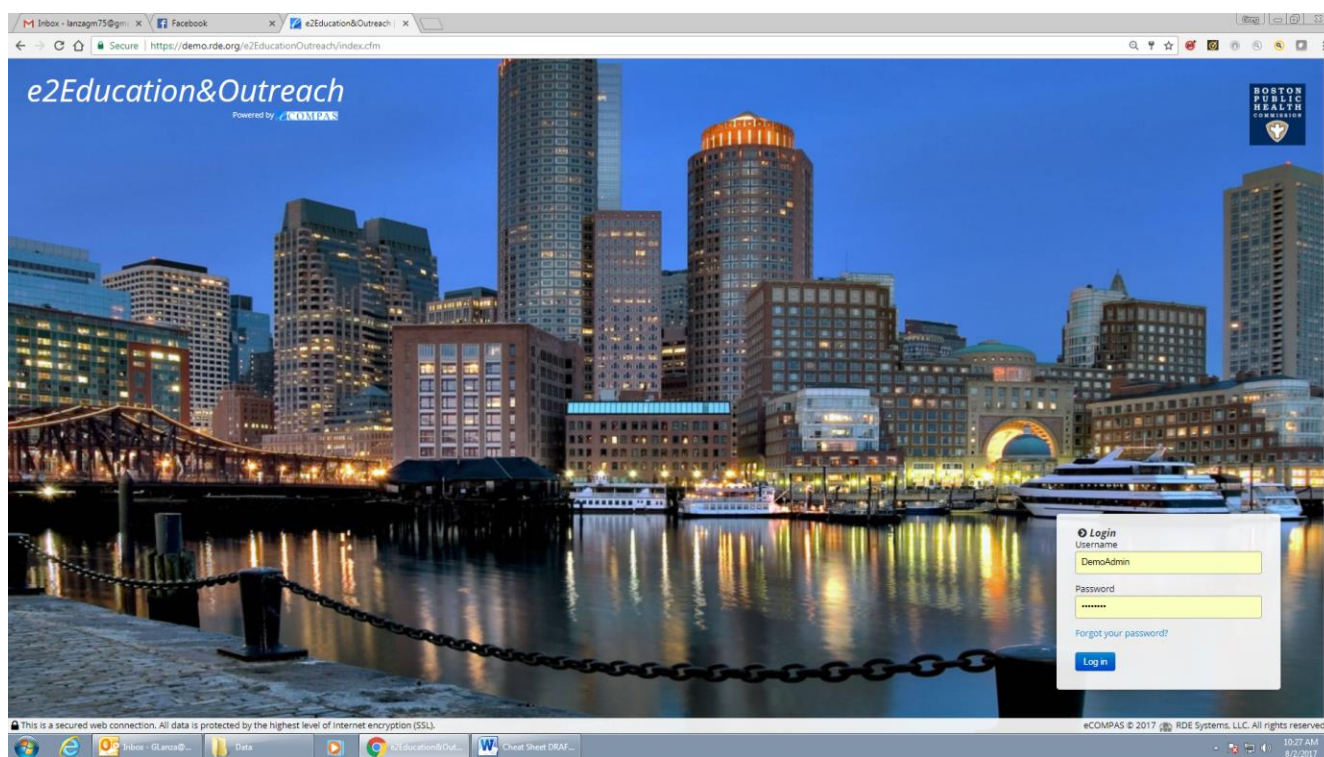


E2EducationOutreach Cheat Sheet for Users

Welcome! The following is designed to serve as an easy to follow “cheat sheet” for entering your required monthly data into the new database from RDE. Before we begin, I’d like to take an opportunity to acknowledge the hard work of both the BPHC and RDE staffs that pulled this project together in a very condensed timeline under less than ideal circumstances. We are proud of the finished product, while acknowledging that no system is or can be expected to be perfect. We hope this new system allows you to better and more easily track client progress over time, and help you demonstrate the tremendous work you do over the course of the year.

