First 5 Fresno County
Persimmony Training Manual
Fiscal

September 2011

First 5 Fresno County Training Manual

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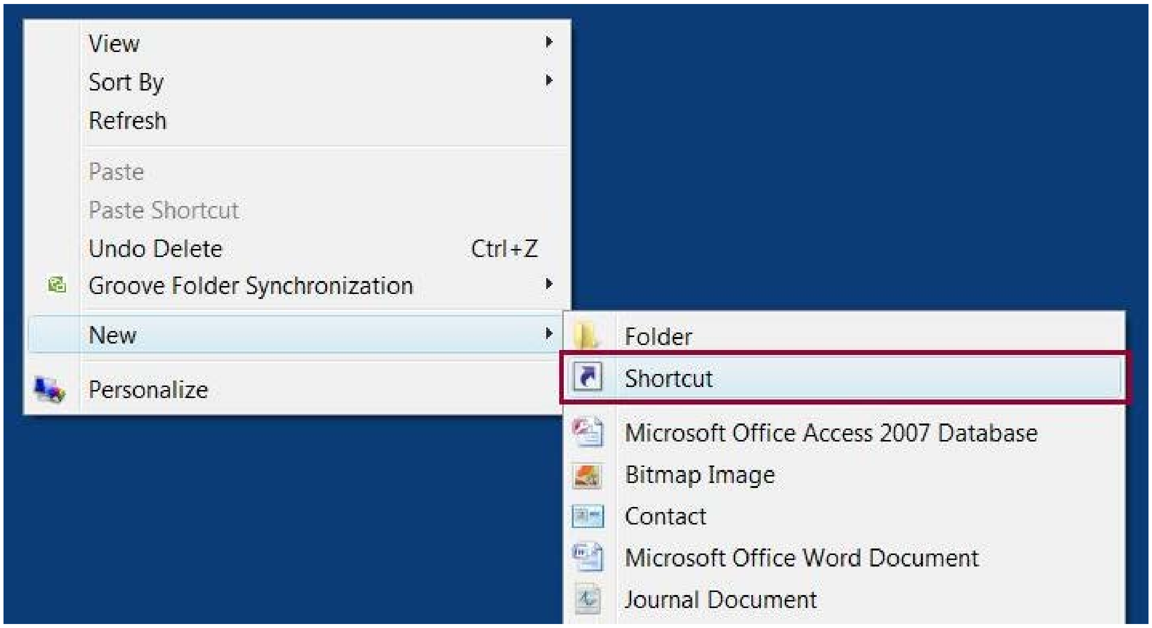
I. Setting Up Persimmony

****Please be sure that before you commence data entry or a training via shadow session that you follow these steps.**

Persimmony Shortcut Setup

Steps:

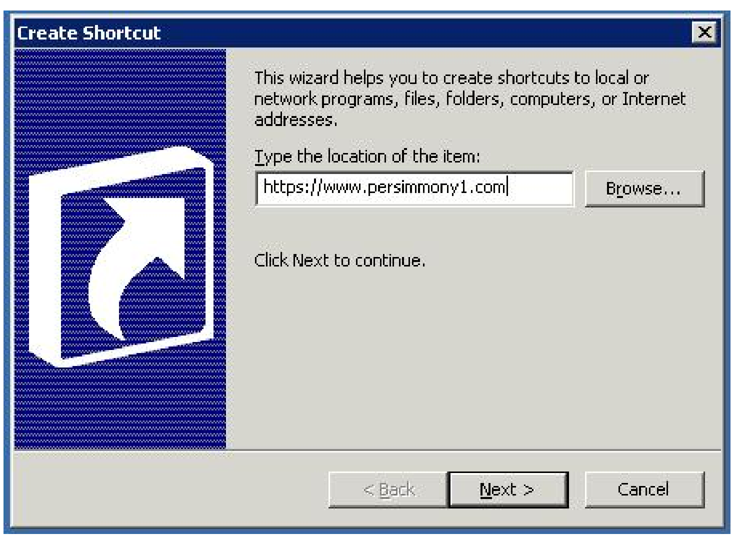
1. From the desktop, **right-mouse click on a blank area.**
2. A dialog box will appear. **Move the cursor over – New and left click on – Shortcut:**



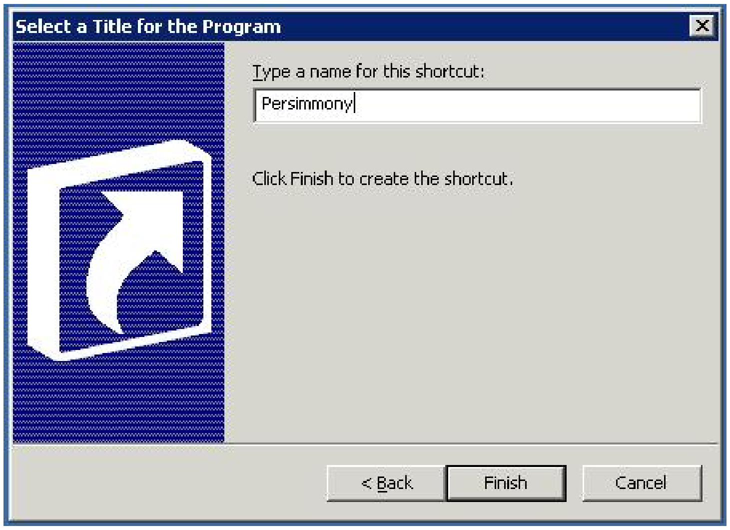
4. Type the URL for Persimmony in the box titled "Type the location of the item:" Hit Enter.

5. **Persimmony URL: https://www.persimmony1.com/**

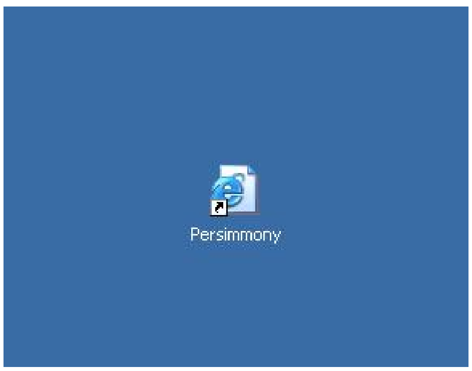
6. and click **Next** to continue.



7. Type a name for the shortcut "**Persimmony**."



8. Click **Finish** and the new shortcut icon will appear on the desktop.



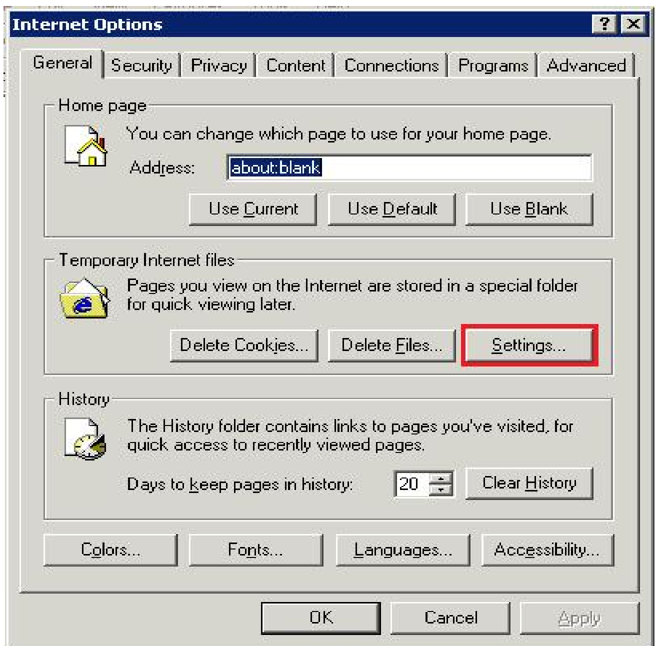
Temporary Internet File Size

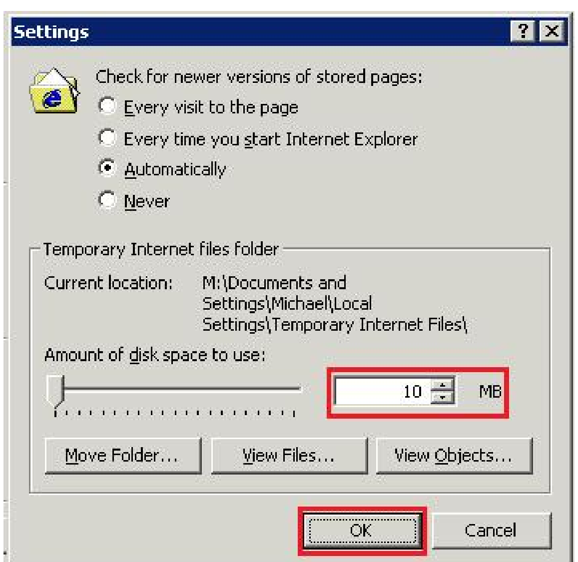
In order for the Persimmony software to run properly, please change the temporary internet files setting to 10MB.

Steps:
1. Open Internet Explorer.

