

GEMS Trainings



2011

September-October



Our Company is.....



Our System is.....



Initiatives



Strengthening Families
Making Connections
First 5 CA
Smart Start
Community Action Programs

Domains



Mental Health
Education
Family Support
Employment/Workforce
Housing/Homeless
Community Development
Foundations/NPOs

Lifespan



Newborn
Preschool
School-Aged
Teens
Youth Transition
Adults
Seniors

We customize GEMS to meet
the needs of each of our clients



**TODAY WE WILL BE LOOKING AT THE
GEMS SYSTEM WE HAVE
CUSTOMIZED FOR**

YOU!

Agenda



System Overview

Explanation of Demonstration Script

Demonstration

Break

Revisiting the Demo Script

Lab Time and Q & A

Wrap-up and Upcoming Technical Assistance


Activities September-October



Week 1: Sept. 26-30:
- Training Workshops



Week 2: Oct. 3-7:
- Training Workshops



Week 3: Oct. 10-14:
- User Accounts Released



Week 4: Oct. 10-21:
- Data Import Review



Introduction to GEMS

GEMS Data Organization & Logic



GEMS Funder View (Contractual & Admin)

- Shows who they are funding and for what (example: funded programs, contract details, SOW info, etc.)

GEMS Funder View (Evaluation)

- Provides a County wide view of what is going on in the community (use data to monitor outcomes and complete evaluation activities)

GEMS Tracker View (Funded Programs) Program-wide view of clients, services, outcomes and reports

- User is able to:
- Enter data into GEMS
 - Run detailed reports
 - Use GEMS for self-evaluation activities