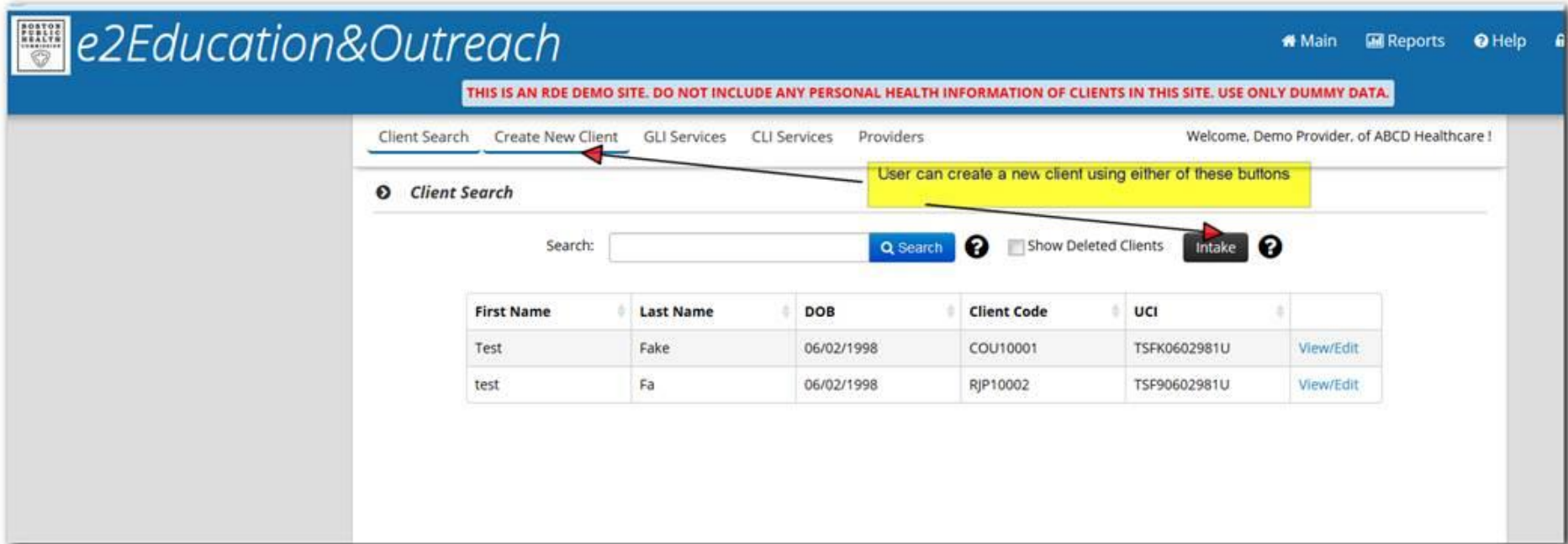
This cheat sheet is designed to accompany the larger, broader user training which can be found on the Funded Providers page of our website.



This is your home screen. You will log in here. A note about passwords: unlike with ETO, you will be able to retrieve and change your own password (more on that later). However, due to advanced security measures, it will still require an additional email to me to restore full access.

1. Client Creation

- a. Create a new client first and then you can enter ILI services under the record.



Please note: you will ONLY see this page and the options and features within if you are funded for ILI services. You cannot create clients if you only are funded for GLI or GLI/CLI interventions. Also, only users assigned to your account will be able to see client data of any kind. BPHC users will be able to see client codes and unique client identifiers, but even we will not see names.

2. Client Search

- a. All clients created for ILI services can be searched from this search box. The search box is a dynamic search feature – it searches as you type.
- b. Clients are not shared among agencies. You can only search for clients your agency has created and entered ILI services for.
- c. Click on the “?” to know what fields you can search by.
- d. You can search for deleted clients by clicking on the “show deleted clients” check box next to the search button.

