

# 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**

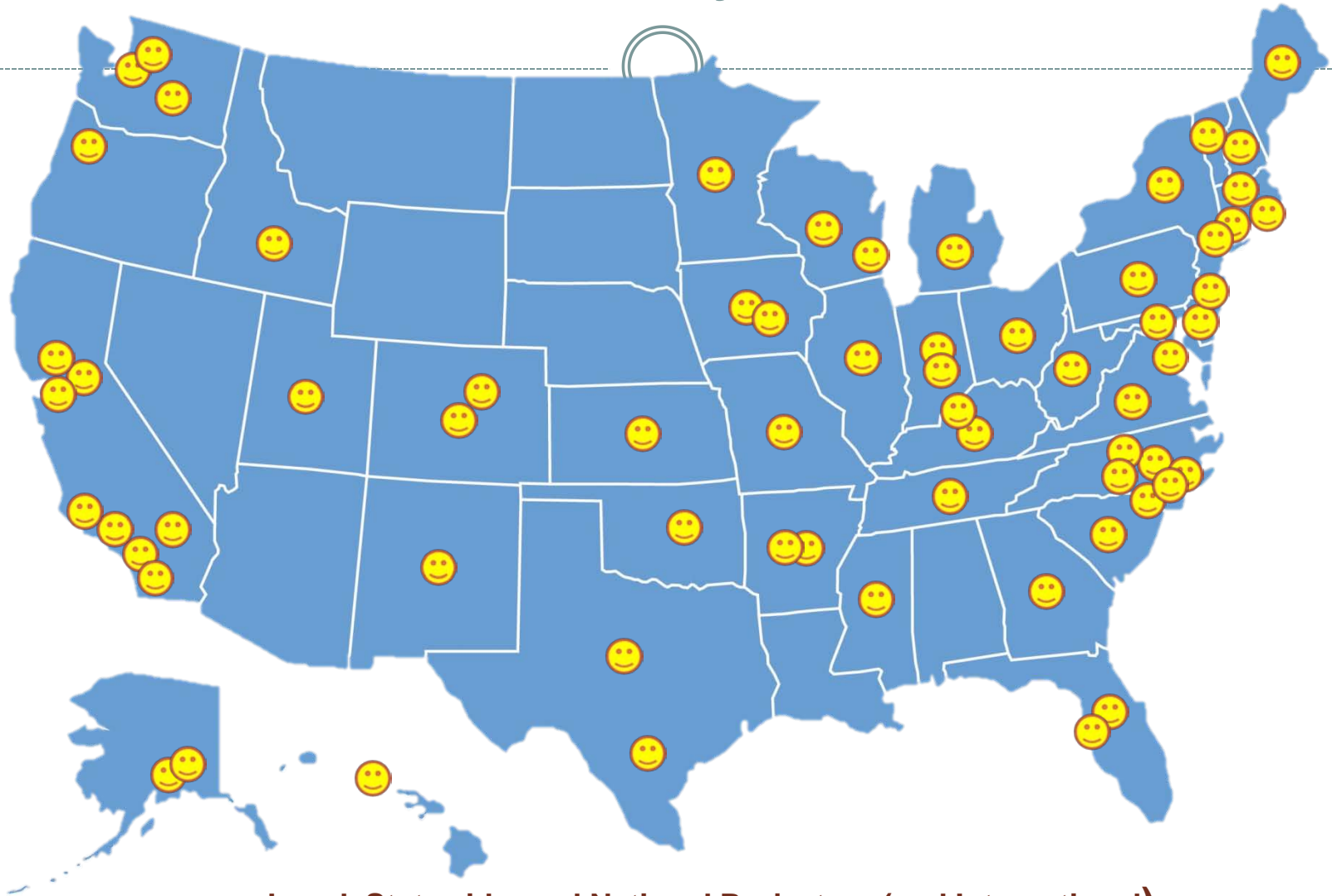
**Teens**

**Youth Transition**

**Adults**

**Seniors**

# Our Projects



**Local, Statewide, and National Projects... (and International)**

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

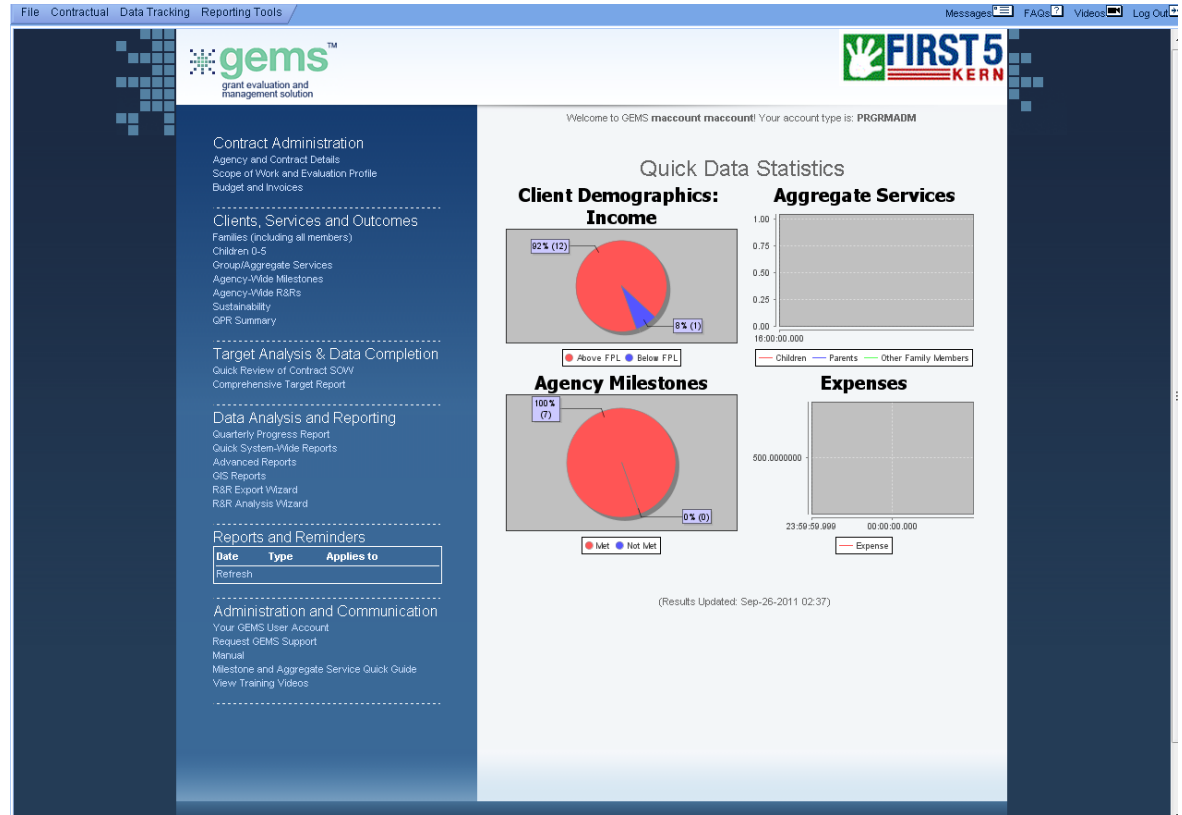
# Accessing GEMS



# 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

The screenshot shows the GEMS Data Entry interface for a child named Alex Applewood. The interface includes a menu bar with options like File, Contractual, Data Tracking, and Reporting Tools. Below the menu bar is a toolbar with various icons for navigation and data management. The main content area is divided into several sections:

- Member Information:** Member Name: Alex Applewood, GEMS MEM ID: MEM123037, Family: Applewood (FAM65894), Alt Member ID, Date of Birth: 02/14/2007, Program Entry Date: 06/29/2011, Gender: Male, Address: Declined to share address information.
- Demographics, Entry/Exit & Consent, and Child Fields:** These are tabs for different data entry sections. The Child Fields tab is currently active, showing fields for Current Classroom Enrollment Date (08/29/2011), Birth at hospital, and Nicknames.
- Birth Intake Survey (0) and Core Data Elements (0):** These are buttons for accessing specific data entry screens.
- Surveys:** A section with tabs for Services (1), Milestones (4), and Case Notes (0). Below this is a table with the following data:

Service ID & Title	Begin Date	End Date	No. Units	Unit of Measure
STXN362223; Children attend preschool class (SRV3039)	09/01/2011	09/01/2011	1.0	Other

The interface also includes a search bar and a filter button at the top right.

# Managing Data

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

# Common Data Operations

Children 0-5

Child 0-5 Information

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

Family Id Leyva (FAM1962) [Leyva]

First Name Pauly

Middle Name Initial Name Suffix

Last Name Levyva

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



# Entering a client into GEMS

- ✓ All clients connected by family
- ✓ First step is to add family
- ✓ Child is then added in Children 0-5 tab

# Adding a Client

Families (including all members)

Record 13 of 13

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

**adams**

**Family Name:** adams **Income Level:** \$10,000 – less than \$20,000  
**GEMS Family ID:** FAM65915 **Expectant mom in the family?:** Yes  
**Alt Family ID:** **Total # of children in house between 0-5:** 2  
**Intake Date:** 07/15/2011 **Total # of family members in house:** 4  
**Exit Date:** 09/20/2011 **Person assigned:**  
**Address:** 1111111111 adams  
LAMONT, 93241  
**Primary Phone Number:** 6612223333 [Cell]

**Children 0-5 (0)** Case Notes (2)

GEMS ID	Full Name	Alt Member ID	Date of Birth	Intake Date	Gender
<a href="#">Add</a>					

**Surveys**

**Child Services (0)** Child Surveys (0) Child Milestones (0) Child Case Notes (0)

Service ID & Title	Full Name	Begin Date	End Date	No. Units	Unit of Measure
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# Creating a Child Record

- ✓ Click "Add" in Child 0-5 tab
- ✓ Enter First Name, Last Name, Gender, Date of Birth and Mother's First Name
- ✓ GEMS will search the system for duplicates
- ✓ If no duplicates exist, you will see a message that says you can proceed with your work

## Adding a Child to a Family

The screenshot shows the 'Members' window in the GEMS software. The 'Child 0-5 Information' tab is selected. The 'Child Id (\*auto generated)' field contains 'MEM123063'. The 'Program Defined (Alternate) Id' field is empty. The 'First Name' field is highlighted in yellow. The 'Middle Name Initial' and 'Name Suffix' fields are empty. The 'Last Name' field is highlighted in yellow. The 'Gender' field is a dropdown menu with a yellow highlight. The 'Date of Birth' field is empty. The 'Mother's First Name' field is highlighted in yellow. A red box highlights a button that says 'Click here to edit information & check if client already exists'. Below this button are fields for 'Mother's Maiden Name', 'Child's Nicknames', 'Father's First Name', and 'Father's Last Name'. At the bottom, there are fields for 'Consent form signed?', 'Date consent form signed', 'Date consent form expires', 'Program Entry Date', 'Program Exit Date', 'Current Classroom Enrollment Date', and 'Current Classroom Enrollment Type'. On the right side, there are buttons for 'Services (0)', 'R&R (Surveys) (0)', 'Target Questions (0)', and 'Case Notes (0)'.

