DAD 2.0 Admin Intro Transcript

Matt Hayden: Welcome to the second prerequisite for the DAD administrator's training in St. Louis. My name is Matt Hayden and today I'll be walking you through a guide to the navigation and options available in the DAD 2.0 administrator's settings. The first option is to log in. Again, different from DAD 1.0 you do have to select an advocacy group and that advocacy group will stay associated with your computer. So if I would go to log in to another computer, the advocacy group would need to be selected again. If I were to log into that same computer again, it would remember the last advocacy group I have selected. Upon logging in with my user name and password, I'm brought to the DAD control panel. The DAD control panel is utilized to maintain your authentication and displays your major options, as well as your preferences available. Let me go ahead and select open administration. If you do not have open administration from the control panel, you are not granted the permission as the administrator. You will need to contact your DAD administrator to get that privilege associated with your log in if you feel it's appropriate. Selecting open administration does not close the control panel. It actually is open in the background and is a separate window that opens for the administration, which I am going to maximize. Navigation. First we have the notification that we are in our advocacy groups administration page. We have a series of mouse over menus for the administration of employees, funds, service request options, project options, local data options, which replaces the opening and closing questions found in DAD 1.0, and time keeping options. Every one of these is also clickable, so that you can view what falls from those mouse over drop down menus. For example if I were to click on the word employees, I now have a web page that shows up with all of the employee options. Clicking on the admin. will also bring you to a home page of the administrator module should you have an error in your configuration of your administrative module, this is where you will see it. What I'm going to do is go ahead and create an error to demonstrate that by removing one of the ethnicities that currently exists. Now when I select admin. to travel back to the admin. home page, I now have a warning that lets me know that the ethnicity, Alaskan Native, ethnicity unknown, is not mapped to anything locally and no user will have the ability to select it. I have the option to either fix or to ignore this warning. I also have the ability to view ignored warnings or all warnings.

Just a bit about the navigation. Should you have several warnings, you have the ability to sort by anything that's underlined, such as sort by the title of the section or sort by the warning. You also have the ability to hide any item that has the grid with the little red X which the text stipulates to hide that section column. You can click on that and that will highlight that from the grid and you can restore it by selecting the show all columns item. To fix the icon….the warning, just select the fix and it will take you to the ethnicity page. I can select new ethnicity and map Alaskan Native ethnicity unknown. With regards to the ethnicities, I'm also going to check off a box that says, includes options within education and training and outreach projects. And from active date, I'm going to back date it to make sure that it is usable for all service requests should someone edit it.

That brings me to describing the major difference between the admin. sections in DAD 1.0 and DAD 2.0. In DAD 1.0 you were able to activate and inactivate items via a check box and to note their active and inactive dates into text fields. In DAD 2.0, you stipulate an active date and inactive date and that controls whether or not an item is shown. For example, if you were to stipulate that a particular employee was to be active for a certain range of dates…and I'm just going to select myself. I'm getting rid of some of these columns here. And by default all columns are shown. You have the ability to, as I'm demonstrating, move them around here. I'm going to go ahead and hit edit. Now I have an active date and an inactive date. If I were to be an employee that was on a contractural basis and I had a set end date for my ability to utilize the DAD system, I could put that future date in and at the time in which I logged in to this system, will cease as soon as the future date hits. So just know that you do have the ability to put in explicit range on any item found in the administrative module and it will move with the date of which you're acting. So if I set an active and inactive date, as long as I'm logging in within that range, I will be able to log in. The same can be said for a funding source. If someone were to go in and to select a funding source and they wanted to select a local funding source that's no longer available, if they are creating a service request with an open date that is after the inactive date of that funding source, it will not be available for selection. So the inactive date and active date play a very key role and have to be very carefully selected when editing options found within the administrative module.

We're going to start with the first list of options. Advocacy locations is just like DAD 1.0. You have the ability to stipulate your main office and to put in the information associated with that and to create any satellite offices. Then you have summary view options. Summary view options are going to be the controlled view for clients, projects, and service requests that is not the detail views. So just like in DAD 1.0 we have a choice between a summary view or the detailed view. In DAD 2.0 you get to specify which particular data elements are going to be displayed on the summary view. You can actually stipulate to your employees, I want you to use the summary view because I have hand tailored this to be appropriate for our office. And you can check off by default any of the items that you want to show. When you first get into DAD 2.0, none of these items will be selected, so you will need to configure this with some core information just to start with. And you will need to configure it for clients, projects, and service requests, because they have different fields. You have to select it differently for all three.