The screenshot shows a web application interface for 'Client Search'. At the top, there are navigation tabs: 'Client Search' (active), 'Create New Client', 'GLI Services', 'CLI Services', and 'Providers'. On the right, it says 'Welcome, Demo Provider, of ABCD Healthcare !'. Below the navigation is a section titled 'Client Search' with a search bar, a 'Search' button, a help icon (?), a 'Show Deleted Clients' checkbox, and an 'Intake' button with another help icon (?). A 'Search Help' popup is open, providing filter syntax: 'first: First Name', 'last: Last Name', 'dob: mm/dd/yyyy', 'e2id: e2ID', and 'uci: Unique Client Identifier'. Below the popup is a table with columns: 'First Name', 'Last Name', 'DOB', and 'UCI'. The table contains two rows of data: one with 'Test', 'Fake', '06/02', and 'TSFK0602981U', and another with 'test', 'Fa', '06/02', and 'TSF90602981U'. Each row has a 'View/Edit' link next to the UCI value.

First Name	Last Name	DOB	UCI
Test	Fake	06/02	TSFK0602981U
test	Fa	06/02	TSF90602981U

3. Client Demographics and exposure categories (Transmission mode)
 - a. When you create a client, the page will allow you to view/edit data for the client that was entered during creation
 - b. Participant ID and e2ID are both auto generated. Please use e2ID to communicate with RDE if you have any questions regarding a client record. Both these IDs are non-editable.

Intake Information
ILI Services

Name	Data, Dummy
Gender	Male
DOB	08/14/1990
e2ID	GDS10016
P. ID	DMDT0814901U

Progress Notes

0

Participant Information

* First Name

Middle Initial

* Last Name

Participant ID

* Sexual Orientation

* Country of Origin

* Primary Language

* Residence Information

* Transmission Risk Factors

- IDU (Injecting Drug Users)
- MSM (Men who have sex with men)
- Sex w/Known Infected
- Sex w/High Risk Partners of Unknown Status
- Sex for Money, Drugs, Other
- Sex While High/Intoxicated
- No Known Risk Factors
- Other

* Date of Birth

* Sex at Birth

* Current Gender

E2ID

* Race

* Ethnicity

- African American
- Cape Verdean/Portuguese
- Chinese
- Haitian
- Latin American
- Puerto Rican
- Southeast Asian
- Sub-Saharan African
- Declined to answer
- Other

Save Changes

No new client duplicates. [See history of de-duplication.](#)

- 4. ILI service entry for clients
 - a. If your agency is not contracted to provide ILI services, you will not be able to access the ILI services page.
 - b. Pick a date, pick services and sub services. The Contracts field will be auto populated and click on Add service.

➤ Add Services

User: Demo Provider

Service Date: 06/29/2017 Today

Service: [Empty]

Subservice: Individual Level Intervention

Program: Education & Outreach

Contract: [Empty]

Add Service

➤ Service History

- c. Then you can add more service details and a service note if needed. ***Please do NOT add any identifying information in the service notes.***

Name	Data, Dummy
Gender	Male
DOB	08/14/1990
e2ID	GDS10016
P. ID	DMDT0814901U

Progress Notes 0

Individual Level Intervention

Event Information:

* Event Starting Time:

* Zip Code:

* Event Length:

* Event Setting:

Participant Information:

* New or Repeatable Participant:

Distributed Materials:

* Distributed Materials

- Bleach Kits
- Condoms (not included in Safer Sex Kits)
- Internal Condoms (not included in Safer Sex Kits)
- Brochures
- Role Model Stories
- Safer Sex Kits
- No Materials Distributed
- Other

* Num. Condoms:

* Num. Stories:

Referrals:

* What Referrals have been made

- Counseling/Testing/Screening
- Detox/Substance Abuse Treatment
- Health/Primary Medical Care
- Mental Health
- No Referrals Made
- Other

* Confirmed referrals

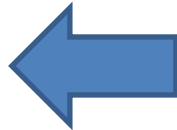
- Counseling/Testing/Screening
- Detox/Substance Abuse Treatment
- Health/Primary Medical Care
- Mental Health
- No Referrals Confirmed
- Other

Testing:

* If Participant has been tested for other diseases?:

* What diseases Participant has been tested for?

- HIV
- Hepatitis B
- Hepatitis C
- Chlamydia
- Gonorrhea
- Syphilis



Please note: for those of you who provide testing, this system allows you to track the testing received at visits over time.