2. Click on **Tools – Internet Options.**

3. Click on **Settings** under the **Temporary Internet files.**



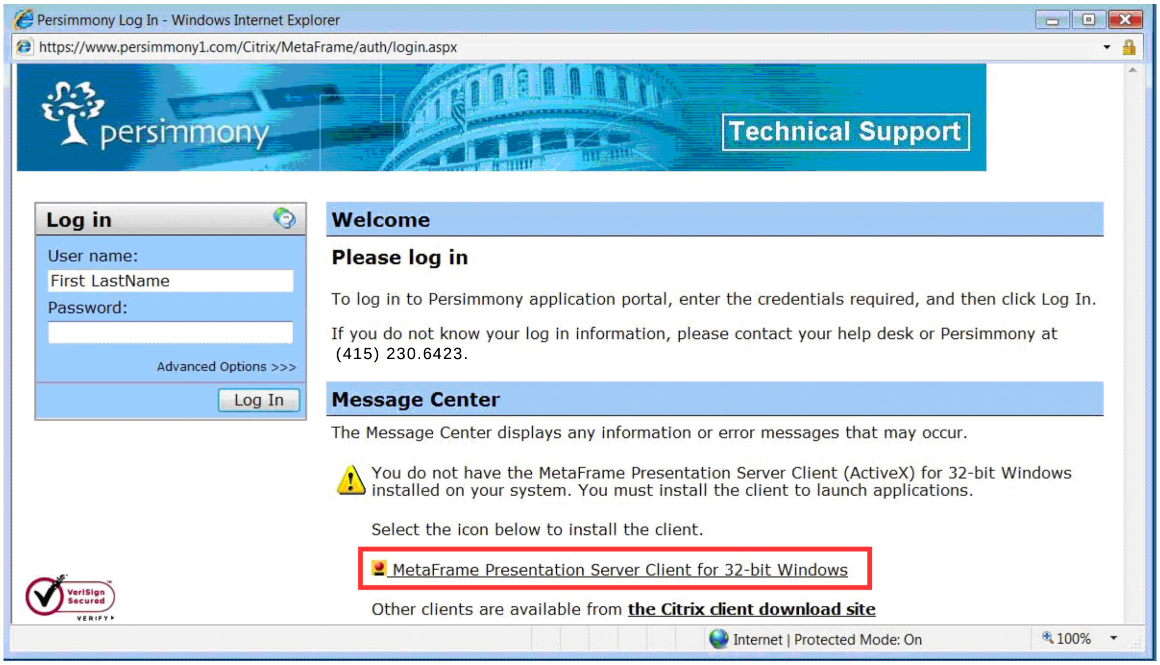


4. Change the file size to 10MB.

You are now ready to go to the Persimmony site, logon and install the Citrix add on. Click on the Persimmony short cut you just created.

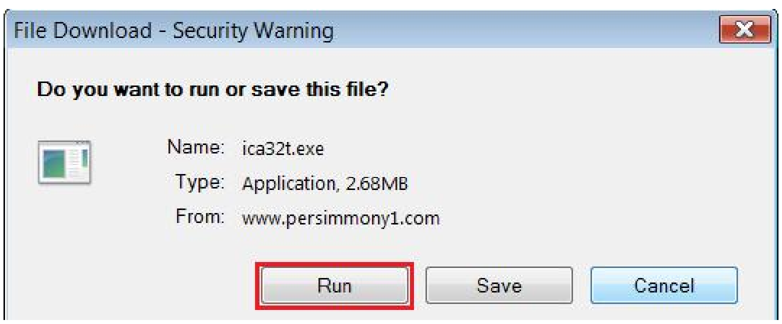
Citrix Client Install

In order for the Persimmony software to run properly, Citrix must be installed. If the following error message appears, please load the Citrix add on as shown below:

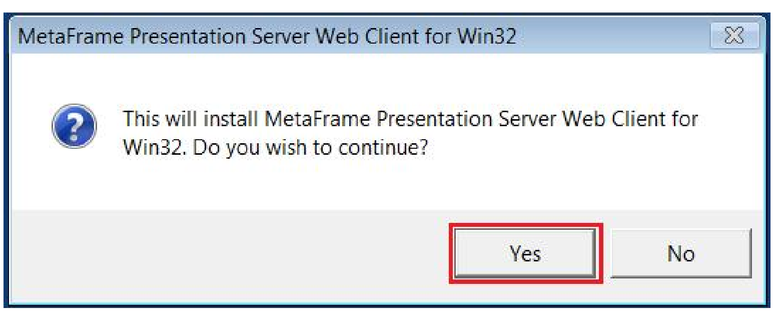


Steps:
1. Click on the MetaFrame **Presentation Server Client for 32-bit Windows** link.

2. The following box will appear; click on **Run.**



3. Click on **Yes**



4. Once the install is complete, close the browser and then click on the Persimmony shortcut located on the desktop to launch software.

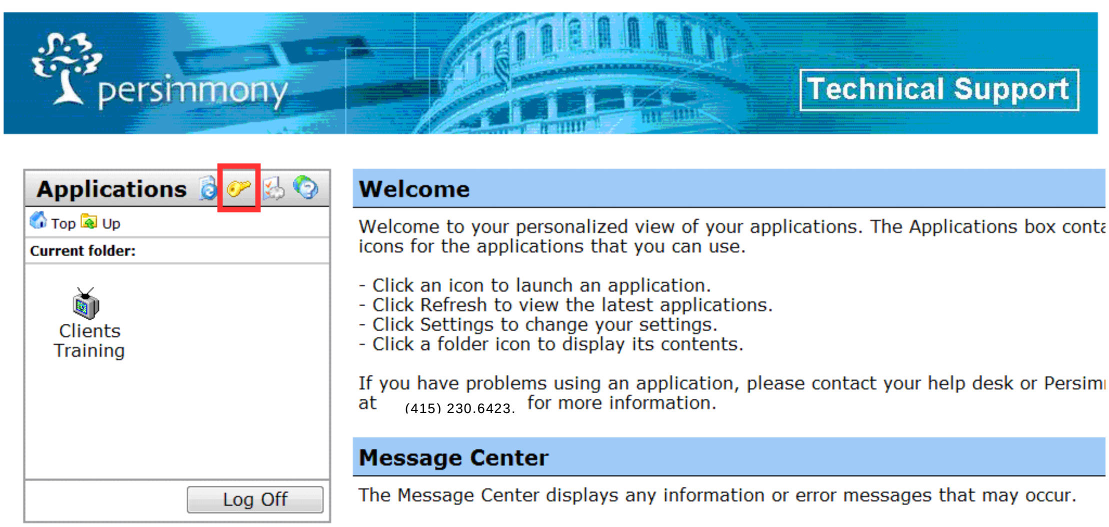
Persimmony Log In

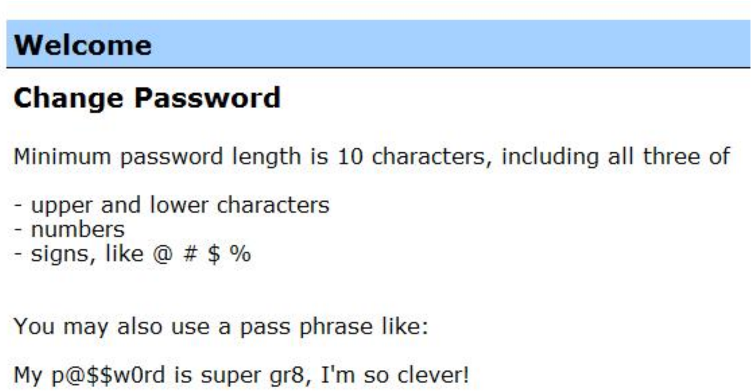
Steps:
1. To obtain access to Persimmony all users must submit a User Log-in form to their Program Officer.
2. First time users are assigned a default password, which you are required to change after initial login and are also required to participate in a tutorial/training in order to obtain security access.
3. Click on the Persimmony icon located on the desktop.
4. Enter the assigned user name (not case sensitive) and password; (*YOUR USER NAME IS YOUR FIRST (SPACE) LAST NAME).*

Congratulations! You are now logged into the First 5 Fresno County database!

Changing the Password

Steps:
1. Click on the golden key to change password: As mentioned previously all users are required to change the default password to a unique confidential password after initial login.

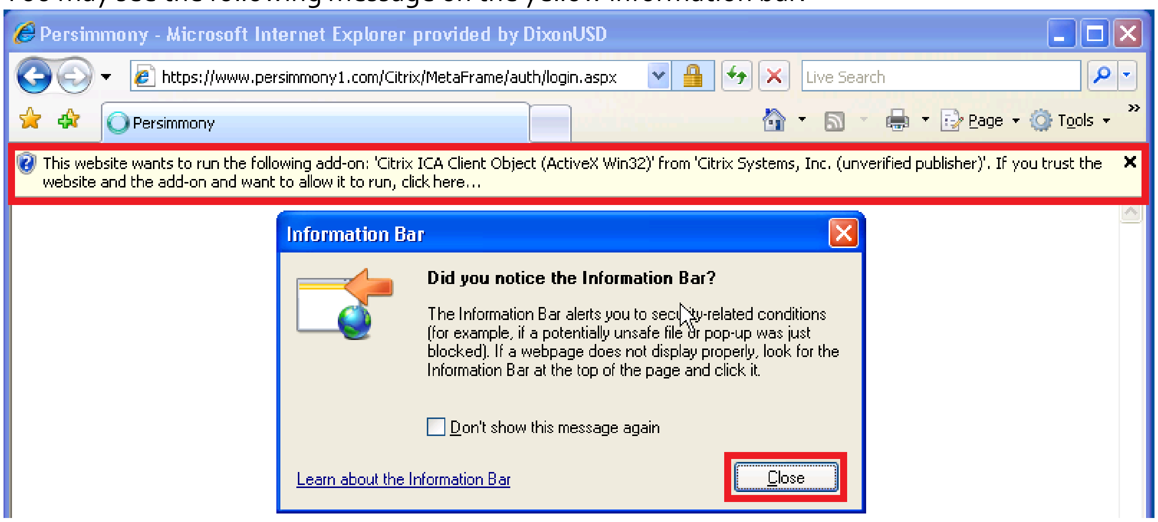




Note: You may change your password more than once, but it is not required. DO NOT share your password with ANYONE, not even your co-workers. If you forget your password contact Persimmony support for assistance.

