#Name?
Meg Eberle Ai
assign to Melodee
8/26/2004 B.AK Metro BR
#Name?
x x
sent to Kerr
10/13/2013

"Pretend that every single person you meet has a sign around his or her neck that says, 'Make me feel important.' Not only will you succeed in sales, you will succeed in life."

-Mary Kay Ash

Section

8

No Name - Unknown Unknown.

Protocols for Entering Inquiries

"The question isn't who is going to let me; it's who is going to stop me." – Ayn Rand

We are finally ready to input Inquiry forms. Because our goal is to go paperless with Inquiry forms by January 1, 2014, we will have to change our protocols for how we enter inquiries and what inquiries we need to enter and what inquiries we don't. Many ways we enter have stayed the same, but several points of entry are radically different. This section is intended to be as comprehensive as possible, but there is always one more exception to the rule…

RED FLAG - 3 places - 1st Name, Inquiry status, Comm. Log - Need to know

Hints and Tips

I always keep both the Revised and the Original databases open while working – that way I have it when I need it, and I almost always need it!

A phone call, email, carrier pigeon, or other form of inquiry comes in. The following is how to proceed.

- Open the Revised Database when you open your email and keep it open. At the office, there are two screens. I have the database showing on one and the email showing on the other. Copy and paste from the emails into the Communication and Activity Log – it makes it so much faster!

- For EVERY inquiry, you must search to see if it is already in the database. Don't just search by one name if you can't find it. Search by both names and phone number

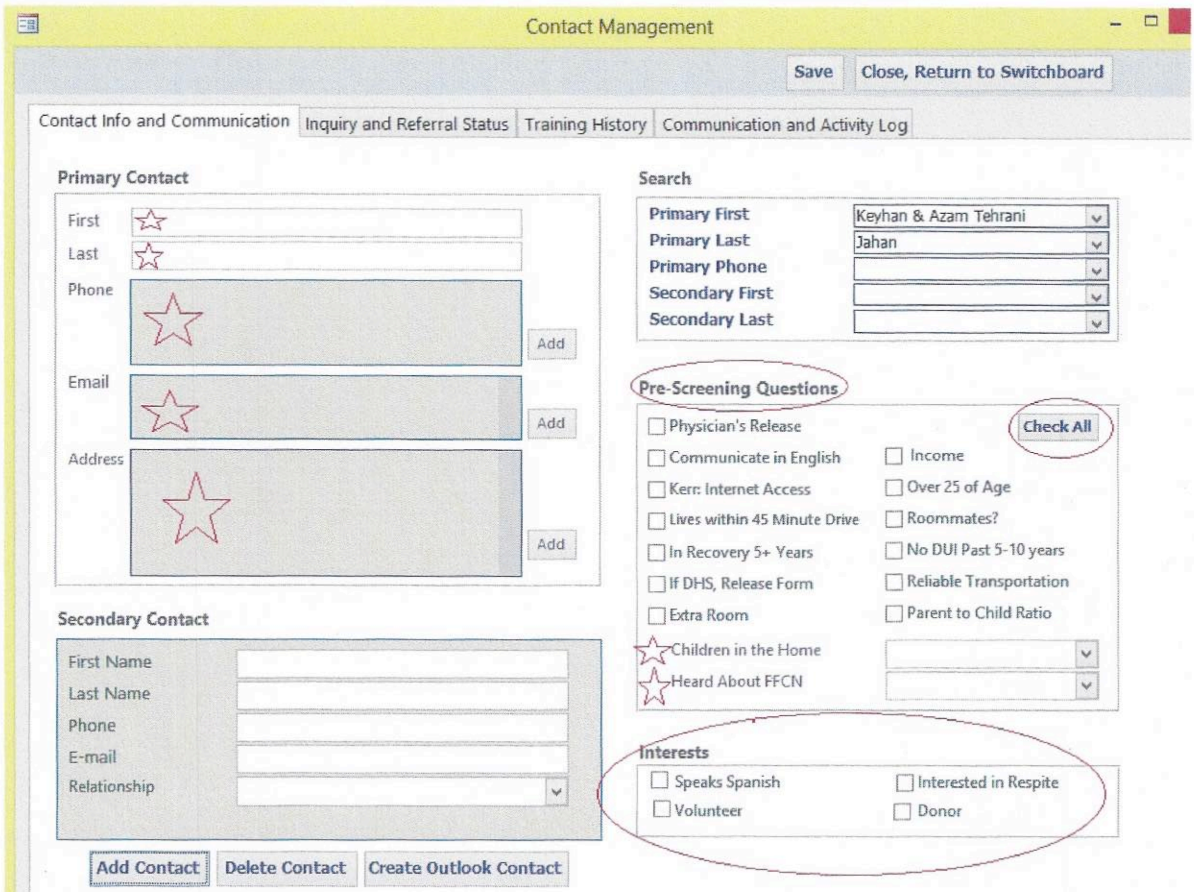
  - If it is not in the database, follow the protocol for adding in a new entry.