Moving on to employees. With employees the first thing we have to do is set up security groups for those employees. The permissions that are associated with those employees…excuse me, with those security groups. The positions of the employees that they hold. Then to create the employees, provide employee assignment types. Employee assignment types is the listing of roles that an individual can have to be associated with a client, service request, or a project. And that particular role could…is determined by your office locally. It could be something as lead associate or lead attorney or supervising attorney, whatever role you want that particular individual to have when they're being associated. For example, when you assign an individual to a service request, you also select what their employee assignment type is and that drop down list is populated from this administrative module setting. Then you assign employees to security groups. Create teams and assign employees to teams. The first item I'm going to select, just to demonstrate, security groups and permissions, there is two ways to view these items. There is view by security group and select the permissions for each security group or you can view by permissions and select the security group that has that permission. So if you were to want to apply one permission across the board to all security groups, like for example view client records, if you wish to make sure that every security group had that, you could select view by permission, select all security groups, and save and then you know that every security group has that permission. Now on the flip side, if you wanted to view a security group and make sure that everyone that has the administrator's has every one of those permissions, you could select all permissions. It will highlight them all and then it will save that particular item to that particular security group. So just remember there's two ways to get it at it. You also have the ability to sort by anything that's underlined. You have the ability to hide columns. Say for example you weren't interested in seeing the permissions to get a shorter list on security groups, you could literally click on the X to hide that column or you could click on the show all columns to bring it back.

Moving on to the funds column. We have funding sources, which is going to be just a list of the federal funds mapped and any local funding sources. Should you want to have for one reason or another two CAP funding sources or two AT funding sources, you can map them back to the federal AT or the federal cap and they would function the same within the system. But you would need to map them back. It's not an advised option. We actually have a local funding source if I were to create it to utilize for that option. So if we were to say I have a local fund I would have the option to check off whether or not it's available for service request, whether or not it's available for projects and whether to include it in time keeping calculations. You also have the ability to create local funding sources that are used for projects that are administratively rolled as indirect cost allocation centers that are not included in timekeeping calculations so that you can bill things to be allocated later and are not included in the percent calculations on the time sheet. From the funds drop down list, we then go to the problems and the priorities and the objectives and the actions. Just starting with the priorities, just like you had in DAD 1.0, it's a list of the priorities that are available to your office. The next tier that has been developed in DAD 2.0 are objectives for priorities. So you have…you still have priorities in the system, but you have objectives that tie back to each priority. For offices that don't utilize objectives, you could create a redundant priority…excuse me a redundant objective that is the same as the priority. You just have to have one objective for every priority that exists and you can have an infinite number of objectives for each priority that exists. You then populate a list of actions just like in DAD 1.0, but instead of associating those actions with the priority, you associate them with the objective. So just the same as you had the extra tier in the priority and objective settings, you have the actions tied to the objectives instead of the priority. And just like you in DAD 1.0 associated funds priorities, you now associate funds with objectives.

