NWX-OS-OGC-RKVL (US)

Moderator: Tara Rice
September 10, 2014
1:00 pm CT

Coordinator: Welcome and thank you for standing by. For the duration of today's call all participants will be on a listen-only mode. During the question and answer session if you'd like to ask a question, please press star one on your touch tone phone. Today's call is being recorded. Should you have any objections, you may disconnect at this time. I would now like to hand the call over to Ms. (Amy Farb). Mrs. (Farb) you may begin.

(Amy Farb):   Thank you. Greetings everyone. If you are an OAHTPP grantee or a FISBE - I'm going to have to ask you to hold. I'm sorry. Okay, this is (Amy Farb). I'm back. Pardon the interruption but it gave a chance actually for a few more attendees to jump on the line. As I was saying, if you are an OAHTPP grantee or a FISBE previous grantee, you're on the correct webinar - our performance measures webinar. And we do appreciate that you're joining us today and I'm just trying to get the slides to advance so if you'll bear with me. Here we go.

Today we're going to remind you of the performance measures data collection timeline and then we're going to have (Eric Peel) from RTI walk you through our newly updated reporting system. And so this slide is just a reminder to you that all but one measure is collected twice a year. Only the fidelity

process is collected once a year and that once a year is actually during the upcoming collection - the fall collection - so everything is due with your collection coming up.

For OAHTPP grantees, your reporting period ended August 3t and your reporting deadline is this September 30. For FISBE previous grantees, your reporting period will end at the end of this month - September 29 - and your reporting period collection deadline is November 30.

The performance measures system has been updated. It's been updated to make it easier and more efficient for you to use. This is part of a new contract and this is what RTI has been working so hard on since they were awarded the new contract last year. RTI is going to provide a full walkthrough of the system in just a moment but you can expect to see a more streamlined and straight forward design.

It's going to be much simpler for you to enter your program data and to upload spreadsheets. The system will also help you catch any data errors before you submit them so this is new. While you're in the system entering your data, it's going to tell you something is wrong right there and you're going to be able to fix it right there so you're going to have to spend less time going back and forth and waiting for, you know, have to go through the helpdesk or talk to your project officer. You're going to be able to do it real time.

So we'll do question and answer mostly at the end of the session. I'll take a few in just a moment if you have any questions about timelines or logistics. We'll have (Eric) walk us through the new system and take questions at the end but as always if you have any questions you should always go ahead and submit them to the helpdesk at the email address that's on your screen. So

operator if you don't mind opening up the lines for any questions regarding timelines or specifics about anything I just said.

Okay, it doesn't appear that there's any questions either in the Q&A or on the lines so we'll go ahead and we'll give it to (Eric Peel) with RTI.

(Eric Peel): Okay, thanks (Amy) and thank all of you for joining today. We're excited about the new system. I hope that as we go through it that you'll find that some of those things that we've added will make your lives a little easier.

Most of our focus has been placed on changes to the data upload section as we found that the majority of our grantees use data upload as their main tool of submitting the measures. That doesn't mean our work has stopped. We're going to continue to work on the system and actually our next project for this is to (unintelligible) our reports so we'll talk a little bit about that as we move through.

You'll notice as you come to the site right now the current site is down. We're making the migration while we're on the webinar but later this afternoon the new site will be up so you'll be able to come to this new site later this afternoon. All of your data is being transferred over to the new site so you're not losing anything. We have a little bit of a new look and feel. Some of the things we've changed are the way we navigate through the site. I'm going to go ahead and log in now and show you - show you what we've done.

I would say that, you know, on this homepage we've always kind of held out this site portion for the user guide and the Excel templates. Those are still there, okay. I would say that the user guide - you're going to find that, you know, this really is still more geared toward the old site. Now the majority of

the user guide deals with a lot of definitions and the procedures for the point and click interface.

As you go through you'll see that most of those interfaces have not changed so the majority of this is still relevant and also is still relevant for the reports. The only section of this that is now outdated is the uploading data. So we will be making some tweaks to this user guide but we will - going forward what we'd like to do is address more of the issues that come up via some tip sheets which we'll disseminate and post in the resource section and via some online help by areas kind of in context with what it is you're doing.