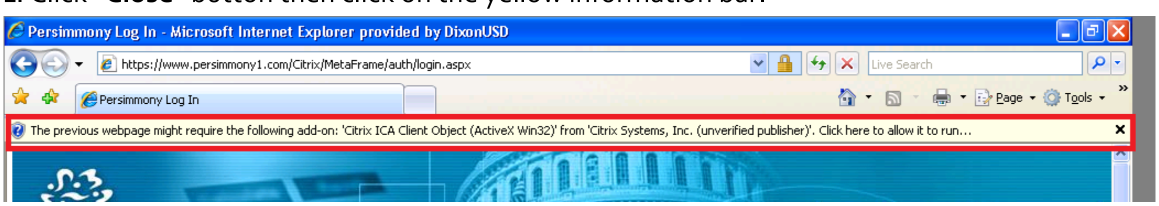
Installing the Required ActiveX Control (Internet Explorer 7+ Only-this is the software that is required to run the database.)

You may see the following message on the yellow information bar:

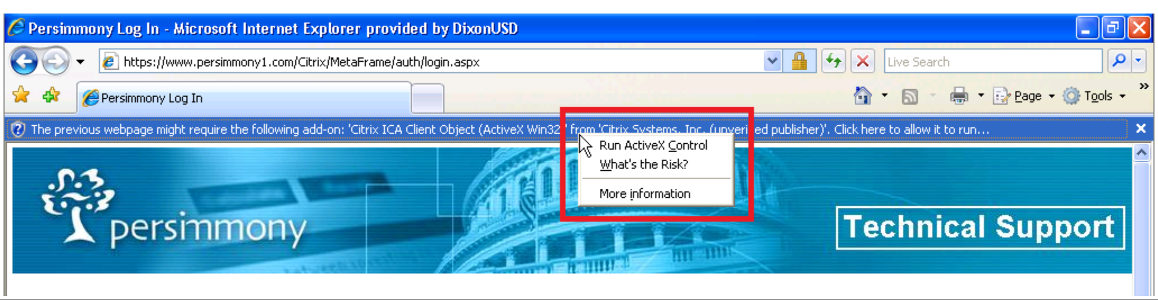


Steps:

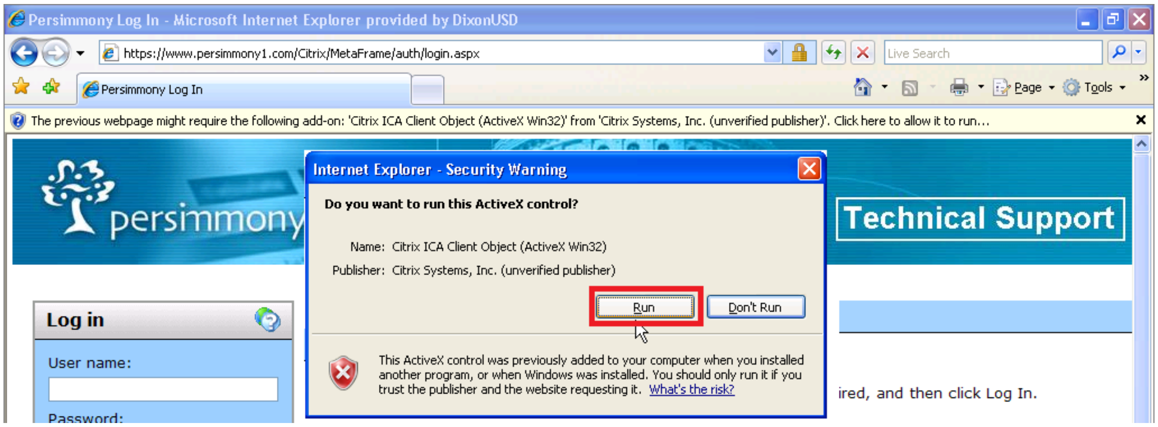
1. Click "**Close**" button then click on the yellow information bar.



2. Then select "**Run Active Control.**"



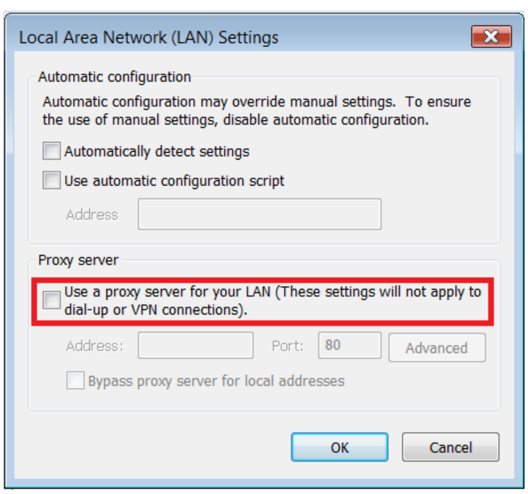
3. Click "**Run**" when prompted.



Typical Connection Issues

The following identify common issues users encounter when trying to connect to Persimmony:

- **Cannot complete installation of Citrix client. File copy errors.** Installation requires Administrative rights to computer. Contact *your* local IT for support.
- **Cannot connect to the Citrix server:** Most commonly this is caused by the Norton Firewall/Internet security. Try to disable it to see if that is the problem. Call *your* local IT support to see if the local firewall is blocking Citrix traffic.
- **Cannot connect because of "Proxy Detection Failure" or other "Proxy"errors.** In Internet Explorer, click on Tools, then Internet Options, Connections, LAN Settings. Uncheck "Proxy Server."



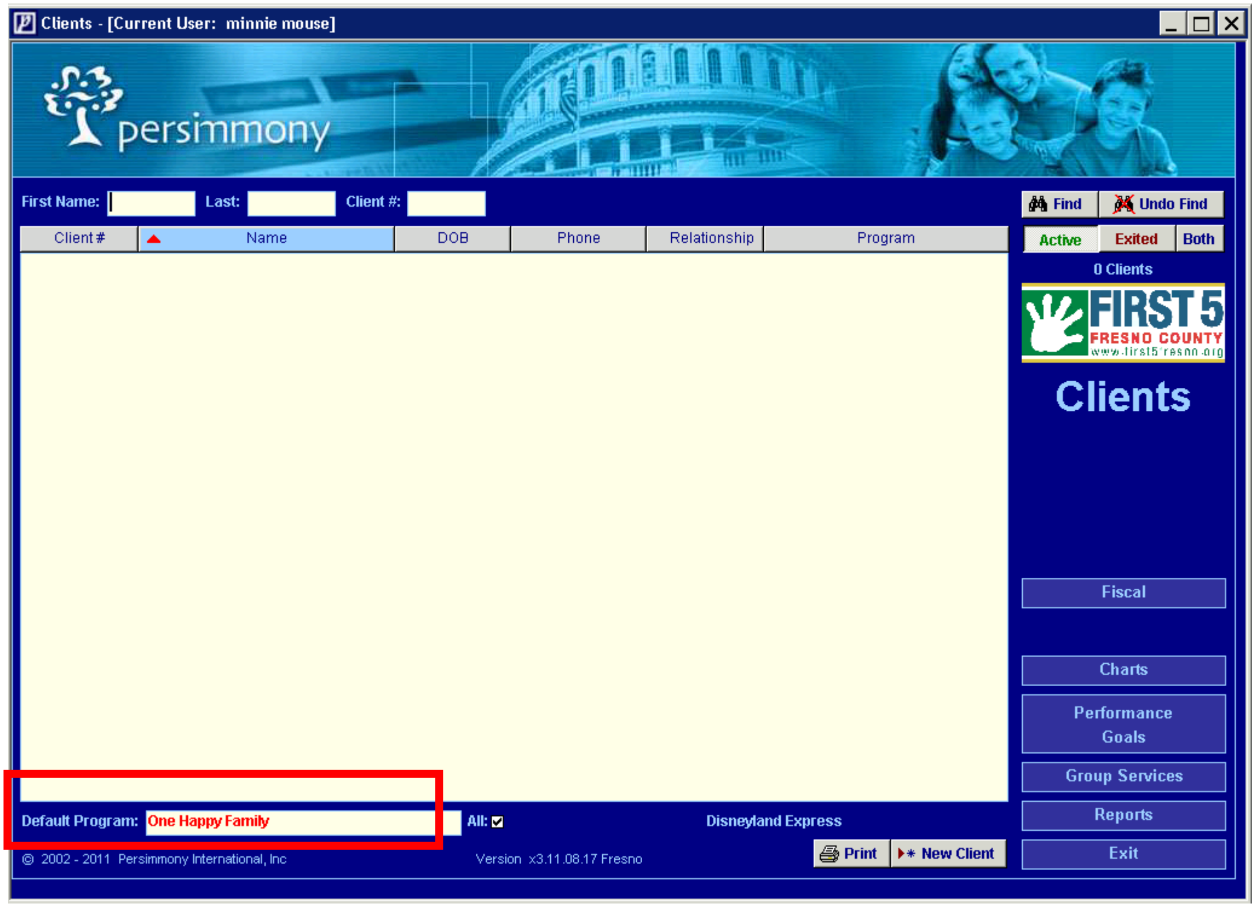
- **Cannot see whole application screen:** Please set screen resolution to 1024x768 or higher. If assistance is required please contact *your* local IT for support. Restart the application.
- **Cannot select another printer:** You can print only to the default printer. Set the printer that you want to use as a default printer and then restart the application. If assistance is required please contact *your* local IT for support.