  - If it is in the database: read the Communication and Activity Log and on the Inquiry and Referral Status Screen.. Look them up in the Original Database if you need to.

    - If there are not red flags, follow the protocol for updated an entry.

    - If there are red flags, follow the protocol for that..

Protocol for Adding New Inquiries:



Go to the "Contact Info and Communication" tab.

Remember, Spanish naming conventions are very different. Be sure to read how to input them!

- First, do a Search and make sure that it is actually a new inquiry.
    - Click on "Add Contact".
    - Primary Contact Section:
        - First: Type in the first name of the contact, first letter capitalized. If it is a couple:
            - And they have the same last name (or a hyphenated last name), put both first names separated by an "and", for example, Mary and John (under first name – with Mary going first since she is the one who called) and Smith under the last name. <u>YES, you still put the second contact under secondary contact.</u>
            - And they have different last names, enter them separately.

Known Issues

Sometimes there is an errant field as a fourth line under the address. Just ignore it.

- Be aware that Spanish naming conventions are very different from English. Many times their names are their given first name, their father's last name, and their mother's last name, so Carmen Ortiz Velasquez. She would probably go by Carmen Ortiz, but enter Carmen under the first name and Ortiz Velasquez under the last name. This gets even more complicated if they are partners. So, it would be primary contact Carmen Ortiz Velasquez and secondary contact Juan Quintero Lopez. On the application, they might call the family name Quintero/Lopez or Lopez/Quintero. For our purposes, let's just keep them separate.

  - Phone: primary contact's primary phone number. You can add in as many as you need. Just keep clicking on "Add".

  - Email: primary contact's primary email. You can add in as many as you need. Just keep clicking on "Add".

  - Address: The first line is the street address. If you need more room, go to the second line. Then add in the city, the state, the zip code, and the county (you MUST fill out the county Write in "Unknown" if you don't know..

- Secondary Contact Section:
  - First Name: See above.
  - Last Name: See above.
  - Phone: secondary contact's primary phone number. You can only add in one phone number here.
  - Email: secondary contact's primary email. You can only add in one email address here.
  - Relationship: It helps to know their relationship, if you know it.
- Pre-Screening Questions Section:
  - For all the questions with a check box: You can click each box one by one, or click, "check all" and unclick any that don't apply.
  - Children in the Home: Let's try and fill this out if we can.
    - Leave blank if you don't know.
    - The numbers for number of children in the home go from 0 (zero) on up.
  - Heard About FFCN: You MUST fill this out. If you don't know, click on "Unknown". You can see the whole list below in the screen shot.

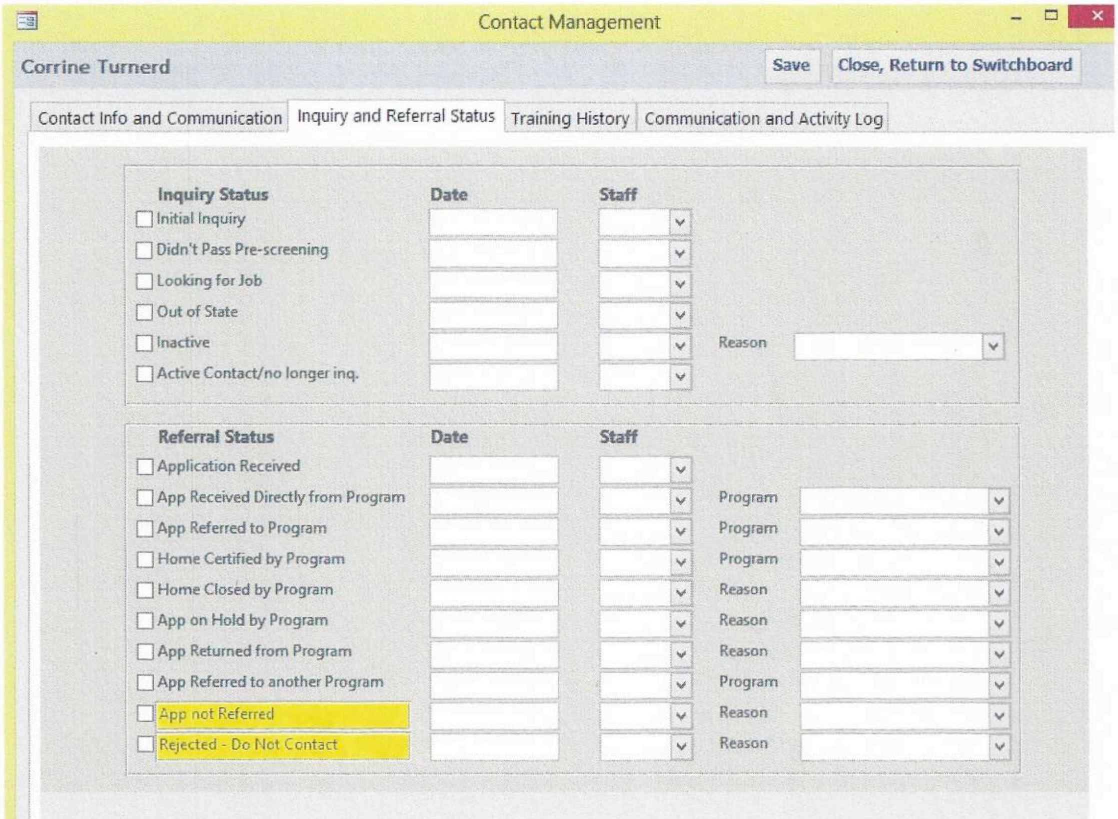
- Interests Section: This is where we put those things that we couldn't find a place for anywhere else. You can click on these (or unclick) as it changes. You can click on one or any number of them.
  - Speaks Spanish
  - Interested in Respite
  - Volunteer
  - Donor