- 5. Progress notes
 - a. You can track any specific notes for the client in this section so that progress notes can be entered directly in the data.
 - b. Services notes entered under ILI will also show up here for easy access and reference

Progress Notes - Dummy Data

Do not include any Protected Health Information (PHI) in this progress note.
Progress notes are not encrypted.

DD is a Latino Gay Man who lives at 1234 Providence Way in Boston. He is 28 years old

body p


Submit Progress Note






Please note only non-identifying data must be entered in this section!

- c. All the ILI services entered for that client will appear in a Service History table at the bottom of that client's page. You can edit/delete these.

Service History

Service Date:
Last 100 Visits 

10  records per page Search:

Date	Service	Subservice	Edit	Del.
06/28/2017	Individual Level Intervention	Individual Level Intervention		

Showing 1 to 1 of 1 entries

6. GLI services

- a. On the Main Screen, you can enter GLI services using the GLI services screen.
- b. Click on New Entry to enter a GLI service.
- c. All the GLI records will be stored and displayed in a table form as shown below. You can search, sort, edit, and delete the records.

The screenshot shows a web application interface for 'Group Level Interventions'. At the top, there are navigation tabs: 'Client Search', 'Create New Client', 'GLI Services' (which is active), 'CLI Services', and 'Providers'. A user greeting 'Welcome, Demo Provider, of ABCD Healthcare!' is visible in the top right. Below the tabs, there is a '+ New Entry' button and a dropdown menu set to '10 records per page'. A search bar is located to the right of the dropdown. The main content is a table with the following data:

Date of Event	Event Starting Time	Event Length	Zip Code	Event Setting	Total Number of Participants	Action
06/08/2017	7 am	0.5 hours	02108	Other	3	Edit Delete
02/10/2017	9 am	0.5 hours	02108	Correction/Detention Center	30	Edit Delete
12/01/2016	10:30 am	2.5 hours	02122	Clinical Setting	1	Edit Delete

At the bottom of the table, it says 'Showing 1 to 3 of 3 entries'. There are also navigation buttons: '← Previous', '1', and 'Next →'.

Please note: you will ONLY see this page and the options and features within if you are funded for GLI services. You cannot enter GLI data if you only are funded for ILI or ILI/CLI interventions.

The first section allows you to enter logistical information for the session (i.e. date, time, location).

User Name	Demo Admin	Provided Service	GLI - Group Level Intervention
-----------	------------	------------------	--------------------------------

Event Information:

* Date of Event	07/20/2017	* Event Setting	CBO
* Event Starting Time	4 pm	* Language	Spanish
* Event Length	4 hours		
* Zip Code	02129		
* Event Description	SISTA		

Distributed Materials:

* Distributed Materials	<input type="checkbox"/> Bleach Kits	Number of:	
	<input checked="" type="checkbox"/> Condoms (not included in Safer Sex Kits)	* Num. Condoms	40
	<input type="checkbox"/> Internal Condoms (not included in Safer Sex Kits)	* Num. Brochures	15
	<input checked="" type="checkbox"/> Brochures	Total Number	55
	<input type="checkbox"/> Role Model Stories		
	<input type="checkbox"/> Safer Sex Kits		
	<input type="checkbox"/> No Materials Distributed		
	<input type="checkbox"/> Other		

Participants Information:

* Total Number of Participants	15	* Number of New Contacts	5
--------------------------------	----	--------------------------	---

The next section is where you enter demographic information for participants.

- **Please note: Age, Gender, Sexual Orientation, Race, Country of Origin & Neighborhood of Residence MUST equal the total number of participants for the data to be saved.**


Number of Participants in Age Category:

Younger 15 Years Old	<input type="text" value="0"/>	30-39 Years Old	<input type="text" value="0"/>
15-19 Years Old	<input type="text" value="0"/>	40-49 Years Old	<input type="text" value="0"/>
20-24 Years Old	<input type="text" value="15"/>	50 Years Old and older	<input type="text" value="0"/>
25-29 Years Old	<input type="text"/>	Total Number	<input type="text" value="15"/>

Number of Participants with Gender:

The total of the participants in the Gender categories below must equal the Total Number of Participants (which is 15).