II. Using Persimmony

****When using Persimmony ALWAYS remember to EXIT each module/screen as opposed to "Xing" out as is customary when using or surfing the web.**

Main Core Client Screen

This is the first screen you will see when you open Persimmony. Any clients entered by your program will appear here. If your user account has access to multiple programs, the clients from those programs will also be displayed.

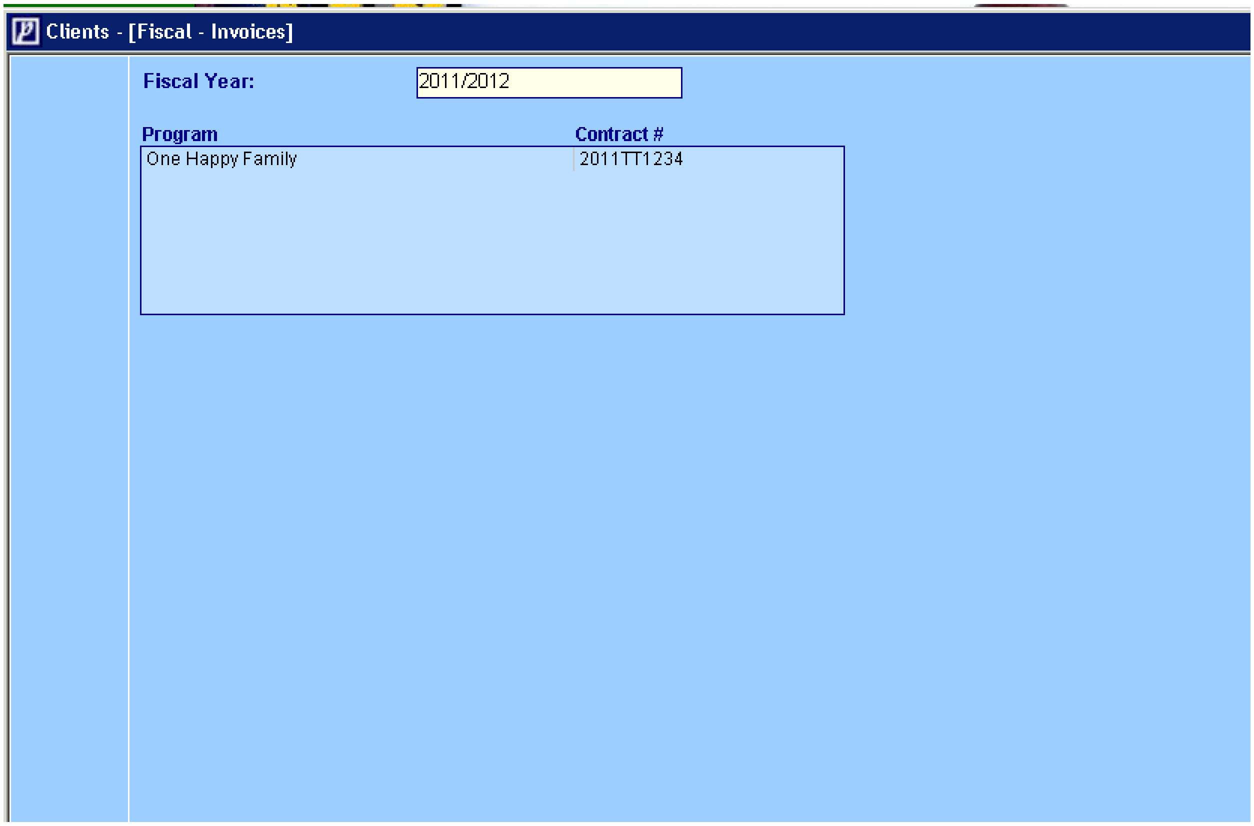


PLEASE NOTE: *__ALWAYS__ check to make sure that the* ***"Default Program:"*** *field is displaying the correct program __BEFORE__ entering any data to avoid data entry errors.*

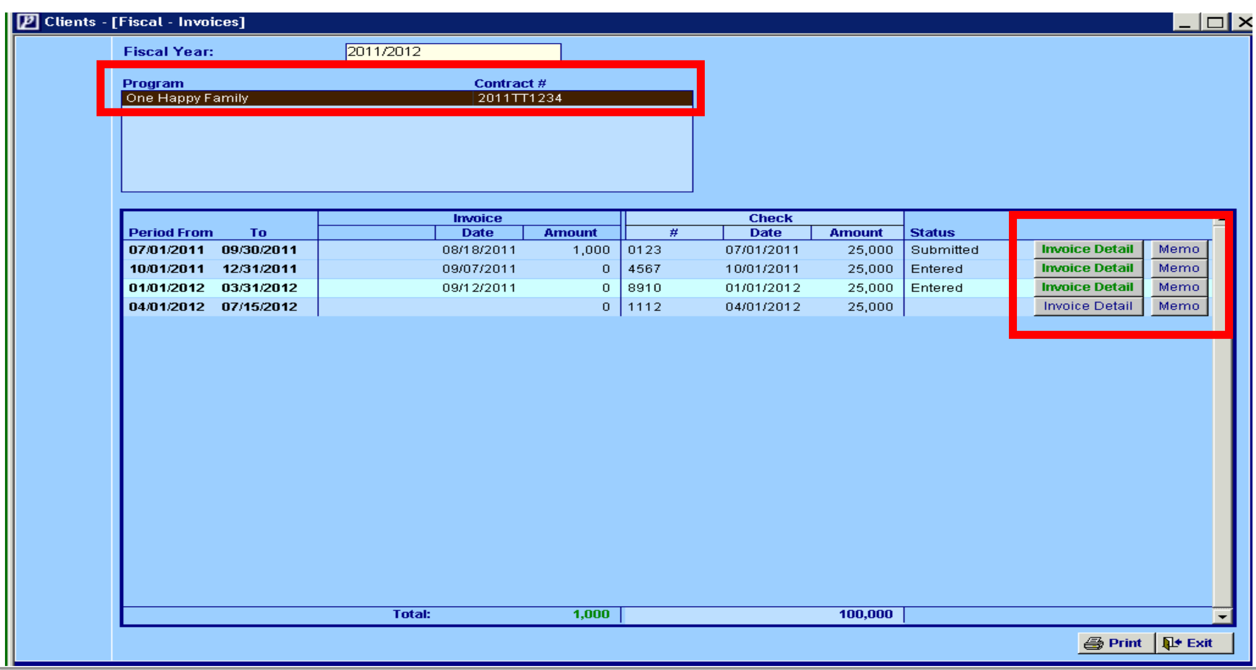
Reviewing/Entering Fiscal Documents

1. To enter or review any fiscal documents click the FISCAL tab on the right hand corner of the client screen. See image.

2. Once the tab is selected, the following screen will appear. All relevant information pertaining to your contract(s) will appear here. Programs are listed by their program name and the contract number issued by First 5 Fresno. Please also note that the FY will always be the current FY. Once entries have been made for multiple fiscal years, you will have access to these as well simply by scrolling in the ***Fiscal Year*** box.