WAIT YOU ARE NOT DONE, SAM I AM,

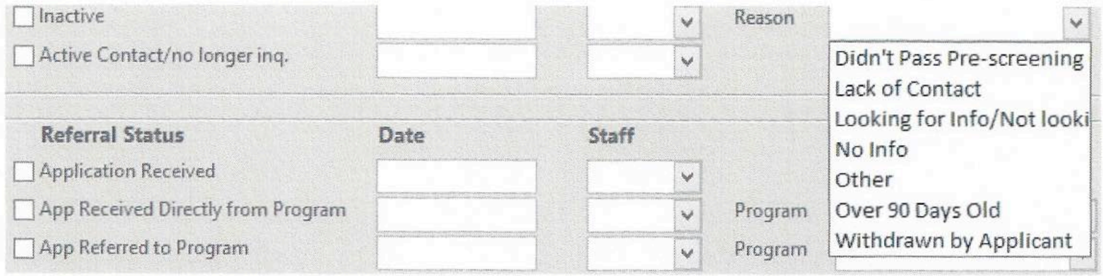
NOT DONE AT ALL!

Do not be fooled because you are done with this screen – you have two more to go!!!

Now, click on the "Inquiry and Referral Status" tab.



- Inquiry Status Section:
  - Initial Inquiry: FOR EVERY NEW INQUIRY (or every inquiry who is now calling back after being made inactive), you need to check on this box, put the date of the inquiry (the day they called or emailed) and your first name. YOU MUST CLICK THIS BOX in order for this to count as an inquiry for the month on our reports. If they called, no matter what happens to them, you must click on this box.
  - Didn't Pass Screening: Click on this box if they didn't pass the prescreening questions AND BE SURE TO CLICK ON THE INACTIVE box. If you click on this box, when you click on the "Inactive" box, you don't need to add a reason.
  - Looking for Job: Click no this box if they are looking for a job AND BE SURE TO CLICK ON THE INACTIVE box. If you click on this box, when you click on the "Inactive" box, you don't need to add a reason.
  - Out of State: Click no this box if they are from out of state. AND BE SURE TO CLICK ON THE INACTIVE box. If you click on this box, when you click on the "Inactive" box, you don't need to add a reason.
  - Inactive: You must click on this box if you don't pass prescreening, are looking for a job, are out of state, or this is no longer a contact we want to email. **Also, don't forget that you must also put in the notes in the Communication and Activity Log that you made them inactive and why**.



Known Issues

On the "Inactive" line, some of the Reasons in the drop-down menu are redundant. Ignore them.

If it's not one of the three above check boxes, then go to the Reason drop down menu, and click on one of the following:

- Lack of contact (this would be checked if we haven't heard from them in some time).

- Looking for info – DON'T USE THIS ONE. IT SHOULD HAVE BEEN COMBINED WITH DID NOT PASS PRE-SCREENING

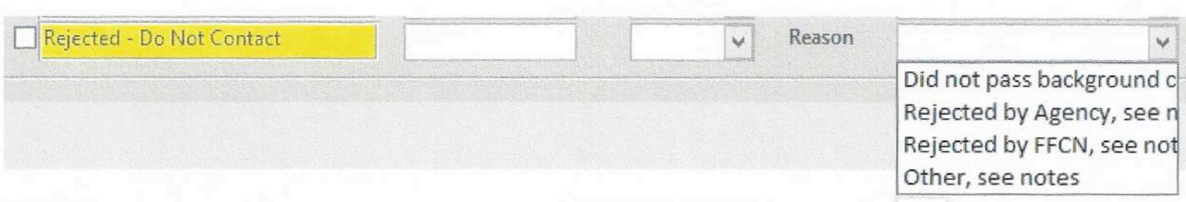
- No info – This is for when we get a name from Kerr or Morrison, and no other info and they never show and we have no way to get ahold of the contact.

- Other: Use sparingly and ALWAYS PUT A NOTE IN THE COMMUNICATION AND ACTIVITY LOG AS WHY THIS INQUIRY WAS MADE INACTIVE.

- Over 90 Days Old

- Withdrawn by Applicant (should be "Withdrawn by Contact"

- Referral Status Section: Rejected - Do Not Contact: there is only one item you might need in this section and that if for an inquiry that has been rejected by FFCN right away, one that absolutely we will not refer. JUST BE SURE TO PUT IN YOUR REASONING IN THE NOTES SECTION.