As you come up to the top I will say under the resource section once we complete this webinar and we get the recording and transcript we're going to update this link so that anyone who could not make it today - if there's someone else in your organization or you have someone who joins your organization new - they'll be able to come and watch this recording or read the transcript here.

We have updated these links here so that we have the latest updates to the performance measures for the appropriate grantees. Helpdesk has not changed and please feel free to come and use the helpdesk as you need to. When you're going through the system and you find that maybe there's a section you don't quite understand or even through our best intentions that this be as useable as possible, it might not be so for some of you so please let us know. Let us help you go through this.

Also while we've put a lot of effort into trying to test the system, it being a new system, it has not been vetted by you and we expect that all users are going to interact with the system just a little differently and when that happens, some new things tend to pop up. So if you run into an error with the

system or if the system's not behaving properly, let us know so that we can correct that as quickly as possible for other users as well.

I'm going through these other areas because they haven't changed the report section. Again we have not changed anything within the report section. I mentioned that we've been dealing with the data upload but now that we've done that, our attention is actually being turned to the reporting section and our plans for this are to make everything a little more interactive and include some data visualization meaning that we're going to provide some charting and graphing of your measures within the section and make it a little easier to understand because I think currently in the past the way we've displayed some of these measures has not quite been as intuitive as we would like.

So while we've dealt with the usability of some of the other areas, the reports have been a little lagging so we return our attention to that next. I imagine when we do that we'll probably have another webinar for you to go to the new report section.

So the data - as you see when you log in, you know, we're trying to structure this so that it's intuitive to how you might come in and enter data. There's some of you that enter data via data entry meaning the point and click interface. There's some of you that enter via data upload and then there's a new section we have which we say submit data.

So on the submit data I'll go ahead and just mention that. What we are asking is that once you have completed entering all the data that you need to enter for that particular reporting period that you come to this section. This is similar to the old compliance report but a little - a little different in that we scan all of your program data. We provide you feedback and I'll show you what that

looks like as we get to it and then we give you the opportunity to actually submit your data.

What that does is it allows us to know that you're finished. In the past we haven't really known when you were finished or when you were still working on your data or if there were some problems in your data that you may be trying to resolve those issues. Now we want to know that you are complete with your data. Also if there are programs that you have that you are not reporting on for a particular reporting period, this allows you to let us know that as well.

So let's jump right into the data upload. We're going to hit that first. So if you come to program upload data, you'll see that we've structured this a little differently. Our navigation is now kind of tab style navigation where we go step one, step two, step three and so forth. But when you first come to a page, we want to give you a little bit of information about what we have in the system. I'm using a demo program so I don't have anything loaded yet.

You can still view the import template and what we've done is we've taken this and we've tried giving you all the information you need here as a quick reference. Again like we've had before, you've been able to download the Excel template for this particular upload.

Now I've prepared some sheets and I think the value of what we've done here is about to be made evident. So I'm going to take this spreadsheet. I've just selected it and I'm going to click process file. Now as we've processed this file we're going to get immediate feedback on our file. This is where we feel like we're trying to address issues at the point of data upload.

You'll see that we give feedback here. It says there were 12 records in my file. 7 of the 12 were added. Five were not added for the following reasons. I had three records that had an invalid code for age, one that had an invalid code for gender, one that had an invalid code for participant type. So, you know, already I know that I have problems.

Now in the past you might know that you have problems because you didn't see all of the records that uploaded, you know, we'd give you a count and that would be about it. Now we're trying to give you a little information back. Not only that, we have a button here that says export errors, okay. So I'm going to click that button and it downloads a file - a comma delimited file. If I click it, it opens it up and it actually gives me the records back so the ones that are causing me problems and it gives me an error reason for each one.

So for this participant that I uploaded I have an invalid participant type. Okay, my participant types can really only be one or two. One is - let me think - one is a youth and two is a parent or other. So I'm just going to put two here and I'm not sure. This is just dummy data so please don't read too much into the data here. This one has an invalid code for gender. Well again I may have put six thinking oh six means unknown, right, but I think four is unknown for gender.