Male	<input type="text" value="15"/>	Transgender Participants who identify as Female	<input type="text" value="0"/>
Female	<input type="text" value="12"/>	Declined to Answer	<input type="text" value="0"/>
Transgender Participants who identify as Male	<input type="text" value="0"/>	Total Number	<input type="text" value="27"/>



Number of Participants Who Selected Sexual Orientation:

Bisexual	<input type="text" value="0"/>	Heterosexual	<input type="text" value="0"/>
Gay Female / Lesbian	<input type="text" value="0"/>	Declined to Answer	<input type="text" value="0"/>
Gay Male	<input type="text" value="15"/>	Total Number	<input type="text" value="15"/>

Number of Participants with Race:

American Indian / Alaskan Native	<input type="text" value="0"/>	Multiracial	<input type="text" value="0"/>
Asian / Pacific Islander	<input type="text" value="0"/>	White	<input type="text" value="0"/>
Black / African American	<input type="text" value="15"/>	Declined to Answer	<input type="text" value="0"/>
Hispanic / Latino	<input type="text" value="0"/>	Total Number	<input type="text" value="15"/>

Number of Participants with Ethnicity:

African American	<input type="text" value="3"/>
Cape Verdean / Portuguese	<input type="text" value="0"/>
Chinese	<input type="text" value="0"/>
Haitian	<input type="text" value="0"/>
Latin American	<input type="text" value="5"/>
Puerto Rican	<input type="text" value="4"/>

Southeast Asian	<input type="text" value="0"/>
Sub-Saharan African	<input type="text" value="0"/>
Declined to Answer	<input type="text" value="0"/>
Other	<input type="text" value="3"/>
Explain Other Ethnicity	<input type="text" value="Dominican"/>

Number of Participants from Country of Origin:

Brazil	<input type="text" value="0"/>
Cape Verde	<input type="text" value="0"/>
China	<input type="text" value="0"/>
Dominican Republic	<input type="text" value="3"/>
Haiti	<input type="text" value="0"/>
Nigeria	<input type="text" value="0"/>
Puerto Rico	<input type="text" value="4"/>

Somalia	<input type="text" value="0"/>
Vietnam	<input type="text" value="0"/>
US	<input type="text" value="8"/>
Declined	<input type="text" value="0"/>
Other	<input type="text" value="0"/>
Total Number	<input type="text" value="15"/>

Number of Participants with Risk Factors:

IDU	<input type="text" value="0"/>
MSM	<input type="text" value="0"/>
Sex w/ Known Infected	<input type="text" value="0"/>
Sex w/ High Risk Partners of Unknown Status	<input type="text" value="15"/>
Sex for Money, Drugs, or Other	<input type="text" value="15"/>

Sex While High/Intoxicated	<input type="text" value="15"/>
No Known Risk Factors	<input type="text" value="0"/>
Other	<input type="text" value="0"/>

Number of Participants Residing In:

Allston Brighton	<input type="text" value="0"/>
Back Bay	<input type="text" value="0"/>
Charlestown	<input type="text" value="0"/>
East Boston	<input type="text" value="0"/>
Fenway	<input type="text" value="0"/>
Hyde Park	<input type="text" value="0"/>
Jamaica Plain	<input type="text" value="0"/>
Mattapan	<input type="text" value="0"/>
North Dorchester	<input type="text" value="0"/>
Roslindale	<input type="text" value="0"/>

Roxbury	<input type="text" value="7"/>
South Boston	<input type="text" value="0"/>
South Dorchester	<input type="text" value="0"/>
South End	<input type="text" value="8"/>
West Roxbury	<input type="text" value="0"/>
Homeless	<input type="text" value="0"/>
Incarcerated	<input type="text" value="0"/>
Declined	<input type="text" value="0"/>
Total Number	<input type="text" value="15"/>

Number of Participants Referred To:

Counseling / Testing / Screening	<input type="text" value="10"/>
Detox / Substance Abuse Treatment	<input type="text" value="0"/>
Health / Primary Medical Care	<input type="text" value="0"/>
Mental Health	<input type="text" value="0"/>

Not Referred	<input type="text" value="0"/>
Other Referrals	<input type="text" value="0"/>
Total Number	<input type="text" value="10"/>

Number of Participants with Referrals Confirmed:

Counseling / Testing / Screening	<input type="text" value="5"/>
Detox / Substance Abuse Treatment	<input type="text" value="0"/>
Health / Primary Medical Care	<input type="text" value="0"/>
Mental Health	<input type="text" value="0"/>

No Confirmed Referrals	<input type="text" value="0"/>
Other Referrals	<input type="text" value="0"/>
Total Number	<input type="text" value="5"/>

Cancel Save

Please note that these are side by side just for the sake of the formatting here. They will be one long continuous screen.



Click here to save or cancel the entry.

7. CLI services

- a. On the Main Screen, you can enter CLI services using the CLI services screen
- b. Click on New Entry to enter a CLI service.
- c. All the CLI records will be stored and displayed in a table form as shown below. You can search them, sort them, edit and delete the records.

Client Search Create New Client GLI Services CLI Services Providers Welcome, Demo Provider, of ABCD Healthcare !

Community Level Interventions

[+ New Entry](#)

10 records per page Search:

Date of Event	Event Starting Time	Event Length	Zip Code	Event Setting	Total Number of Participants	Action
06/09/2017	7 am	0.5 hours	02108	Other	50	Edit Delete
06/08/2017	7:30 am	1 hour	02109	After School Program	2	Edit Delete
06/08/2017	7:30 am	1 hour	02111	After School Program	2	Edit Delete
06/08/2017	7:30 am	1 hour	02116	Drop in Center	3	Edit Delete
06/07/2017	7 am	1 hour	02110	After School Program	7	Edit Delete
06/03/2017	8:30 am	1 hour	02134	Hair Salon/Barber	2	Edit Delete

For CLI services, as with the prior system, no demographic information is tracked; only logistics.

Community Level Interventions

Editing Entry | Community Level Interventions

User Name **Demo Admin** Provided Service **CLI - Community Level Intervention**

Event Information:

* Date of Event: 07/20/2017
* Subtype of CLI Intervention: Community Event
* Event Starting Time: 12:30 pm
* Event Length: 4 hours

* Zip Code: 02108
* Event Setting: Drop in Center
* Language: English

Distributed Materials:

* Distributed Materials:

- Bleach Kits
- Condoms (not included in Safer Sex Kits)
- Internal Condoms (not included in Safer Sex Kits)
- Brochures
- Role Model Stories
- Safer Sex Kits
- No Materials Distributed
- Other

Number of:

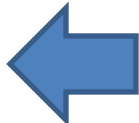
* Num. Condoms: 15
* Num. Stories: 15
Total Number: 30

Participants Information:

* Total Number of Participants: 15
* Number of Direct Contacts: 15

* Event Description: Peer Leader Orientation

Cancel Save



Number boxes will only show if the corresponding item is selected

8. Client de-duplication and merge feature

- a. To create a new client, you have to search existing clients to identify potential duplicates before the system will allow you to create a new one. If the system finds potential matches, it will display a list of these matches. You can select the client you wish to proceed with or you can create new one if you think the client record is not a duplicate of the existing client.
- b. The duplicate /potential matches will appear under the client record for users.
- c. You can either mark them as not a duplicate, in which case the system will not show them as duplicates or merge the records. Merging will take you through each screen and will allow you pick the correct data. The ILI services from both the records will be in the merged client record.
- d. Differences in the two records will be highlighted in red as shown below.

Name Fake, Test
Gender Male
DOB 06/02/1998
e2ID COU10001
P. ID TSFK0602981U

tested for?

- Hepatitis C
- Chlamydia
- Gonorrhea
- Syphilis

Save Changes

1 new potential duplicates found. See history of de-duplication.