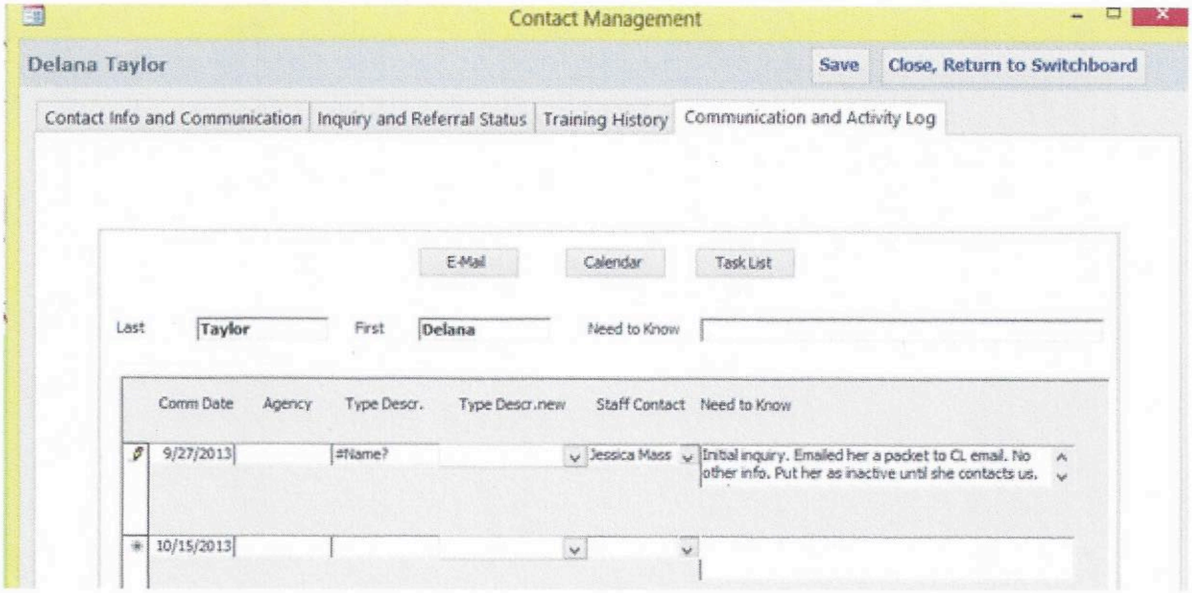


WAIT YOU ARE NOT DONE, SAM I AM,

NOT DONE AT ALL!

Do not be fooled because you are done with this screen – you have one more to go!!!

Now, click on the "Communication and Activity Log" tab

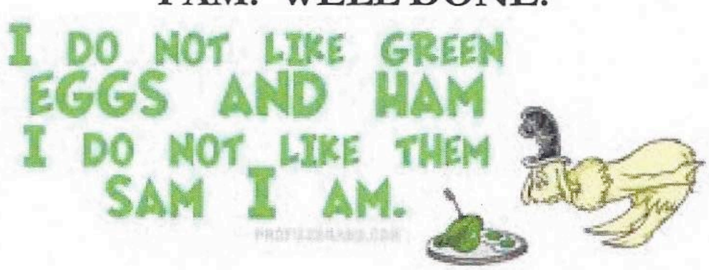


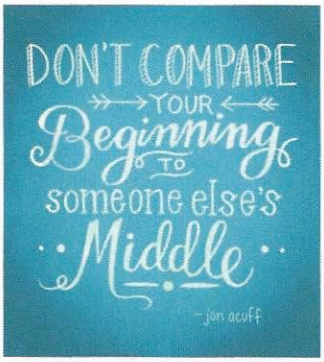
- For a New Inquiry: in the "Need to Know (should be Notes section in the body) ALWAYS write in INITIAL INQUIRY. Note that in the example above, we have no other information, so you can see that I made her inactive and this is the note we asked you to write from above.

- EVERY INTERACTION CONCERING THE CONTACT SHOULD BE NOTED IN THIS SECTION, from initial inquiry, to attended orientation, to RSVP's and reminder calls, to emails and phone call logs, to actual training attendance, to referrals, on hold, certs, and closures. It only takes a minute and it is really helpful later. This is the back up so we have a written history if we need it.

- Click on "Save". If you are done, click on "Close and return to switchboard and log out.

NOW, YOU ARE DONE ENTERING AN INQUIRY, SAM I AM. WELL DONE!