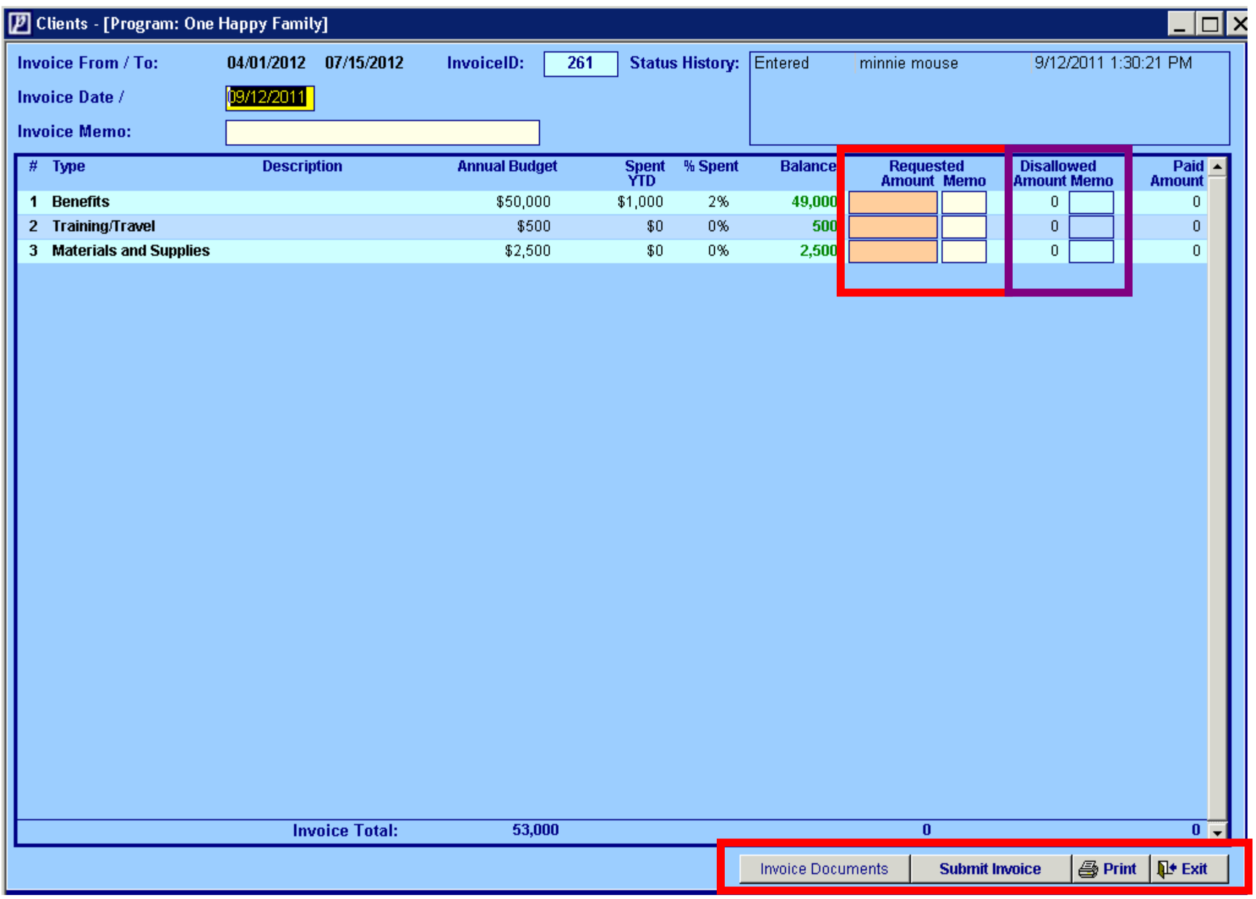
3. To commence entry/and or revisions select the appropriate contract by hovering over the Program Name or Contract number and clicking on it. Once you have selected the program, the relevant information to this contract will populate in the remaining space of the screen.



4. The fiscal information for the contract will be broken down as entered by your Fiscal Program Officer. In the example above it has been broken down by 4 quarters typical of the FY.

5. The Invoice Detail tab will provide you access to the corresponding invoice information once selected. The Memo button to the immediate right of the Invoice Detail tab will allow you to enter a memo or read one that may have been previously entered by you or whoever has been granted access to this information. Once information has been entered or modified in either the invoice or the memo, the tabs will change color indicating an entry has been made.

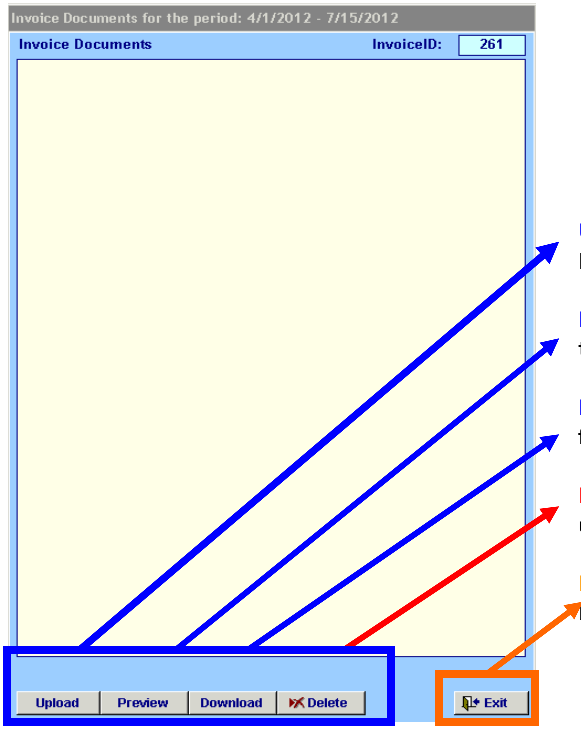
6. Once the Invoice Detail tab has been selected for the quarter or specific date range that you wish to view the invoice will populate with the information that has been entered by the Fiscal Program Officer; at this time you will be able to review the information and make requests with regard to your budget or enter/read any memos. ***You will not be able to enter any information in the Disallowed Amount Memo column as this is reserved for the Fiscal Program Officer.***



7. At the bottom of this screen there will appear 4 tabs;

A. Invoice Documents
B. Submit Invoice
C. Print and
D. Exit

A). **Invoice Documents**; if previously uploaded these documents will appear here and you will have options to **UPLOAD, PREVIEW, DOWNLOAD** and **DELETE** documents.



UPLOAD Tab: Allows documents to be uploaded to Persimmony.

PREVIEW Tab: Allows documents that have been uploaded to be previewed.

DOWNLOAD Tab: Allows documents to be downloaded from Persimmony.

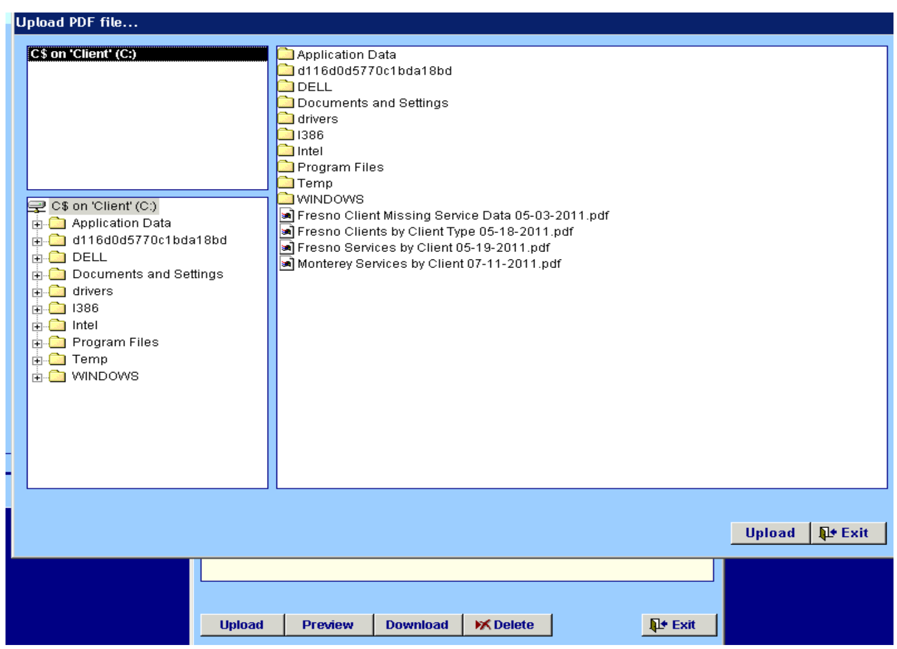
DELETE Tab: Allows you to delete documents previously uploaded.

EXIT Tab: When selected will exit you from this screen and back to previous screen.

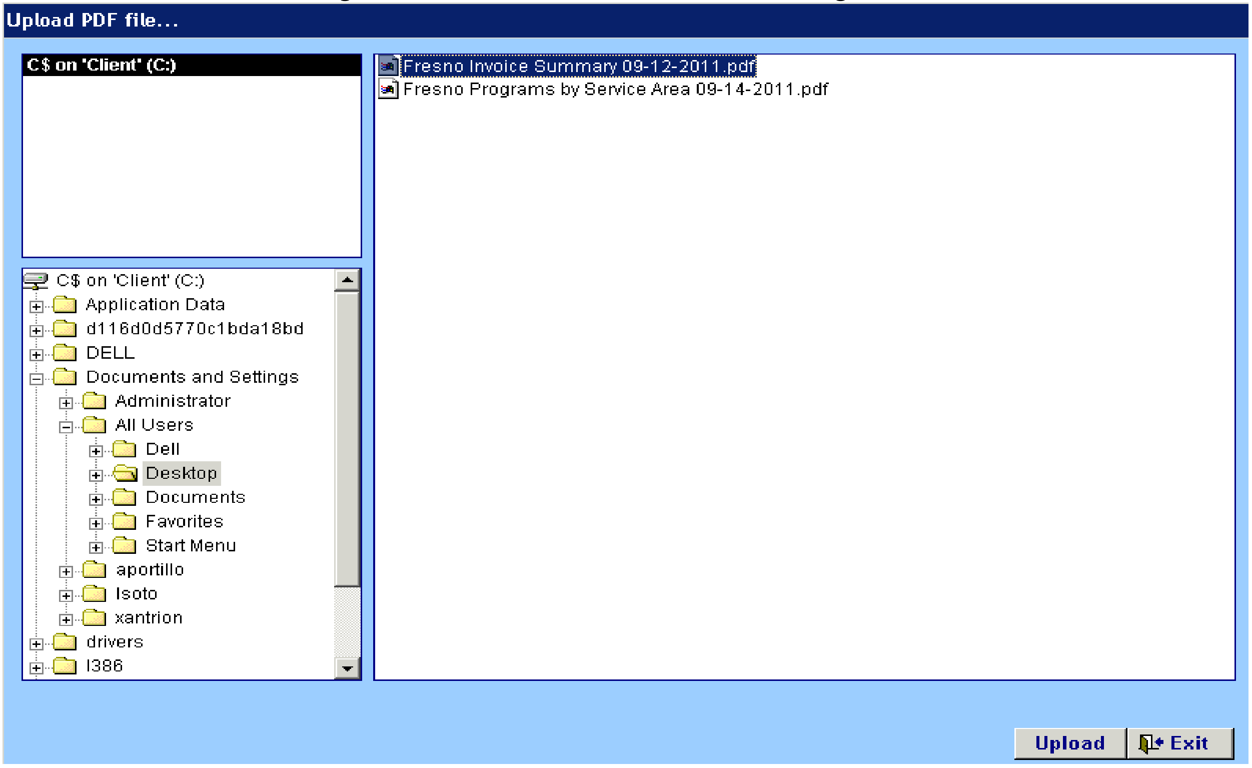
B). **Submit Invoice** will allow you to submit an invoice request for approval by the designated person.
C). **Print** will allow you to Print the invoice.
D). **Exit**; when you are done and ready to exit this page (or any other page accessed), be sure to use the **EXIT** tab and not "Xing" out like normally done when surfing the wed.