Now I could go back and look here and see okay, one's youth, two parent, four is unknown. Okay well let me come back here and do that - fix that. Invalid code for age - oh 19. I meant there were 19, not that the code should be 19. So that 19 should be 10 so I'm going to come back and I'm going to fix that so these should all be 10.

Okay, I'm going to save this where I can find it because this is my fixed participants. Now you'll notice this is a CSV file. That's okay. The new

system will accept CSV files - comma delimited files - as well as Excel files. Also the new system will accept Excel files in any format so the previous version of the system would only accept the Excel format - I think it was Excel format 97 to 2003. The new system will accept any version of Excel as well as comma delimited format.

So I'm going to save that - yes - and I'm going to close it. It's going to - because it's got some stuff it just wants to keep asking me for some reason so I'm just going to say no to that because I've already saved it. When I go back I want to select it - next participants. I'm going to process my file and now you see that all 12 of my participants have been imported. The five that I fixed were uploaded.

So again the point of this is we want to identify the errors as you upload them. We want to give you immediate feedback. We want to give you the template back to you so that you can correct them right there in the file and then save it and upload that file. We want to shorten the process for you so that the turnaround is so much quicker.

In the past if you had problems a lot of times what you would have to do is you would have to go to the helpdesk. You'd have to say can you help me figure out which records or which participants were causing you problems and, you know, (Matt) or (Ilene) or I would have to go and dig through your records and find that and send it to you and you'd have to fix it and you resubmit as a really long cycle to get that all complete. This hopefully will resolve some of that.

Now, you know, once I have this complete - everything's uploaded, it looks good - I'm going to go onto sections, okay. I have no sections. Again I have

some sheets already picked out. I'm going to process that file. They all uploaded. That's great. I have surprises all along the way but not here.

Now assignments - now you'll see that as we come to assignments again it's giving me some information about what we already have in the system, you know, 12 participants. We know we have 12 participants because that's what it said over here when we uploaded them and they're not assigned to a section. They shouldn't be because we haven't made the assignments yet. We just uploaded the sections and it says there's seven sections or cohorts that have no participants assigned to them so these two statements are right. They're in red to let us know that hey, there may be some data here that is not quite right.

Now you'll notice there's a little icon - little green icon - so if you're going through these tabs and you want to try to find out after the fact - now it's one thing to provide you that little export button to fix the things that you're exporting at the time but for records that have already made it into the system, how do you go about correcting those? Well this is how you do that. So 12 participants are not assigned to a section or cohort.

I'm going to click this little green icon which is going to export a file. When it exports the file, I'm going to open it up and I'm going to see the 12 participants that I uploaded and they're in the same template that's necessary to upload the assignments. So I could go through here and add the sectioning for - or our cohort name for each of the assignments for these participants. Again we're trying to provide the information back to you in the form that you need so that you can make the changes right there, save it and upload.

Okay, but because I already have this all filled out, I'm just going to go ahead and select the one that I have and process that. And you see that eleven records of my 12 - eleven records were uploaded. I didn't have 12 or else it

would have told me why one didn't work but I still have one that's not assigned and I have a section that doesn't have anyone assigned. That's on purpose. I'm leaving that there because I want to show you something later in the process, okay.

Ideally you'd want to try and resolve these issues but this is not going to prevent you from moving forward. You may not have this information right now so just because you don't have it doesn't mean that you can't move forward but again this is to provide you with the information you need to correct your errors.

For my components here I'm going to select my component sheet. I'm going to process that and here it's given me a lot of information this time. Okay, for the records that uploaded it's giving me fresh information. It's saying of the six components that were uploaded all have a date that they're being administered. That's good. I mean it's doing a check basically on the components.

But two of the components that I uploaded have zero or nothing entered for the activities planned, okay. That's information that we want you to enter so it's going to flag that as red but it's not going to prevent you from uploading it because sometimes you will upload things that you don't quite have all the information for only so that you can later fill that information and upload updated information. That's okay but it's going to keep it red and it's going to show you that there's some missing data.

Also we're going to show you the different component types that you have. We have two community service and four curriculum sessions. For the ones that we have problems with in this particular file, I had 15 records. Six were added. Three were not imported for the following reasons - invalid code for

component type, invalid date. Oh, you know what? My number's off here so let's see why.