Section 9

Protocols for Entering in Training

"The big secret in life is that there is no big secret. Whatever your goal, you can get there if you're willing to work." – Oprah Winfrey

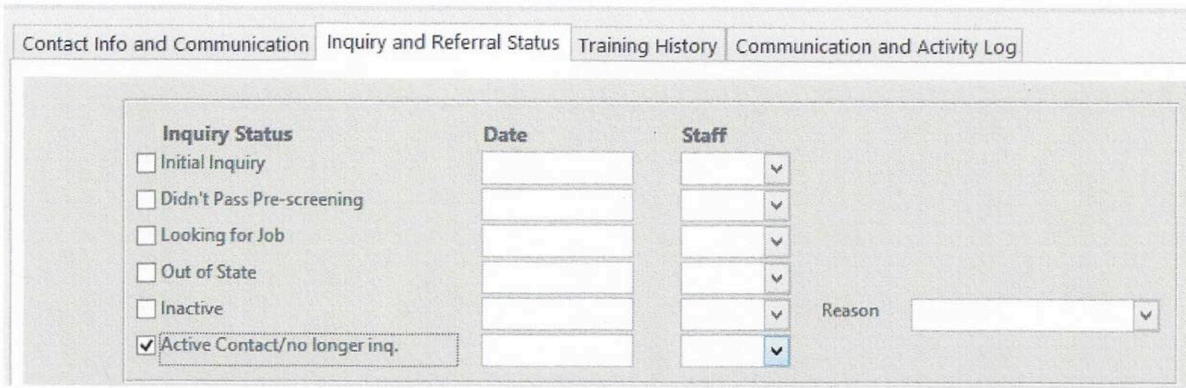
For purposes of this database, Orientation meetings, One-On-Ones, Introduction meetings, and Preservice training are cover in this section since they are now all on the same page.

Orientation Meetings

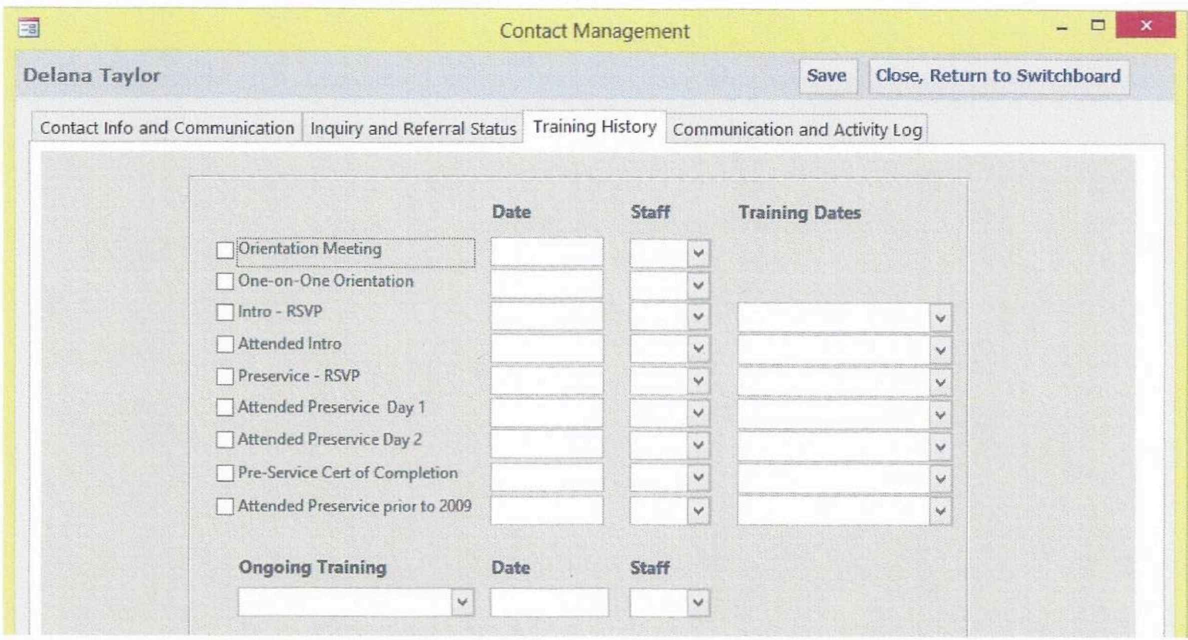
Protocol for entering in that an inquiry attended an orientation meeting or you conducted a One-On-One session, and RSVP for Intro and/or Preservice.

Go to the "Contact Info and Communication" tab

- Search for the contact who signed their attendance at the Orientation meeting. Look up first, last, and phone number.
    - If you don't find them, write up an Inquiry Form, then follow the above instruct ions for adding in an inquiry. Then, go to the next step.
    - If you do find them, then you will (hopefully) have more information to enter for their address, kids in the home, and how they heard about FFCN. Update that information.
- Go to the "Inquiry and Referral Status" tab. As they have now attended an Orientation, they are an active contact, meaning that we want to try and get them to Intro and Pre-service and we will no longer send them emails trying to get them to an Orientation meeting. Click on "ACTIVE CONTACT/NO LONGER INQUIRY", put in the date they were made active, and your first name as staff. If you don't make them active, we will never follow up with them for Intro and that would be unfortunate.



- Go to the "Training History" tab



  - Orientation Meeting: Check the "Orientation Meeting check box, put in the date of the Orientation meeting, and your first name.

  - One-on-One Orientation: Or, if you conducted a One-on-One, then put in that date and your name.

  - Intro – RSVP: Now, if they RSVP'd for Intro, check that box, put in the date of entry, your first name, and use the drop down menu to select the date of the Intro they want to attend.