Progress Notes 0


Client Duplicates

Client Name: test Fa	Date of Birth: 6/2/1998
Similarity Score: 89%	
Status: Potential Duplicate	
Action: <input type="button" value="Merge"/> <input type="button" value="Not Duplicate"/>	

Delete Client

Delete this client

Name Fake, Test
Gender Male
DOB 06/02/1998
e2ID COU10001
P. ID TSFK0602981U

 Progress Notes 0

Client Intake Information

Note: when two clients are merged, any past information stored in each client's record become part of the merged record's history. The following screens let you select which demographic and HIV status information is correct, which then becomes the merged record's *current* values. Any other information contained in each client's record becomes part of the merged record.

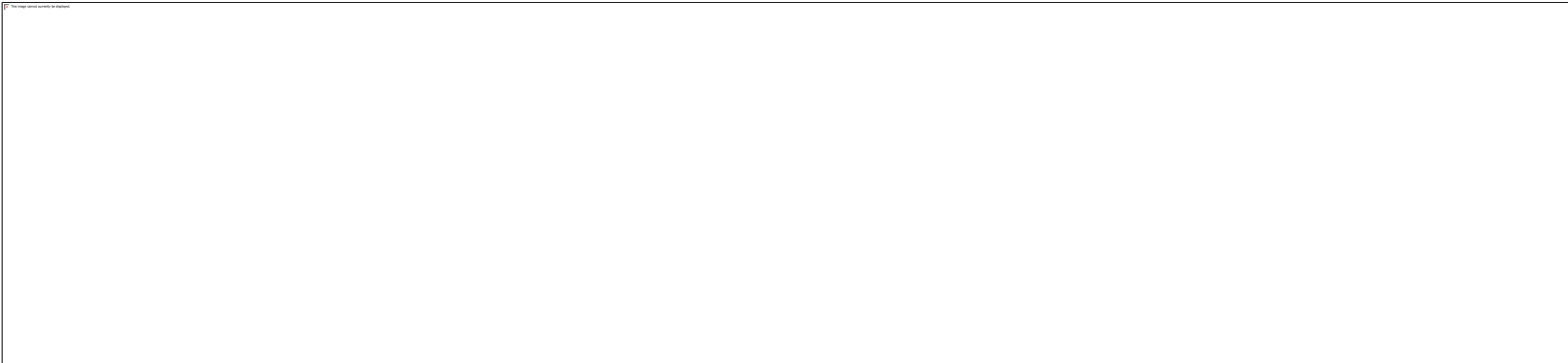
Use Data From:

Older Record Newer Record Edit Data

	Older Record	Newer Record
First Name	Test	test
Middle Initial	(not specified)	(not specified)
Last Name	Fake	Fa
Date of Birth	06/02/1998	06/02/1998
Participant ID	TSFK0602981U	TSF90602981U
E2ID	COU10001	RJP10002
Sex at Birth	Male	Male
Current Gender	Male	Male
Sexual Orientation	Heterosexual	Bisexual

9. Client record delete and undelete deletion capability

- a. You can delete the client record using the “Delete” button in the Intake Information page
- b. You can also undelete the client record by search for deleted clients on the search screen and clicking on the un-delete button.