If I look at my error file, okay so here I have an invalid date in that I have no date whatsoever. Here I double typed my three and here my component type is supposed to be two, not 22. So I'm going to save that as fixed components, yes, close it. Alright, I've saved it already. Okay so now I have - I have my nine components. Now we're going to see more of this information here when we get to the submit data page so it's okay that we're going to leave some of these errors here. Again this is updating as we go along.

I have ten - nine sessions with no attendance. Now before I upload this I want to point out something here. I have eleven participants that were assigned but here it says I have ten assigned participants that do not have attendance. You may say well that's wrong -- what's wrong with this? The reason it's ten and not eleven is because there's one participant that is assigned to a section and that section does not have any components and because it does not have components, that participant is not supposed to get attendance so therefore there are only ten of these participants who are supposed to be getting attendance so that's why there are only ten that are flagged as red.

I'm going to process this and all is well. So let me just quickly do the observation then I'm going to take you to a page. Okay now here with the observations we're checking to see that we have corresponding matches and the reason for that is you have - a lot of the times your fidelity and your quality are done at the same session so we found that there are some - there are some people who have an odd number of fidelity observations compared to their quality observations. So this is just a gut check. It's okay that they are different if they truly are supposed to be different but if you - but it allows you to see if you're missing some observations that you're supposed to have.

So now that we've done this let's go to - let's go to check data for errors. This is our submission page. Now it's going to check each section for you. Again the things that are flagged in red - we're going to have the Excel export icons here and the ability to collect those things. When I go to submit the data for this program, it's going to tell me that I can't submit it. One or more errors were detected. Please correct them.

Now I will say there are some errors that are okay. So if I switch to this other program where I've loaded some data, I have just one error here where there's one section where there's no participants assigned to it. That's okay. What we're going to do here is we're going to give you a warning saying that there are errors that have been detected in your data. Because they're not critical, you may still submit your data. You just enter your initials, click okay and you submitted your data for that program, okay.

So essentially that's the process for uploading your data. That's how we're trying to provide you feedback and give you the information that you need. The participant data works the same way, you know, you have a baseline file. You'll see the same type of feedback for all that so all of your upload is going to work the same - the same way - okay.

So now that we've kind of gone through the upload process, let's look at the point and click session. Now everybody whether you do data submission via data upload or via data entry will need to come to this section that says enter grantee data. The grantee data is where we are hosting the dissemination training partners and fidelity process pages. Again there's nothing that's changed with these pages. They're the same as they have been. It's just we've organized these tabs under this section grantee data. So you'll come enter your data here.

For fidelity process this tab will only appear on the reporting periods where you need to enter this data. For the program data again you'll see that the pages for those of you who use this section look pretty much the same. Things have not changed dramatically here. If you're going to navigate from page to page and let's say that we're going to click on sections, clicking here simply just changes the tab that I'm on.

There are some things such as attendance where you may need to go through several components and add attendance. If that's the case then we have a popup so that you can do that but as you see, all of these are still the same and then the same for participant data.

Okay, so I think that's for the most part it. As you see, the majority of the work has been changed in the navigation - how you access these things - so it's a little more logical - a little more intuitive how you will flow through entering your data and then providing a great deal of feedback.

Now one thing that came up when we were doing a little bit of pilot testing is if you are a point and click person if you enter your data this way, it may be useful for you to switch over to the upload pages. And in switching over you can simply go through these pages and see if there are gaps in your data. Now some of this information, you know, should be here on the check data for errors.

So if you - so if you want to do that, you can. If you want to go through the process of tabbing through those pages, that may be helpful. So with that I think we're ready to kind of stop and open it up for questions. And operator, if you can open up the line and if there's anybody that wants to type in their question and have it read, that would be fine too.

Woman: Okay, we have a question from (Gene) - (Gene Solis) - and she says how do we know which error messages are okay within RTI and not mandatory. So I think she's saying (Eric) which ones are, you know, deal stoppers.

(Eric Peel):   Well, you know, we aren't necessarily telling you that I guess, are we? You know, we'll put together a little tip sheet on that and post that on this page. Basically for each of these items they are flagged as either provider warning or stops mission. So we'll - I'll post something for you to have that.