# Core Client Services

# Service and Milestone Transactions

- ✓ Child 0-5 Module
- ✓ Service or Milestone tab
- ✓ Click "Add"

The screenshot shows a software window titled "Children 0-5" with a toolbar containing icons for First, Back, Next, Last, Add, Edit, Delete, Copy, Grid, Form, Print, Find, Sort, and Export. The main content area displays member information for "Anderson, Allison A." with fields for Member Name, GEMS MEM ID, Family, Alt Member ID, Date of Birth, Program Entry Date, Gender, Address, and Address since. There are tabs for Demographics, Entry/Exit & Consent, and Child Fields. On the right, there are buttons for "Birth Intake Survey (1)" and "Core Data Elements (1)". Below the member information is a "Surveys" section with tabs for "Services (1)", "Milestones (2)", and "Case Notes (0)". A table lists a service with the following data:

Service ID & Title	Begin Date	End Date	No. Units	Unit of Measure
STXM362221: Children attend preschool class (SRV3039)	09/01/2011	09/01/2011	1.0	Other

An "Add" button is located below the table, and the "Services (1)" tab is highlighted with a red box.

# Updating Service and Milestone Forms

- ✓ Select service from dropdown menu
- ✓ Complete all yellow fields
- ✓ Add any applicable notes
- ✓ Click "Save" to save your record

## Service and Milestone Transactions

The screenshot displays the 'Services' application window. The title bar reads 'Services'. The menu bar includes 'Next', 'Last', 'Add', 'Edit', 'Delete', 'Copy', 'Grid', 'Form', 'Print', 'Find', 'Sort', and 'Export'. The toolbar contains icons for 'First', 'Back', 'Next', 'Last', 'Save' (highlighted with a red box), 'Cancel', 'Grid', 'Form', 'Print', 'Find', 'Sort', 'Export', and a 'Text?' dropdown. The main form area is titled 'Individual Service (Transaction) Delivery information'. It contains the following fields: 'Service Transaction Id' (text box with value 'STXN362241'), 'Client Id' (text box with value 'MEM123036'), 'Service ID & Name' (dropdown menu), 'Begin Date' (calendar icon), 'End Date' (calendar icon), 'Total # of Services' (text box), 'Number of Occurrences' (text box), 'County' (dropdown menu with value 'Kem County'), 'City' (dropdown menu), and 'Zip Code' (dropdown menu). Below the form is a 'Comments' section with a 'Provided By' text box and a large 'Comments' text area.

# Aggregate Services

## Adding a group service record

- ✓ Select the appropriate tab on the top of the screen
- ✓ Click “Add” to enter a new record
- ✓ Previously updated records can be viewed below

Group/Aggregate Services

Parent/Guardian Services (23) Child Services (4) Provider Services (4) Program Services (1)

Record 1 of 4

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

Child Service (SRV3044)  
[Minutes; Child]

Service Instance:	Begin Date:	End Date:	Total # of Units:	Total # of New Clients:	Total # of Repeat Clients:	Total # of Clients:	County:	City:	Zip:	Provided By:	Number of Occurrences:	Comments:	Tags Attached to the Record:
<a href="#">STXN362187</a>	09/05/2011	09/07/2011	3.0	10	2	12	Kern County	ARVIN	93203	Lyanna	1	The children that attended this three day camp really benefited. We can see that they have displayed advanced social skills as a result.	
<a href="#">STXN362213</a>	09/12/2011	09/14/2011	3.0	4	10	14	Kern County	CALIENTE	93518	Lyanna	1	The children that attended this three day camp really benefited. We can see that they have displayed advanced social skills as a result.	
<a href="#">STXN362214</a>	09/19/2011	09/21/2011	3.0	7	8	15	Kern County	GLENNVILLE	93226	Lyanna	1	The children that attended this three day camp really benefited. We can see that they have displayed advanced social skills as a result.	