Uploading/Downloading Documents

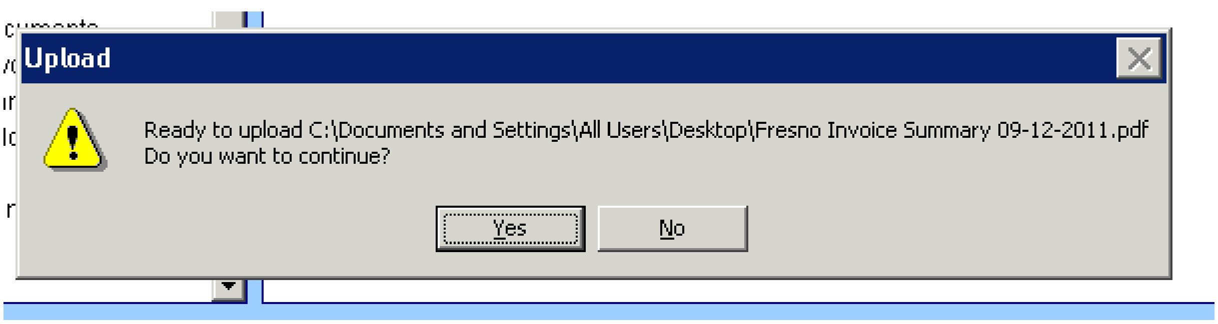
When the Invoice Documents tab is selected as mentioned above, a new screen will open (see image above) and 5 tabs will appear. Selecting the UPLOAD tab will allow you to upload documents that need to be attached. The following screen will appear:



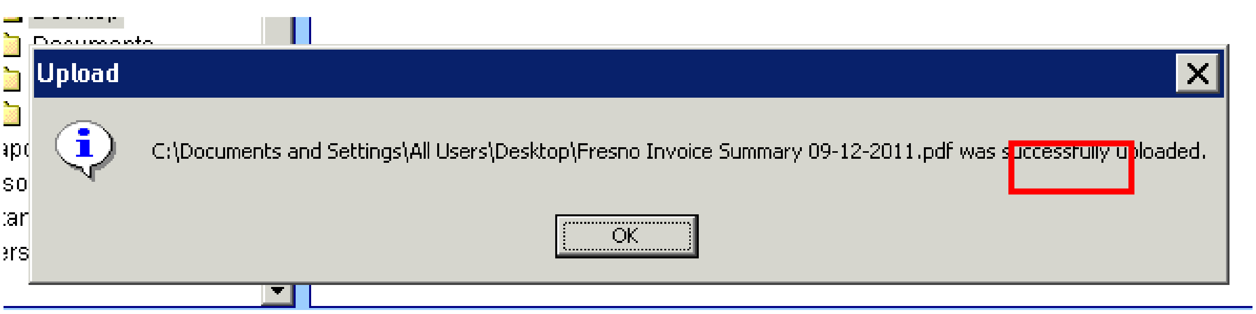
When this screen appears you will need to choose the drive or folder the document needs to be uploaded from. Once you have made the appropriate selection of the drive or folder and see the document that you need to upload, select the document by clicking on it (will be highlighted in black) with the mouse and selecting the **UPLOAD** tab located in the lower right side of the screen.



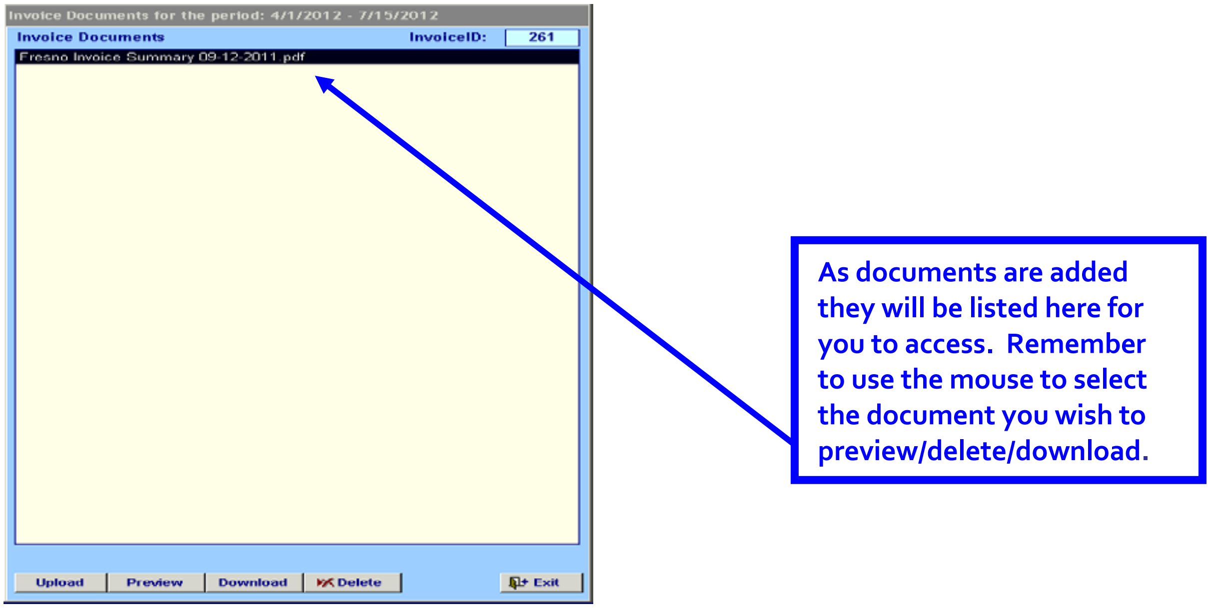
Once the UPLOAD tab is selected the following pop-up will come up:



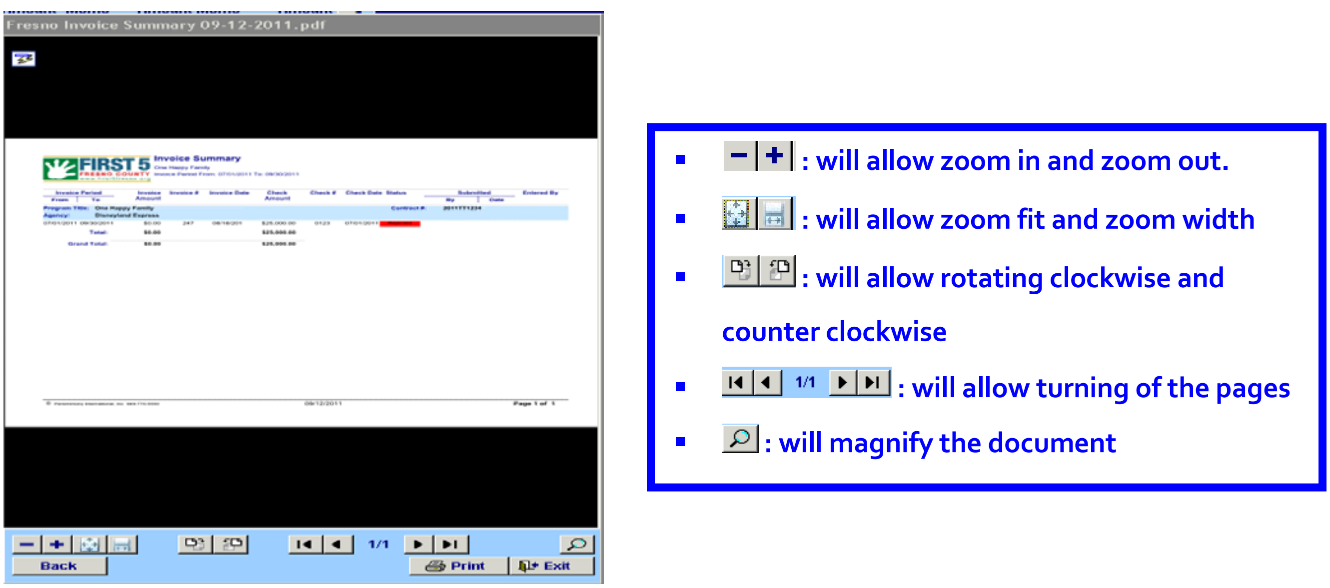
After selecting YES to continue with the upload the next pop-up will follow notifying you that the UPLOAD has been successful:



The document that was uploaded will now be listed in the **Invoice Documents** Screen ready for you to PREVIEW/and or DELETE.