Then we move down to problems and sub problems. This is going to give you a list of all the problem areas found in the application. This is based on all the problem areas that are found in the federal PPR's. You have the ability to create new ones and map them to a local defined option or to map them to something that already exists to create a more specific problem area. And then you also have a common list of all sub problems that are associated with every particular sub problem found on any PPR. Now by default I'm also going to highlight that these lists also have not selected in there. That is going to be a placeholder that we set as default so that when an employee comes in to log information, should they not select anything, not selected will remain their default response and it will allow you for quality control checks. Problems are then associated with those subproblems. For example, I'm going to hide the sub problem column just so we can see a little clearly. You have the abuse problem area, which then has a description that I just manually entered to give myself a reference to say that that's used by both PAIMI and TBI. I then have the ability to edit that abuse problem area and select all of the sub problems that I want to show up if an individual selects abuse. Now keep in mind, there is one more filter that is going to be applied to this list, which is sub problems to funding source. So you want to select all of the abuse sub problem areas in this list regardless of funding source and we will have materials for you to know which ones to check off to meet the federal requirements. Once you've associated all your sub problems with problems, you then associate the problems and sub problems with the funding source. So again, I'm going to close this column just so we get a better view. So okay for the CAP funding source, it has these associated problems and sub problems as available options to select. Then we select all of them that are appropriate based on the PPR, based on your local data reporting needs. Save those options and again we'll have documentation to allow you to know shorthand as to which to select and you also have the ability to sort by problems and sub problems or by funds. So keep in mind you can reverse the direction in which your doing this and say okay, I want to show by coercion which funding source it's associated with. Currently it's just PAIMI because that's currently the only funding source that has coercion as a sub problem to abuse. There's actually a coercion major problem area for TBI and it's in a different location. Again, it may be a little confusing when first trying to tackle associating problems with sub problems and then problems and sub problems with the funding source. We'll provide the training materials to list out which items link with which and to which funding source. Once you've selected your problems and sub problems, the rest of the items are literally maintaining the list and then associating with a funding source. So you have a list of AT device types and then you have those AT device types to funds. Now you'll notice in this particular drop down list, there is only one funding source. That is because the AT report is the only report that asks which AT devices should be associated with particular services that are provided. If other funding sources in the future start to prompt for this data element, we will add it there. Disabilities, there's a common list and then you associate those funds with disabilities. Intervention strategies, funds for those intervention strategies. Living arrangements, funds with those living arrangements. Priorities, objectives, actions, funds with objectives, objectives with actions, outcomes, and then you tie those funds to the outcomes. There's one more where you associate those outcomes with problems. Now due to the fact that PAIMI has different outcomes based on the problem area you have selected, you then have to specify which outcomes are available to each problem area. Now for most problem areas that are non PAIMI specific, you can just go in and say okay, all of the outcomes that are available are available to all these problem areas. But for the PAIMI outcomes, you have to make them specific to the abuse, to the neglect, and the other rights violations….I believe it's called rights violations. And so when we go to edit those particular lists, they are just going to have the PAIMI outcomes listed as particular options and also any other outcomes that are available. This is done just so that when you go to create a service request and when closing that service request, you go to select an outcome, based on the funding source you chose, based on the problem area you chose, based on the outcome compared to the active and inactive date that's available, you will then see a specified list that is funding, problem source, and date relevant specific to the individual when recording that particular piece of information. Again, this is a little complicated and we will have resources available at the training as to which outcomes fall where with regards to the PPR's and to be honest, we use the PPR's as our guide. We just open up the PAIMI PPR and took the wording, put it into the system and map it appropriately. Once we've associated all our items with all our funding sources, we then have the ability to go in and select a list of publications. Those publications we then create and associate with which funding sources are going to be available to these particular publications. What that means is that if I were to create a service request or a project that had these associated funding sources, then these publications would show appropriately. So if I only had one publication available on CAP and three publications available on AT, I would only have the ability to track publications to that one publication should I have selected CAP and to all three if I selected AT just based on my choices. Just for this demo model I have them all selected.