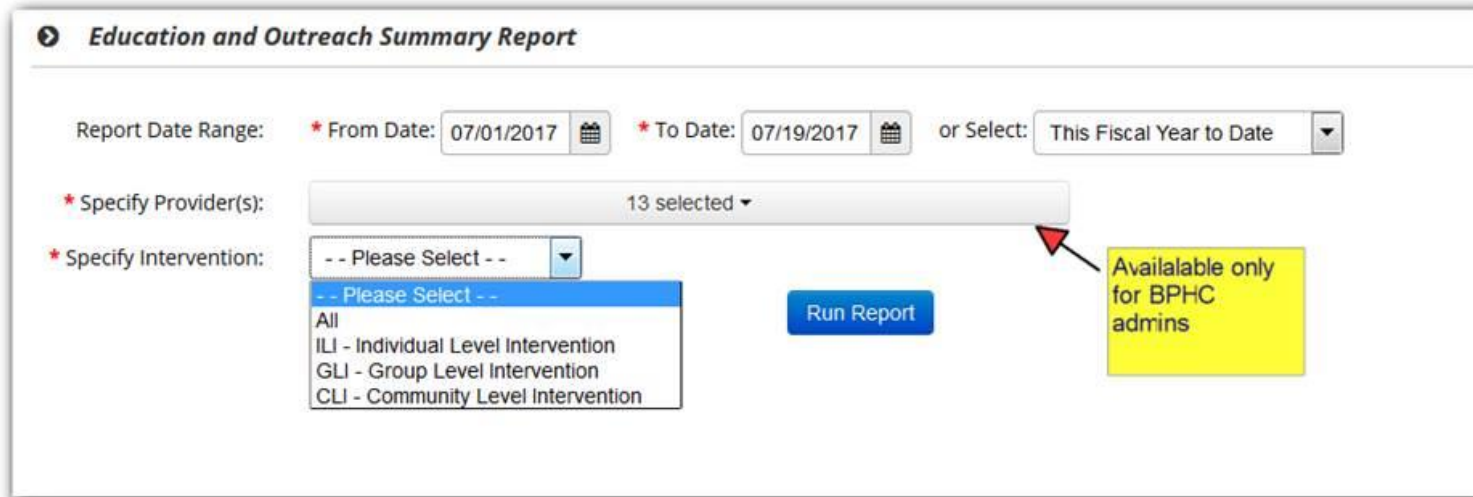


10. ILI/GLI/CLI Report

a. The reports are available under the Reports section



b. There are date filters which match the time period for the services entered into the system.



- c. Pick the service you want to run this report for
- d. Export to excel and Print options are available too.

Education and Outreach Summary Report

Report Date Range: * From Date: 07/01/2017 * To Date: 07/19/2017 or Select: This Fiscal Year to Date

* Specify Provider(s): 13 selected

* Specify Intervention: All

Run Report

CLI, GLI and ILI Events Overall Summary **Print**

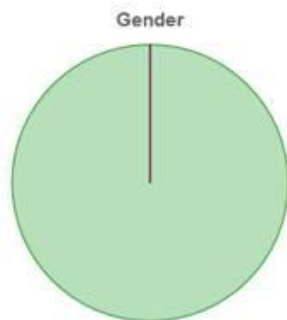
Export to Excel

Numbers by Type of Intervention		Materials Distributed	
CLI - Community Level Intervention: Community Events	1	Bleach Kits	0
CLI - Community Level Intervention: Mobile Encounters	0	Condoms	40
GLI - Group Level Intervention	1	Internal Condoms	0
ILI - Individual Level Intervention	2	Brochures	0
Total:	4	Role Model Stories	0
		Safer Sex Kits	0
		Other	0
		Total:	40

Export to Excel

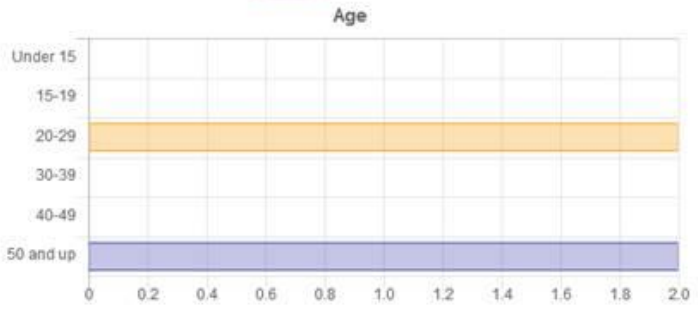
ILI Demographic Summary

Print



Export to Excel

Gender	Number	%
Declined Gender	0	0.00 %
Female	0	0.00 %
Female - Identified Transgender	0	0.00 %
Male	4	100.00 %
Male - Identified Transgender	0	0.00 %
Total:	4	100.00 %



Export to Excel

Age	Number	%
Under 15	0	0.00 %
15-19	0	0.00 %
20-29	2	50.00 %
30-39	0	0.00 %
40-49	0	0.00 %
50 and up	2	50.00 %
Total:	4	100.00 %