  - Preservice – RSVP: Sometimes, they will RSVP for both Intro and Preservice at the same time. Awesome!! Now, we can notate that here. Just check the box, put in the date of entry, your first name, and select the month and year of the cohort they want to attend.

- If they didn't RSVP, why don't you give them a quick call and ask them if you can answer any other questions and see if you can get them to RSVP? That's just good recruiting!

• WAIT YOU ARE NOT DONE, SAM I AM,

• NOT DONE AT ALL!

Do not be fooled because you are done with this screen – you have two more to go!!!

- What do you think is next? Why the Communication and Activity Log, of course! Write a quick note that they attended Orientation or that you did a One-on-One, that they did or did not RSVP, and any other notes you have from communicating with them.

Now are you done, you ask?

NOT QUITE YET, SAM I AM!

- The final step, until further notice, is to go into the Excel Sheet for Intro RSVP's and put them in that list. If you don't we won't be able to follow up and we want to be able to follow up!

Now you are done,

Sam I Am.

Awesome work!

Intro

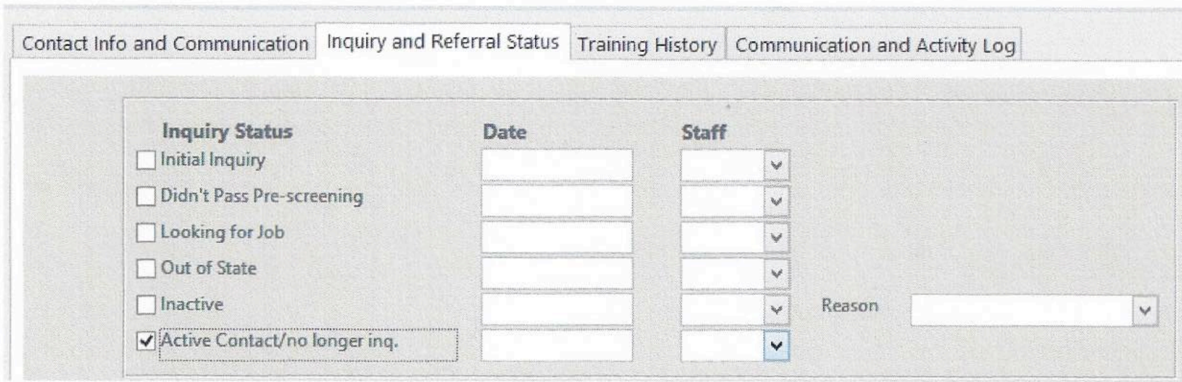
Protocol for entering in that a contact attended Intro or following up with a contact who RSVP'd for Intro but did not attend.

Go to the "Contact Info and Communication" tab

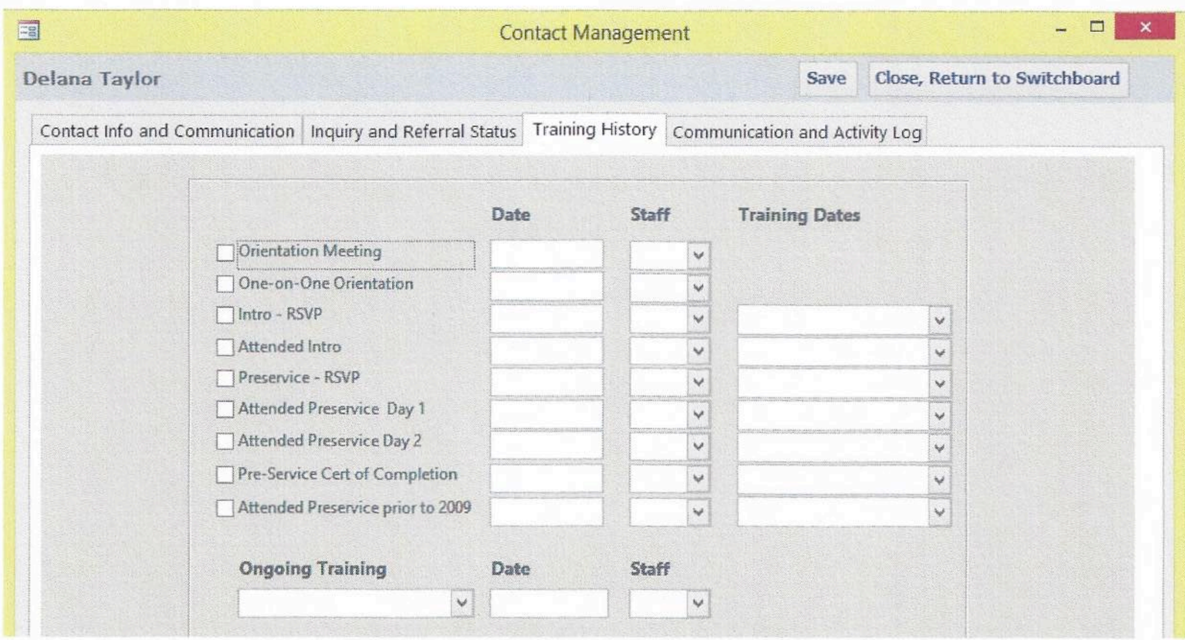
- Search for the contact who signed their attendance at Intro. Look up first, last, and phone number.
  - If you don't find them, write up an Inquiry Form, then follow the above instruct ions for adding in an inquiry. Then, go to the next step.