Module Overview



GEMS Landing Page

- ✓ Save this page
- ✓ Username and Password access

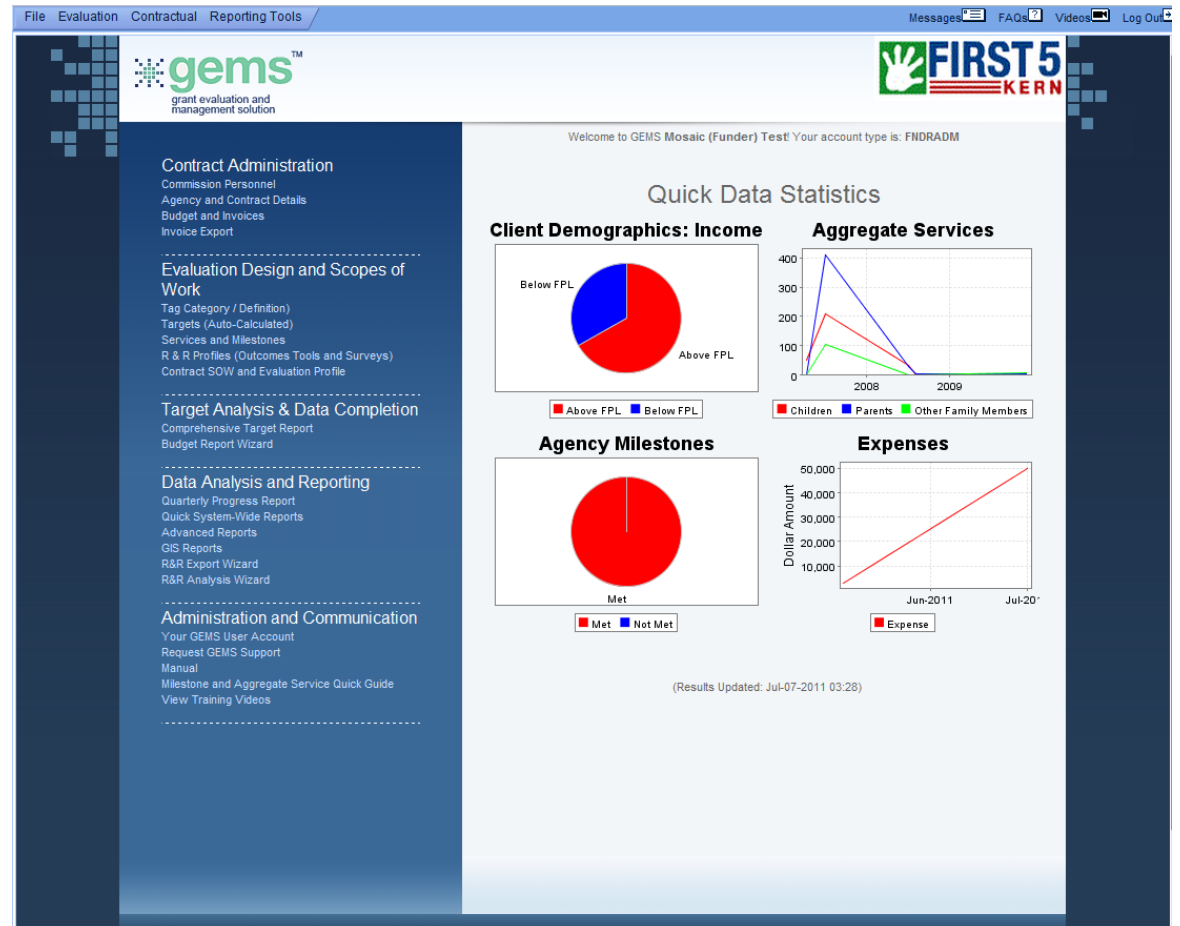
Accessing GEMS



When you log in:

- ✓ GEMS Portal
- ✓ Quick Data Statistics
- ✓ Module Menu Bar

GEMS Portal



Data Entry Screens

- ✓ Header and Details Panes
- ✓ Basic Navigation
- ✓ Tabs, Pop-ups and Buttons
- ✓ Adding, Editing and Saving
- ✓ Accessing Detailed Data

GEMS Data Screens

Children 0-5

Record 1 of 77

First Back Next Last Add Edit Delete Copy Grid Form Print Find Sort Export

Levya, Pauly .

Member Name: Pauly Levya
GEMS MEM ID: MEM4709
Family: [Levya \(FAM1962 \) \[Levya \]](#)
Alt Member ID: ID# 123CFCOC I
Date of Birth: 01/16/2005
Program Entry Date: 01/02/2007
Gender: Female
Address: CALENTE, 93518, ,
12354 Main Street
Address since: 04/27/2011

Demographics | Entry/Exit & Consent | Child Fields

Ethnicity: Black/African-American

Birth Intake Survey | Core Data Elements

Surveys

ASQ-SE Summary Scores (2) | DRDP-IT (1) | Family Support Survey (0)

ASQ-SE Summary Scores						
Chronology	Date	Version	Total Score	Cutoff Score	Category	
	05/06/2011	6 Month	3	3	Typical Development	
	05/06/2011	12 Month	3	3	Typical Development	

[Add](#)

Services (1) | Milestones (2) | Case Notes (1)

Service ID & Title	Begin Date	End Date	No. Units	Unit of Measure
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Managing Data

- ✓ Required Fields
- ✓ Drop-downs
- ✓ Error Messages
- ✓ Editing, Saving and Canceling
- ✓ Find and Filter
- ✓ GEMS Wizards

Common Data Operations

Children 0-5

First Back Next Last Save Cancel Grid Form Print Find Sort Export Text? Find

Child 0-5 Information

Child Id (*auto generated) MEM4709 Program Defined (Alternate) Id ID# 123CF00 I

Family Id **Leyva (FAM1962) [Leyva]**

First Name **Pauly**

Middle Name Initial Name Suffix

Last Name **Leyva**

Gender **Female**

Date of Birth **01/16/2005**

Mother's First Name **Mireya**

Click here to edit information & check if client already exists

Mother's Maiden Name

Child's Nicknames

Father's First Name

Father's Last Name

Consent form signed? **Yes**

Date consent form signed **01/10/2007**

Date consent form expires **01/10/2017**

Program Entry Date **01/02/2007**

Program Exit Date

Current Classroom Enrollment Date

Current Classroom Enrollment Type

2007-07-31 18:56:00 : Record Created

Data Entry Screens

- ✓ Header and Details Panes
- ✓ Basic Navigation
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- ✓ Accessing Detailed Data

GEMS Data Screens

Children 0-5

Record 1 of 77

First Back Next Last Add Edit Delete Copy Grid Form Print Find Sort Export

Levya, Pauly .