The PREVIEW tab once selected will bring up the following screen:



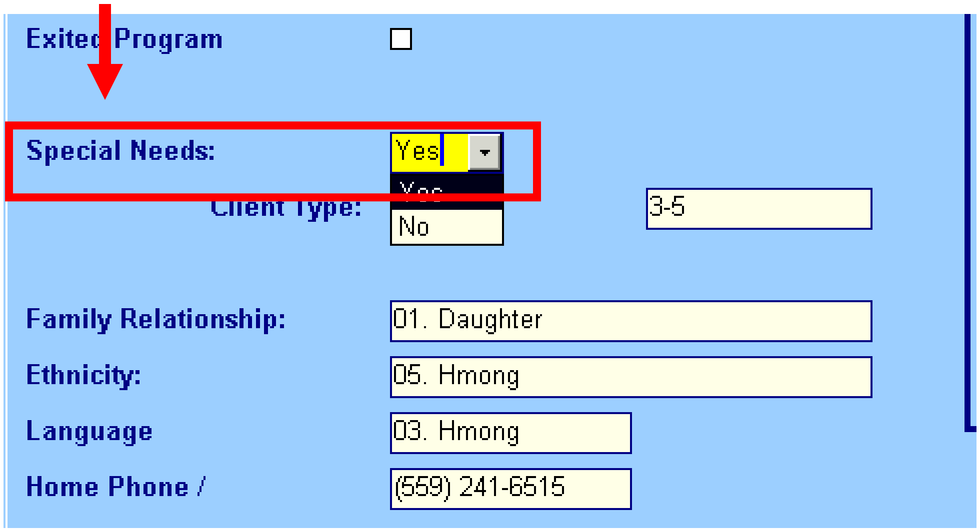
Reports

The Special Needs field allows the user to track children with special needs in the client module. To track children with special needs, follow the steps below:

Steps:

1. Click on the field labeled "Special Needs."
2. A drop down menu will appear with the following answers: "Yes and "No."

3. Select **the most appropriate** response for the client you are entering in Persimmony. For example , if the child has a special need the appropriate value for this field would be "Yes." If a child does not have a special need the most appropriate value for this field would be "No."



Please note: *The Special Needs field **<u>will only</u> come up for core clients that are 0 to 5 years old**. Programs will be **required to enter a response** for this field for every core client that is 0 to 5 years old.*

First 5 Fresno County will use the First 5 California's definition of special needs for Persimmony tracking purposes. First 5 California defines children with special needs as having one of the following:

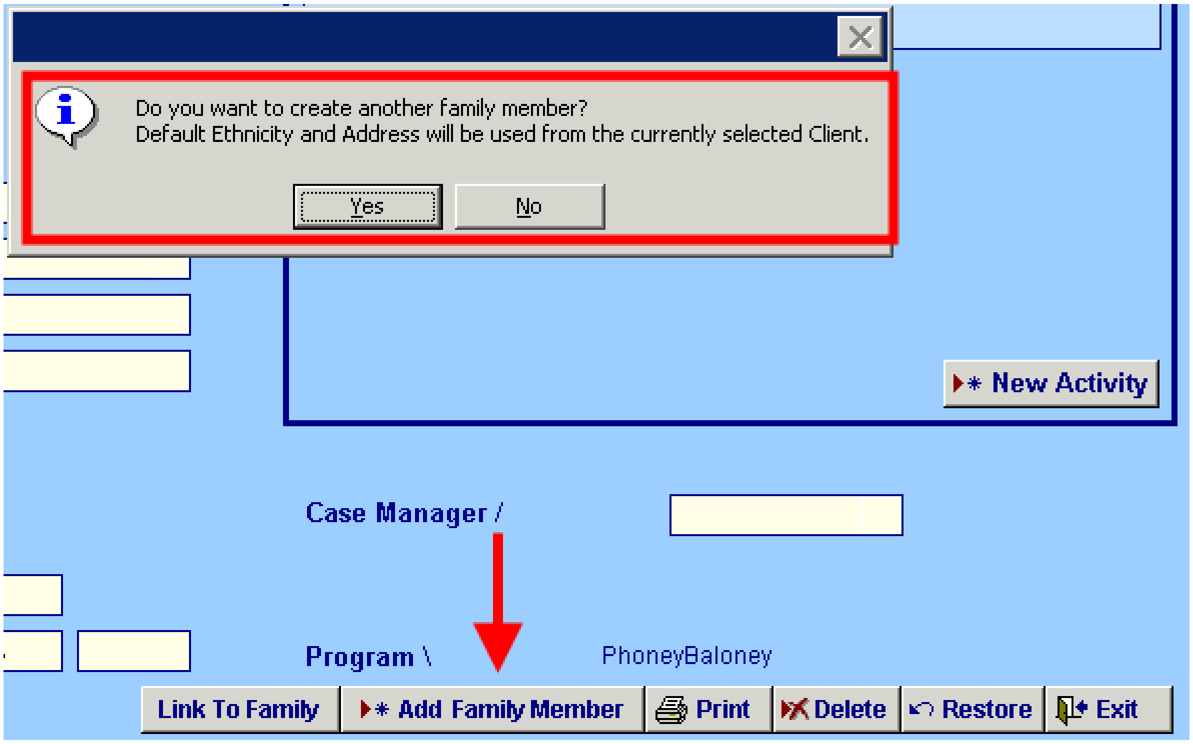
- *Children with identified disability, health, or mental health conditions requiring early intervention, special education services, or other specialized services and supports; or*
- *Children without identified conditions, but requiring specialized services, supports, or monitoring.*

Examples of children with special needs include:

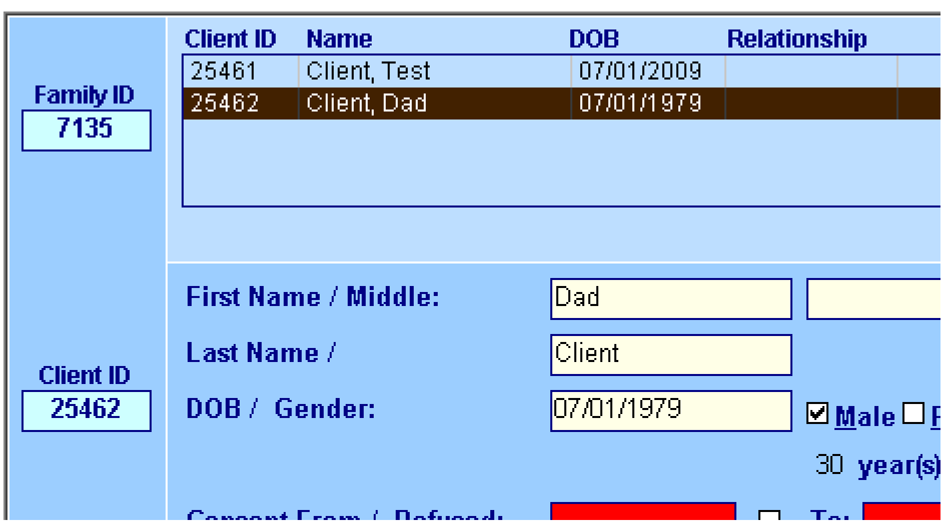
- *Children with IEPs*
- *Children with IFSP*
- *Children with Autism and Asthma*

Adding Family Members

To add a family member to the entered client, click the "Add Family Member" button. A pop-up will appear asking if you want to create a new family member. Clicking "Yes" will bring up a new client where a family member can be added.



All clients added using the "Add Family Member" button will appear in the upper left corner of the client screen.