- If you do find them, then you will (hopefully) have more information to enter for their address, kids in the home, and how they heard about FFCN. Update that information.

- Go to the "Inquiry and Referral Status" tab. As they have now attended Intro, they are an active contact, meaning that we want to try and get them to Preservice and we will no longer send them emails trying to get them to an Orientation meeting or Intro. Click on "ACTIVE CONTACT/NO LONGER INQUIRY", put in the date they were made active, and your first name as staff. If you don't make them active, we will never follow up with them for Intro and that would be unfortunate



- Go to the "Training History" tab



  - If they Attended Intro:
    - Attended Intro: check that box, leave the date field empty, put in your first name, and under "Training Dates" select the correct date of the Intro they attended.

- Did they RSVP for Preservice? If so, enter that info. If not, call them and invite them!

- If they did NOT attend Intro:

    - Call them and try to get them to the next month's Intro.

    - Intro – RSVP: If they select another date to attend, check the RSVP'd for Intro box, put in the date of entry, your first name, and use the drop down menu to select the date of the Intro they want to attend.

- Preservice – RSVP: If they attended Intro and now want to RSVP for Preservice, just check the box, put in the date of entry, your first name, and select the month and year of the cohort they want to attend.

• WAIT YOU ARE NOT DONE, SAM I AM,

• NOT DONE AT ALL!

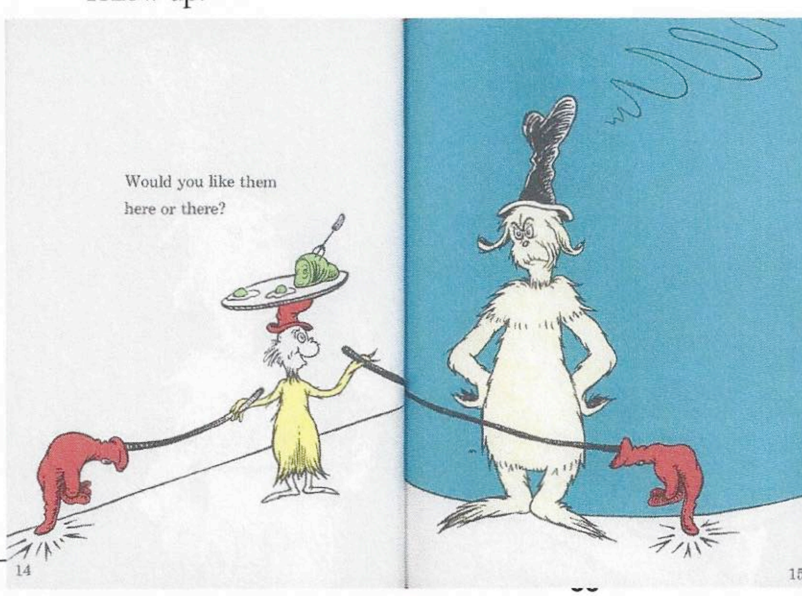
Do not be fooled because you are done with this screen – you have two more to go!!!

- What do you think is next? Why the Communication and Activity Log, of course! Write a quick note that they attended Intro or, that they did or did not RSVP, and any other notes you have from communicating with them.

Now are you done, you ask?

NOT QUITE YET, SAM I AM!

- The final step, until further notice, is to go into the Excel Sheet for Preservice RSVP's and put them in that list. If you don't we won't be able to follow up and we want to be able to follow up!



Now you are done,

Sam I Am.

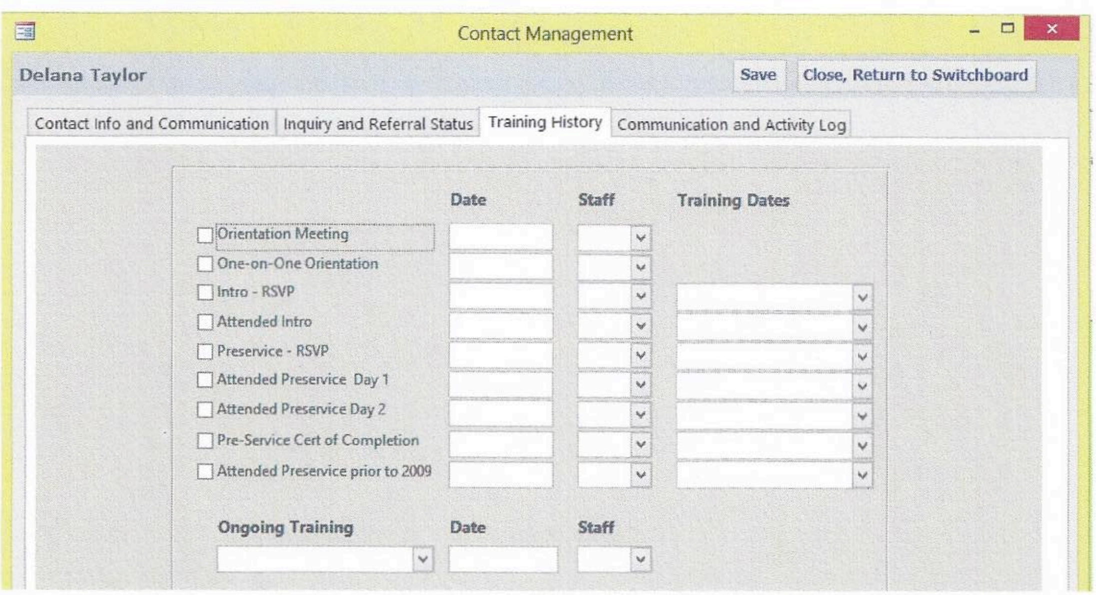
Way to Recruit!