Woman: Okay, thanks.

(Eric Peel):   Sure.

Woman: I don't see any other questions. Now there may be some on the line but there are none - well here comes one. I was too quick. We have one from (Sophia Nash). How do we remove participants that may have been uploaded but have no data because they didn't complete transfer or never started?

(Eric Peel):   In the past and this is still true - if you have a participant that you need to remove so for instance let's say we - well let's say we want to remove a participant. We would need to use the point and click interface. We don't have any facility for bulk deletion. Any deletion you do has to be done on a one by one basis so you would come to the program data and go to your participant's page and on your participants page you would search for your participant.

Oh but this - I'm glad you asked because that does remind me of something. So you would search for your participant and you could delete that participant. Now I will say that we have made one other change and I don't know if you noticed it - actually two other changes - so let me point out those.

One is with the participants we are no longer requiring you to enter a report period ID with those participants. So let me explain a little bit of the reasoning behind that and why we were doing it in the first place. So with participants ideally what we want to do is we want to stay up to date with the demographic information behind your participants. So as they age your program - if you have a longer program that goes, you know, say two years, three years obviously they're going to age. They're going to get older. They're going to go through grades - hopefully they're going to graduate one grade to the next.

And we want that information to be updated in our system so that when we're providing reach data we have the appropriate reach data. So the whole purpose of us in the first place providing a report period along with the participant list is in a way to kind of version the participant so that we have version one of the participant - version two of the participant in a sense. It's just it never - it was never a very straight forward or easy to understand way of doing it.

So what we're doing is we removed that requirement for you and we're just handling everything behind the scenes. So now if you update a participant, we're maintaining the history of that participant so that we see how they age through the system. So you - if, you know, the one participant - if he or she is in your program through three years, you can just continue to assign them to new sections and new cohorts all along the way and each year if you want to update their information - actually you should update their information. You'll do that and we take care of the versioning behind the scenes.

Because it affects a few programs - in the majority of the programs it was just cumbersome and unyielding and confusing so we removed that. We're taking care of that now and you don't have to worry about it. So when it comes to

deleting - let's go back to that question you just asked. When it comes to deleting a participant, you have to think about it. Do I want to delete the participant or do I want to remove them from a section?

If you're a short term program most likely if they have participated in anything before, you're going to delete them but if there's a participant who has participated in other sections previously, you're going to want to un-assign them from the participant - from that section or cohort. So if I had - if I had this participant let's say, I'm going to click okay. So this participant LM - right now he's assigned to bass. Now these are all fish obviously because I like to fish, right.

But let's say he had three different sections that he has participated in in the past but this third section he has not participated in - he never even started it. Rather than delete him because he's participating in all these other sections, I'm just going to remove him from this section so that's the difference. Now if you make a mistake, it's okay. You just need to let us know as soon as you can because we make backups of the data and we can recover that but you really don't want to delete a participant who has been in multiple sections.

Woman: Okay, thank you (Eric). We have a question from (Joy Land) where she did notice that the phone lines weren't operating so operator, maybe you can get that going but she did type her question in. She said when will the new upload spreadsheet templates be ready. Will all of them be changed or just the observation data ones?

(Eric Peel):   Very good. Thank you for, you know, again you guys are great at prompting - you guys are great at prompting questions. So when a new system comes online, it will have all of the new templates. So really the only changes to a template are the participant template which we're dropping the report period

but that's okay. If you have templates that you're using, we just ignore that column, okay. So if you've already entered data in your upload spreadsheets for participants, that's okay. You don't have to worry about moving all of that over to the new spreadsheet. We just ignore the report period column, okay.

Now for the observation, let me go over here to the upload. Now what we've done is we have - in the past you've had to upload observation - observation fidelity and observation quality separately. We have found that that leads to more errors than we would like so we have combined the observation into one spreadsheet. Essentially if you look at this, both templates have section name and component name and date and the fidelity had activity scheduled, activity completed whereas the quality had quality one through quality seven.

So what we did is we just took the observation fidelity spreadsheet and we appended the columns quality one through quality seven to that spreadsheet to make a new template which combines the observation spreadsheets, okay. So that new spreadsheet is also available once the new site comes up this afternoon.