Moving onto service request options. We have accommodations which are the listing of the items that the individual may require to do business with you such as Braille or assisted listening device or something along those lines. Contact types, this is where you create your contact types for the particular service requests and project and client type options. By default, I have adversary, caller, guardian, primary contact, and refer. And I have those assigned for example, adversary is assigned to the client…excuse me is assigned to the service request only. And is not associated with the client or the project but I do have the choice to do so. I also had the ability to specify in which order the particular contact is going to show. Keeping in mind that all of these contacts are used for our desktop search and for our conflict of interest checks that we run within the system so we get to decide if we want a contact associate with our projects short of employee associations, as well as contacts associated with our client and service requests. The SR display order of 30 I have selected is because when I created my contacts, I set them in the order and I only have three for service requests as 10, 20, and 30 in case there's something that comes up that I need to put in the middle, I would then put the one in between 10 and 20 is 15 so that I have the option to keep adding things in the middle ten times before I…excuse me…9 times before I have to edit any of my existing contacts. And I can just keep adding to that list. And again, this is something we'll go over the training, but just keep in mind this is where you find the information and this is where you edit it. List of counties. List of potential education levels. The eligibility, ethnicity, which functions just like in DAD 1.0 where there's a list of ethnicity that you map back to. Again, that list is long because you do have three types for each eligibility. Facilities and facility types. Again, when creating facilities, first you would set up the types and then you would set up the facilities. The facilities are populated by types and when an individual comes in to create a service request, first they select the type of facility and then they select from that then filtered list the facility they exist. This was done in part to give the user the ability to have a much shorter list when going through the process. Genders. Before you had male and female and not selected. Now you have male, female, other, and not selected. Which you can map multiple items to that locally to find option to be transgender or whatever your local agency recognizes in addition to male, female, and not selected. Guardian types, languages, relationships. These are relationships to the client such as self, brother, mother, other family member, things like that. Service request types. In DAD 1.0 you have a service request type that there's about 15 items, four of which are non case services including INR and review and non client directed project and client grievance. Whereas the rest are all handled equally as case services. In DAD 2.0 there are the core service request types of case, non case, is an INR, non case, is not an INR, and not selected. This is the screen where you would collect…create a service request type called client grievance and you could document your grievances to that particular service request type should you chose. You also had the ability to create a service request type that maps back to the non case services of INR of quick INR so that you can create data questions locally that tie back to either quick INR or INR should you want to specify between the two.

Moving on to project options, we have dissemination of information methods, issues and barriers, and these are going to associated directly to what's found on the PPR's, for example you get to populate a list of issues and barriers that you had to interface with and you can check them off as you go through projects. There are project types. There is a minimum listing of I'd say about the first nine of these, administrative is a locally defined option, whereas the rest are put in place because they are different data elements associated with each one of these types. So when you get your DAD 2.0 environment, everything but administrative will already be set up as a default for you. Administrative, I created just as an example of a locally defined option, which would also be a great placeholder for any timekeeping projects you may have to create for just specific administrative roles or job duties. And again, during our training, we will go over and provide resources to dictate which data elements show based on which project type is selected. Target populations, when providing training and outreach, you get the opportunity to select the target populations in which this training or outreach is specified. And so you get to create target populations. I just threw some samples in there. And then we have training methods. This is just going to be further support for your narrative. You can tack down exactly which computer instruction, classroom instruction, individual instruction, anything that you feel is a method that your office utilized to provide training or outreach to a particular individual will be selected here and you can document it as you move through the project wizard….excuse me, once you've created a project you can select edit training methods from the drop down and specify that particular training method.

Moving on to local data options, in replacement of opening and closing questions in DAD 1.0, in DAD 1.0 you have a specific area of the service request creation process and project creation process called answer opening questions. In DAD 2.0 these data elements are integrated into the particular windows when you are creating these particular options. So when you are creating local data fields, you are going to first specify the question, then associate it with the funds, associate it with the service request types, or project types or problems and sub problems. Now there is a distinction between the two. You have both data fields and you have unfiltered tables. Local unfiltered tables do not filter on funding source or type or problem and sub problem area and are just a general table that you can place in either client, service request, or project. This is very similar to what existed in DAD 1.0 as the special education table that you could use as you saw fit within the client record. So you can create that unfiltered table anywhere you need within the system. With regards to local data fields, you can create one that is going to be…let me go ahead and select a new one…either a check box listing, a date drop down, a drop down list, a numeric box, a text box multiline, a text box single line, or yes/no radio buttons. For a check box list, that's multiple choice and multiple selection to those of us that are used to opening and closing questions in DAD 1.0. A date drop down is going to be literally as it sounds, the ability to select a date or to click on the down arrow and view a calendar and select a date from there with a response being stored. A drop down list is what we're used to hearing as multiple choice single selection where you have a drop down of all of the available options you specify. A numeric box is where you had the ability to provide a response that is numeric only. A text box multiline is going to be a larger box with the ability to scroll. A text box single line is going to be a text return with a single line with no scrolling options. Both text boxes have an indefinite amount of characters you can respond. It's just a formatting of the field in which you're responding with that distinguishes between the two. And then the true false are replaced with the yes and no radio buttons. Once you create your local data field, you get to specify whether or not it's something that comes up at opening or closing. And then you have the ability whether or not it's on creation or edit for the client or required or optional for service request and projects. The reason why it's not required or optional for our client, is because you never technically close a client unless you're getting rid of them. For some particular administrative or data upkeep record. So you would want to know whether or not this is something that is a component of being prompted when the new client wizard is in place, which is on creation or just an available option when they go back to edit that particular client. And then again you have your opening and closing date. Help text that's available, the label for that particular item, and its name. The label is what's going to be displayed. The name is what's going to show in the administrator module, so you can distinguish between your data elements.