# Aggregate Services

## Completing a group service record

- ✓ Select a service from the dropdown menu
- ✓ All yellow fields must be completed
- ✓ Enter the total number of repeat clients and the total number of new clients
- ✓ GEMS will total the number of clients for you
- ✓ This gives you a unique count of clients served

The screenshot shows a software interface for entering service records. The title bar reads "Group/Aggregate Services". Below the title bar are tabs for "Parent/Guardian Services (23)", "Child Services (5)", "Provider Services (4)", and "Program Services (1)". The "Child Services (5)" tab is active. A toolbar contains buttons for "First", "Back", "Next", "Last", "Save" (highlighted with a red box), "Cancel", "Grid", "Form", "Print", "Find", "Sort", "Export", and a "Text?" checkbox. The main form area is titled "Group/Aggregate Service (Transaction) Delivery Information". It contains several input fields: "Service Transaction Id" (STXN362242), "Client Id" (GROUP), "Service ID & Name" (a dropdown menu), "Begin Date" and "End Date" (calendar pickers), "County" (Kem County), "City" (a text field), "Total # of Services" (a text field), and "Zip Code" (a dropdown menu). Below these are three summary fields: "Total # of Repeat Clients", "Total # of New Clients", and "Total # of Clients" (0). A "Comments" section follows, with a "Provided By" field and a large text area for "Comments".

# Updating a Milestone

- ✓ Click "Add" beneath the milestone you would like to update
- ✓ Enter your information in the pop-up box
- ✓ Milestones are updated with either a met/not met response or a numeric response
- ✓ Make sure to click "Save" to save your work

# Agency Wide Milestones

The screenshot shows the 'Agency-Wide Milestones' application interface. At the top, there is a navigation bar with buttons for 'First', 'Back', 'Record 1 of 19', 'Next', 'Last', 'Edit', 'Delete', 'Grid', 'Form', 'Print', 'Find', 'Sort', 'Export', 'Text?', and a 'Filter' input field. Below the navigation bar, there are two sections of milestones, each with a table of data and an 'Add' button.

**Milestone 1:** Number of parents who are engaged in parent education, that demonstrate an increase in knowledge. (Number of parents who are engaged in parent education programs, that demonstrate an increase in knowledge) Numeric, MDEF397

Instance Id:	Update Date:	Response:	Comments:
<a href="#">Add</a>			
<a href="#">MTXN28488</a>	09/06/2011	9.0	Parent education classes included a pre and post test component, which measured the increase in knowledge that participants demonstrated after completing the session.
<a href="#">MTXN28482</a>	09/01/2011	125.0	We showed excellent results in this area
<a href="#">MTXN28487</a>	08/30/2011	16.0	Parent education classes included a pre and post test component, which measured the increase in knowledge that participants demonstrated after completing the session.
<a href="#">MTXN28486</a>	08/16/2011	9.0	Parent education classes included a pre and post test component, which measured the increase in knowledge that participants demonstrated after completing the session.
<a href="#">MTXN28485</a>	07/28/2011	8.0	Parent education classes included a pre and post test component, which measured the increase in knowledge that participants demonstrated after completing the session.
<a href="#">MTXN28483</a>	07/05/2011	10.0	Parent education classes included a pre and post test component, which measured the increase in knowledge that participants demonstrated after completing the session.

**Milestone 2:** Number of women who did not drink alcohol during pregnancy. (Number of women who did not drink alcohol during pregnancy) Numeric, MDEF423

Instance Id:	Update Date:	Response:	Comments:
<a href="#">Add</a>			
<a href="#">MTXN28500</a>	09/06/2011	12.0	This workshop for at-risk pregnant women measures the number of women who did not drink during their pregnancies.
<a href="#">MTXN28499</a>	08/30/2011	9.0	This workshop for at-risk pregnant women measures the number of women who did not drink during their pregnancies.
<a href="#">MTXN28498</a>	08/11/2011	13.0	This workshop for at-risk pregnant women measures the number of women who did not drink during their pregnancies.
<a href="#">MTXN28496</a>	07/19/2011	6.0	This workshop for at-risk pregnant women measures the number of women who did not drink during their pregnancies.
<a href="#">MTXN28497</a>	07/19/2011	10.0	This workshop for at-risk pregnant women measures the number of women who did not drink during their pregnancies.
<a href="#">MTXN28495</a>	07/05/2011	10.0	This workshop for at-risk pregnant women measures the number of women who did not drink during their pregnancies.