Member Name: Pauly Levya

GEMS MEM ID: MEM4709

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Birth Intake Survey Core Data Elements

Surveys

ASQ-SE Summary Scores (2) DRDP-IT (1) Family Support Survey (0)

ASQ-SE Summary Scores

Chronology	Date	Version	Total Score	Cutoff Score	Category
	05/06/2011	6 Month	3	3	Typical Development
	05/06/2011	12 Month	3	3	Typical Development

Add

Services (1) Milestones (2) Case Notes (1)

Service ID & Title	Begin Date	End Date	No. Units	Unit of Measure
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Data Tracking

Setting up a new budget in GEMS

- ✓ Main Budget Information
- ✓ Click Add
- ✓ Select FY and Contract from dropdown
- ✓ Enter Initial Payment Amount and percentages withheld
- ✓ Save to proceed

Creating a Budget

The screenshot shows the 'Budgets Module' window. The 'Add' button in the toolbar is circled in red. The main content area displays budget details for 'Budget ID: BUD997' and 'Profile Id: Early Intervention Program [Early Intervention Program (Henrietta Weill Child Guidance Clinic)] (CONTR69)'. The 'Lead Budget' section shows a table with columns for 'Requested Amount', 'Other Funds', and 'Total'. The 'Invoices (0)', 'Amendments (0)', and 'Revisions (0)' sections are also visible.

	Requested Amount: 0.00	Other Funds: 0.00	Total: 0.00
Total Requested	0.00	0.00	0.00
Total Other Funds	0.00	0.00	0.00

	Total Requested	Total Other Funds	Total
Personnel	0.00	0.00	0.00
Benefits	0.00	0.00	0.00
Services and Supplies	0.00	0.00	0.00
Indirect Cost	0.00	0.00	0.00
Sub Contractors	0.00	0.00	0.00
Total Expenses	0.00	0.00	0.00

Invoice	Period	FY	Submission Date	Status	Amount	Quick Report	Printable Invoice
Add							

Amendment	Period	FY	Submission Date	Status	Amount	Quick Report
Add						

Revision	Period	FY	Submission Date	Status	Amount	Quick Report
Add						

The Process of Adding Line Items

- ✓ Click "Edit" in header panel
- ✓ Enter total budget dollars
- ✓ Add line items
- ✓ Save

Budgets Module

Record 15 of 15

First Back Next Last Add Edit Delete Grid Form Print Find Sort Export

Budget ID: BUD1000
 Profile Id: Lyanna's Test program profile [] (CONTR1484)
 Fiscal Year: Fiscal Year 2011-2012

Budget Title:
 Assigned Staff:

One Click
 Allocation
 Claims Analysis

Lead Budget

Budgets Module

Editing row

First Back Next Last Save Cancel Grid Form Print Find Sort Export

Budget Id: BUD1000 Fiscal Year: Fiscal Year 2011-2012 Review Allocations

Contract Id: Lyanna's Test program profile [] (CONTR1484)

Initial Payment Amount: 1,000.00
 Percent Initial Payment Withheld (%): 10.00
 Quarter 4 Withheld (%): 10.00

Lead Agency Expense

	Prop-10 Program Budget	Organizational Support	Total	
Total Funds	.00	.00	.00	Income Source (0)

Lead Agency Expense Details

Item	Prop-10 Program Budget	Organizational Support	Total	
Personnel	.00	.00	.00	Personnel (0)
Benefits	.00	.00	.00	Benefits
Services and Supplies	.00	.00	.00	S
Sub Contractors	.00	.00	.00	
Indirect Costs	.00	.00	.00	Indirect Cost (0)
Total Project Expenses	.00	.00	.00	

Notes

Line Item Fields

- ✓ Yellow fields are mandatory
- ✓ Complete all fields, then click “Save”
- ✓ Use the “Save & Add New” button to enter additional line items in this category

Adding Line Item Details

The screenshot shows a software window titled "Personnel" with a "Personnel Expense" form. The form includes the following fields:

- Position (Yellow field)
- Sort Order (Text field)
- Salary (Requested) (Yellow field)
- Total (Text field)
- Name (Text field)
- Prop 10 hours (Text field)
- FTE (Dropdown menu)
- Salary (Other Funds) (Yellow field)
- Benefits (Other Funds) (Yellow field, value: .00)
- Grand Total (Summary box containing Requested Salary: .00 and Requested Benefits: .00)

The top toolbar contains buttons: First, Back, Next, Last, Save (circled in red), Cancel, Grid, Form, Print, Find, Sort, Export, and a search box with "Text?" and "Find". At the bottom, there are two buttons: "< Save This & Edit Previous" and "Save & Add New" (circled in red).