Associate local data fields and local unfiltered tables with existing items is to populate old service requests, old projects, old clients with new questions. Let's say for example you have been working in an environment that has thousands of clients and thousands of service requests and you have to create a new question and you want to make sure it's associated correctly with your existing clients should you ever go back and edit them. You'll open or close or what have you. You would select associate local data fields with existing clients to push those new data elements to the old closed and put away data elements. Out of date is to pull up a listing of all particular data fields and unfiltered tables, either by project service request or client that have for one reason or another no longer connected. Let's say for example I created a local data field to ask about voter registration. That voter registration status was only to be asked between a specific fiscal year. Well let's say I either change the fiscal year on the question or I change the opening and closing date of the client in which that particular data element is associated. That responded to question will go away. So you then have the ability to use the out of date client local data field option to pull up a list of all questions that have been answered that are no longer showing because they are no longer appropriate for the date ranges in which you've selected. And then you have the ability to either delete that response or leave it alone.

Moving on to time keeping. We had the time security levels. Before in DAD 1.0 you had timekeeper administration found in timekeeper. Now it's a component of DAD and the core administrator module. I'm just going to go ahead and select timekeeping to pull up the list. The default security levels are 1, 2, 3, 4, and 5. This is just a literal hierarchy to allow you to have a distinction between levels of management. You have everyone be a 1 and your administrators be a 5 or you could have everyone be a 1. Certain managers of certain people be a 2. Managers of those people be a 3. Managers of those people be a 4 and then the highest level be a 5. You also have the ability to rename these items as you see fit. Timekeeper types. In the past, DAD 1.0 also had time keeper types, but they were not definable by the local agency. You have the ability to create timekeeper types and then you have the ability to within project types to associate which timekeeper type this particular project associates with. So within project types, you specify the timekeeper type that it's associated with and you can create more than currently exists. They're just there in place to give you a filter when making time entries with the time entry method. Leave types are put in place as a hierarchy above leave.   These aren't probably the best examples.

The best example probably would be paid leave versus unpaid leave and then under unpaid leave you would have….excuse me, under unpaid leave you would have approved unpaid leave or some other agency approved unpaid leave and then under paid leave have vacation, sick leave, and the like. Under timekeeper options, you get the ability to stipulate the increment of time units. In DAD 1.0 this was only for entering time in timekeeper. In DAD 2.0 this is across the board. So you can put it in minutes or in tenths of an hour or in quarters of an hour. You have the label for exempt and non exempt for the time sheet. You have the message that's defined at the bottom. You have the lock out period. This is stipulating how many days before an individual can no longer go back and edit time entries and this is both in DAD and in the employee time report. You have non exempt work day hours. This is going to give the individual an idea of how many hours per day is expected of an employee. The start of the week for the time sheet and the advocacy group description. In DAD 1.0 this was the big paragraph that you had to request of me to change. You now have access to it to have it say whatever you want it to say. And then holidays. Holidays are just going to be a listing of days in which no work is expected of the employee. The office is closed. To create a holiday, you would just literally put in the name of the holiday….let's go with…which one is the easiest…..and then when that calendar holiday rolls around for that particular time sheet, it will reflect if there is a holiday day there. Now it will not document leave taken for that holiday. That still needs to be recorded. But it will document that a holiday was found on that particular time sheet. Again, we click on admin. to bring us back to the home page. The whole time our control panel window has been opened and that is how to navigate and to modify settings found in the DAD 2.0 administrative module. This is going to be leaps and bounds different from what you had access to in DAD 1.0 because now you have the ability to make things funding source and funding type specific, as well as some limited service request types and project types with specific options as well. Documentation and further instruction will be covered at our full training in St. Louis and if you have any questions, feel free to e-mail me. My name is Matt Hayden and I'm at matt.hayden@NDRN.org.