**Milestone 3:** Child entering kindergarten is ready for school. (Child entering kindergarten is ready for school) Met/Not-Met, MDEF427

Instance Id:	Update Date:	Response:	Comments:
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# Completing Surveys

- ✓ Click "Add" to create a survey
- ✓ Respond to all questions, then click "Save"

# Agency Wide R&Rs

Agency-Wide R&Rs

Record 1 of 5

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

**Agency-Wide Test (: Validated)**

Assigned to: GROUP  
Number of questions completed: 1/1  
Administered: 09/11/2011.

Test

Survey ID: PDEF535 (Agency-Wide Test)  
Transaction ID: PTXN85408  
This... created on: 09/11/2011, last edited on: 09/11/2011 and... account.

# Sustainability Records

## Creating a Sustainability Record

- ✓ Click “Add” to create a new sustainability record
- ✓ Complete all fields, then click “Save”
- ✓ Commission Personnel and Program Users can exchange comments on sustainability records

The screenshot displays the 'Sustainability' application window. The title bar reads 'Sustainability'. The menu bar includes 'First', 'Back', 'Record 1 of 2', 'Next', 'Last', 'Add', 'Edit', 'Delete', 'Copy', 'Grid', 'Form', 'Print', 'Find', 'Sort', and 'Export'. The 'Add' button is highlighted with a red box. The main content area shows the following details:

- 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**

At the bottom of the form, there is a blue 'Add' button.

# Reporting

- ✓ Report Wizards will walk you through the steps needed to access your report
- ✓ Advanced vs. Quick System Wide Reports
- ✓ Viewing Reports
- ✓ Saving/Exporting Data

The screenshot shows a software window titled "Advanced Reports" with a close button in the top right corner. The window is divided into a left sidebar and a main content area. The sidebar contains a list of steps: "Choose Category", "Choose Report", "Select Parameters", "Add Graphs", "Customize Graphs", "Add Comments", and "Report Location". The main content area is titled "Step 1: Choose a report category" and features a yellow background with four radio button options: "Demographics Reports" (selected), "Outcomes/Targets", "Raw GIS Tables", and "Special Purpose Reports". At the bottom of the window, there are four buttons: "< Prev", "Next >", "Finish", and "Cancel".

# Quarterly Progress Reporting

- ✓ You can create a new report, or access a saved report
- ✓ Select report name, fiscal year, and reporting period
- ✓ All data is automatically compiled
- ✓ Enter narrative portion of your report
- ✓ You can save, print, refresh, or submit your report using the buttons at the bottom of the screen

The screenshot shows a web application window titled "Program Progress Report". The main content area is titled "Quarterly Progress Report (PPR)". Below the title, there is a "Date Administered" field with a date picker set to "09/14/2011".

The "Cover Page" section includes a "Status of the Report (automatically-filled)" dropdown menu set to "New". Below this is a text input field for a short title, followed by a "Choose Fiscal Year for the report." dropdown menu set to "Fiscal Year 2007-2008".

The "Choose reporting period for the report." section has four radio button options: "Quarter #1", "Quarter #2", "Quarter #3", and "Quarter #4".

At the bottom of the form, there are several fields: "Date Report was Created" (09/14/2011), "Date reports was last submitted." (empty), "Contract Number: 123456789", "Program Name: Early Intervention Program", and "Report Prepared By (Name):" (empty).

At the bottom of the window, there are four buttons: "Preview/Print", "Save for Editing Later", "Refresh reports", and "Submit".



**Lab Time!**



# Step 1: Add a Family



# Step 2: Add a Child to a Family



# Step 3: Add a Service



# Step 4:

# Add a Milestone



# Step 5: Add a Group/Aggregate Service



# Step 6: Add an Agency- Wide Milestone



# Step 7: Add an Agency- Wide R&R



# Step 8:

# Add a Sustainability Record



# Step 9: Run a Report