Saving a Budget

- ✓ After you have entered all dollar amounts and your budget balances, make sure to click “Save” at the top of the screen
- ✓ If you do not click “Save,” your work will be lost

The screenshot shows the 'Budgets Module' software interface. At the top, there is a menu bar with various icons, including a 'Save' icon (a floppy disk) which is circled in red. Below the menu bar, the form displays the following information:

- Budget Id: BUD1000
- Fiscal Year: Fiscal Year 2011-2012
- Contract Id: Lyanna's Test program profile [1] (CONTR1484)
- Initial Payment Amount: 1,000.00
- Percent Initial Payment Withheld (%): 10.00
- Quarter 4 Withheld (%): 10.00

Below this, there are two summary tables:

Lead Agency Income Source

	Prop-10 Program Budget	Organizational Support	Total	
Total Funds	1,000.00	.00	1,000.00	Income Source (0)

Lead Agency Expense Details

Item	Prop-10 Program Budget	Organizational Support	Total	
Personnel	.00	.00	.00	Personnel (0)
Benefits	.00	.00	.00	Benefits
Services and Supplies	500.00	.00	500.00	Services&Supplies (1)
Sub Contractors	500.00	.00	500.00	Subcontractor (1)
Indirect Costs	.00	.00	.00	Indirect Cost (0)
Total Project Expenses	1,000.00	.00	1,000.00	

At the bottom of the form, there is a 'Notes' section with a text area.

Invoices, Amendments, Revisions

- ✓ Scroll down the page to the Invoice, Amendment, or Revision tab
- ✓ Click Add
- ✓ Submitted Invoices and Revisions will appear beneath the tab
- ✓ Click on an invoice to access details

The screenshot displays a software interface with several sections:

- Lead Budget**: A summary table showing budget details.
- Invoices (0)**: A table with columns for Invoice, Period, FY, Submission Date, Status, Amount, Quick Report, and Printable Invoice. An [Add](#) button is circled in red.
- Amendments (0)**: A table with columns for Amendment, Period, FY, Submission Date, Status, Amount, and Quick Report. An [Add](#) button is circled in red.
- Revisions (0)**: A table with columns for Revision, Period, FY, Submission Date, Status, Amount, and Quick Report. An [Add](#) button is circled in red.
- Allocation Categories**: A table with columns for Result and Service. An [Add](#) button is circled in red.

	Total Requested	Total Other Funds	Total
Personnel	0.00	0.00	0.00
Benefits	0.00	0.00	0.00
Services and Supplies	500.00	0.00	500.00
Indirect Cost	0.00	0.00	0.00
Sub Contractors	500.00	0.00	500.00
Total Expenses	1000.00	0.00	500.00

Creating an Invoice, Revision, or Amendment

- ✓ Enter general information in header panel
- ✓ Yellow fields are mandatory
- ✓ Make sure to click "Save"
- ✓ After saving the general information, click "Edit" to add line item details

The screenshot displays the 'Invoices' application window. The 'Expense Information' section is highlighted with a red border and contains the following fields:

- Expense Number: [Text Input]
- Payment Period (Quarter): [Dropdown Menu]
- Payment Period (FY): [Text Input]
- Date Submitted: [Text Input]
- Expense Date: [Calendar Picker]
- Status: [Dropdown Menu]

The 'Expense Details' section is a table with columns for 'Item', 'Prop-10 Program Budget', and 'Total'. The items listed are Personnel, Benefits, Services and Supplies, Indirect Cost, and Subcontractor. Each item has a corresponding 'Total' value and a button to the right (e.g., 'Personnel (0)'). Below the table, there are fields for 'Percentage Withheld (%)', 'Amount Withheld', and a 'Total' field.

Entering Sustainability Records

- ✓ General information in header panel
- ✓ Yellow fields are mandatory
- ✓ Make sure to click "Save"

Sustainability

Record 1 of 2

First Back Next Last Add Edit Delete Copy Grid Form Print Find Sort Export

Text? Filter

Sustainability ID SUST3
Funding Type Foundation
Funder State Farm
Quarter Quarter 1 (July 1 – September 30)
Status New

If other, please specify
Dollar Amount 345345.00
Notes

Sustainability Comments

- Our sustainability plans are developing.
- We have made a lot of progress. We have done:
 1. this
 2. that
 3. this
 4. that
- This is a test comment.
- Comments, will they remain?
- Sustain comments

Add

euphrates.mosaic-network.com/ajaxswing/apps/KERN#



Lab Time



Step 1: Create a Budget



Step 2: Add line items to your budget



Step 3: Create an Invoice



Step 4: Create a budget revision



Step 5: Create a budget amendment