Woman: Thank you (Eric).

Coordinator: Again if you would like to ask a question on the phone, please press star one.

Woman: Okay, we have a question typed in from (Jena Hoffer). She asks how do we note that we have no data for a particular program for the reporting period.

(Eric Peel):   If you have no data for that - for every program you have entered in the system, you just submit the data. What will happen is when you go to that program you essentially will have nothing - nothing there but it won't create errors.

So for - let me - sorry I can't talk and chew gum at the same time. So for this if I don't have anything - all of this is really driven by session date, okay or component date. So if you don't have anything where there's a component date within the reporting period, you're not going to generate any red errors. You're not going to generate any red errors and anything that will cause you to prevent - sorry - that will prevent you from being able to submit your data.

So for any program you have, you need to submit your data even if you didn't collect data for that reporting period so that we know, you know, what your intentions were, okay.

Woman: Okay.

Coordinator: I show no questions in the queue at this time.

Woman: Okay. I have another question here from (Erika). She - (Erika Driver) asks will the data entered for each reporting period regarding dissemination training and those grantee level measures stay or will it delete itself after being entered.

(Eric Peel): It will stay. Now there was an issue that we had with some of those forms where we had some problems saving data with those. Now we've corrected those forms so you should be able to go to those forms and pull up data from prior periods as you toggle between the reporting periods. But you should - all your data should stay there.

Woman: Thank you. I don't see any more questions that have been typed in. Operator, are there anymore in the queue?

Coordinator: There are no questions in the queue at this time.

Woman: Okay. That's all we have (Eric). I think everything else has been, you know, explained pretty well and there may be questions we know once you all get started. You know how to find us.

(Eric Peel): It looks like there's another question popping up.

Woman: Oh, here it is. Here we go. (Jackie Plaid) asked if we need to upload data for one reporting period a little at a time, do we submit data as we go or will data be saved and we submit when finished? That's a good question.

(Eric Peel): So you can do it a little at a time if you'd like. So for instance if I go back to the participant upload, I can just select my participants file again. I've already uploaded it but you're going to see that when it uploads. Oh sorry, I need to upload the good one. Fix participants - I see that one. Okay so I uploaded it.

Now five records were found in the file. No participants were added. Five participants were updated. So if you update - if you upload your spreadsheet and you have some of your information on all of it, it's just going to update any information that you already have in the system. So anything that you previously had if you make a change to it also you can update it that way but you can - it adds to and updates but it does not duplicate, okay.

Woman: Okay, thank you. Let me see. I don't see any more questions here. Nope, no more questions.

(Eric Peel): Okay so, you know, as I said, you know, we've tried to go through and test this. We feel like it's going to be helpful. We hope it's going to be helpful. We'd like to hear what your feedback is. If you run into problems if there are

errors if there are things that are quirky, please let us know. We want to resolve those as quickly as possible because the one thing we cannot do is we cannot anticipate all of the variations of information that are going to come into this system. So I fully expect that it's not going to be perfect out of the gate and I apologize for that upfront but we will - we will certainly get it there in very short order with your help.

So that and just thank you - thank you for all your hard work, you know, all of your feedback has made a lot of this possible. A lot of your suggestions have been put into this system and, you know, over the past several years I've gotten to know several of you and I think that you've actually been a part of this development process and really informed the decisions that have been made to try and make the system better. So we really appreciate your input and your involvement in this process. Thank you.

(Amy) do you have any important comments?

(Amy Farb):   Sure. Can you guys hear me?

(Eric Peel):   Yes.

(Amy Farb):   Oh, great. Okay yes, I just want to say thank you to everybody. We understand that you're just seeing this for the first time and those of us leading this have seen it a lot so please do ask your questions. Please do send us your questions through the helpdesk, you know, get on the phone with your PO and, you know, I'm happy to help as well.

So for OAHTPP grantees, only a couple of more weeks until your date is due so don't hesitate. Thanks everybody. Have a good day.

Woman: Okay, thank you.

(Eric Peel):   Thank you.

Coordinator: This does conclude today's conference. All participants may disconnect at this time.

END