Preservice

Protocol for entering in that a contact attended Preservice or following up with a contact who RSVP'd for Preservice but did not attend.

Go to the "Contact Info and Communication" tab

- Search for the contact who signed their attendance at Preservice. Look up first, last, and phone number.
    - If you don't find them, write up an Inquiry Form, then follow the above instruct ions for adding in an inquiry. Then, go to the next step.
    - If you do find them, then you will (hopefully) have more information to enter for their address, kids in the home, and how they heard about FFCN. Update that information.
- Go to the "Inquiry and Referral Status" tab. As they have now attended Preservice or RSVP'd for Preservice, they are an active contact, meaning that we want to try and get them to Preservice (if they have already finished, get them referred!) and we will no longer send them emails trying to get them to an Orientation meeting or Intro. Click on "ACTIVE CONTACT/NO LONGER INQUIRY", put in the date they were made active, and your first name as staff. Active in this situation, after they have been referred, means that they are still in process or have been certified as a foster provider.
- Go to the "Training History" tab



- If they Attended Preservice:
  - Attended Preservice Day 1 and Attended Preservice Day 2:: check those boxes, leave the date field empty, put in your first name, and under "Training Dates" select the correct dates of the training they attended..
- If they did NOT attend Preservice:
  - Call them and try to get them to the next month's Intro.
  - Preservice – RSVP: If they select another date to attend, check the RSVP'd for Preservice box, put in the date of entry, your first name, and use the drop down menu to select the date of the cohort they want to attend.

• WAIT YOU ARE NOT DONE, SAM I AM,

• NOT DONE AT ALL!

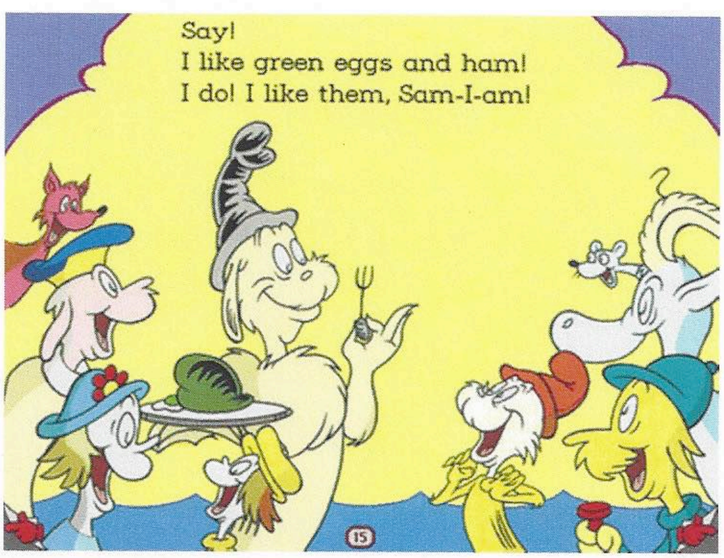
Do not be fooled because you are done with this screen – you have two more to go!!!

- What do you think is next? Why the Communication and Activity Log, of course! Write a quick note that they attended Preservice or, that they did or did not RSVP, and any other notes you have from communicating with them.

Now are you done, you ask?

NOT QUITE YET, SAM I AM!

- The final step, until further notice, is to go into the Excel Sheet for Preservice Final List and put them in that list. If they RSVP'd for a different Preservice, move them to the correct month.



Now you are done,

Sam I Am.

Great recruiting!!

"The achievements of an organization are the results of the combined effort of each individual." Vince Lombardi

Section 10

Protocols for Entering Referrals-Through-Closures-Data

"With practice, we can make the impossible possible, the possible easy, and the easy elegant, until what we once thought impossible becomes so effortless that to others, it looks like magic. – Andrea J. Lee

The following are the protocols for receiving the application, on hold, referring, applications returned, home certified, and home closed.. We will add to this section at a later date.

Applications/Referrals

Sdf

On Hold

Sdfa

App Returned

Asdflkj

Home Certified

Sdf

Home Closed

Sdfdas

Section

11

Index

"Now, get out there and kick ass!" – Stella McCartney

Please let us know if you would like more items added to the index.

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