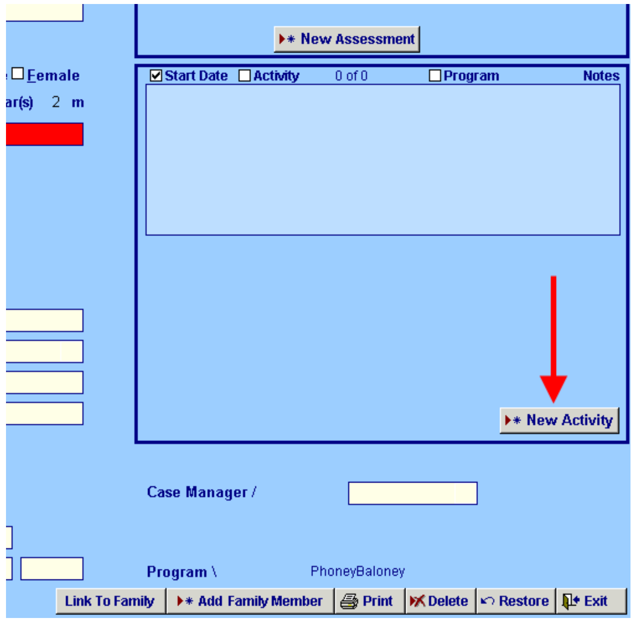


Adding Services

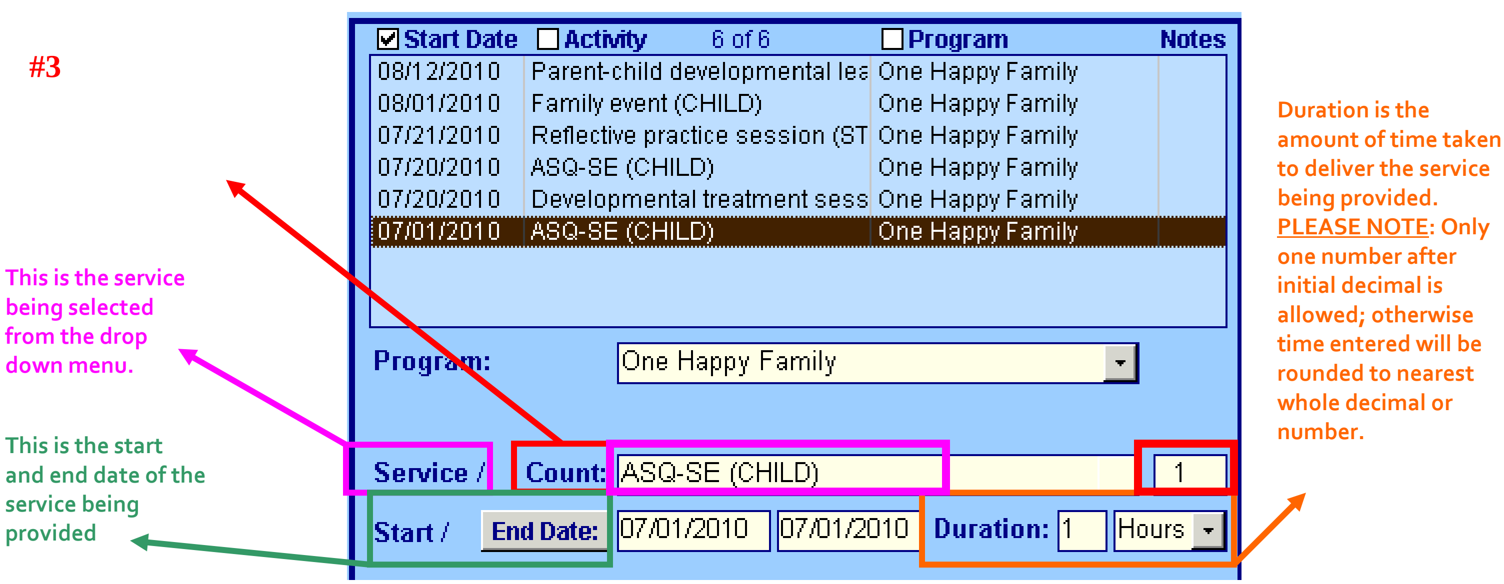
Services can be added to new and pre-existing clients. These services have been set-up and predetermined by the SOW. Services are located to the right of the client demographic information.

Steps:

1. Services are entered by clicking "New Activity."



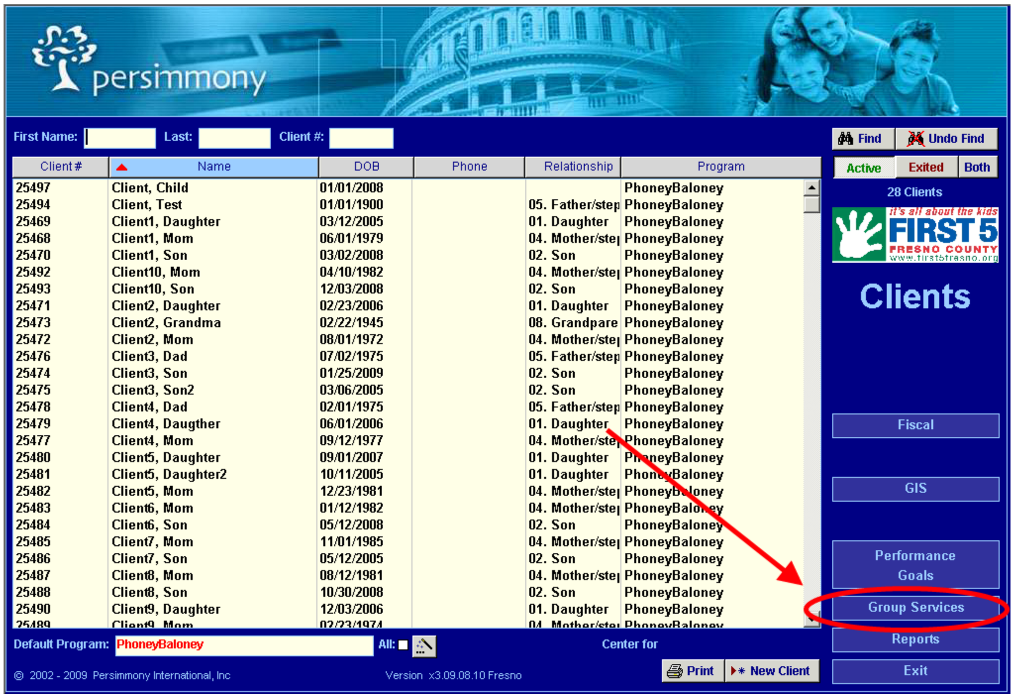
2. Choose the service you would like to add from the drop down menu. If your account has access to multiple programs, you will also need to select the appropriate program that provided the service. Continue filling out the service information. *Please remember that Service Count and Duration change when multiple service counts are combined.*



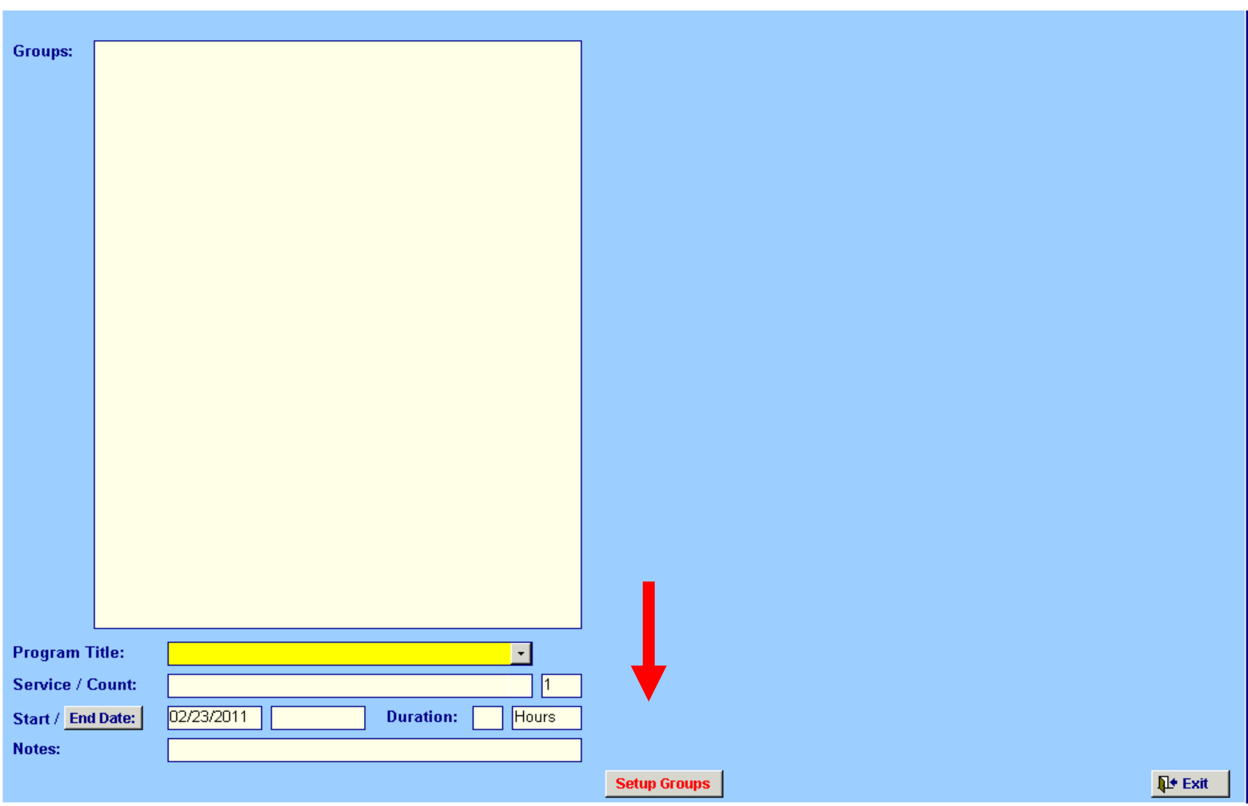
Please note**: Each service name will specify the client that the service should be applied to in Persimmony. For example, if your program provides home visits, the service will read "Home Visit (PARENT)" indicating you should assign the home visit service to the parent.* ***IF service is not found DO NOT substitute with other service, instead contact Program Officer for instructions.

Group Services

The Group Services section can be used to enter services for a group of clients, rather than one at a time. This is especially useful for classes or workshops. Access the Group Services module from the main client window.

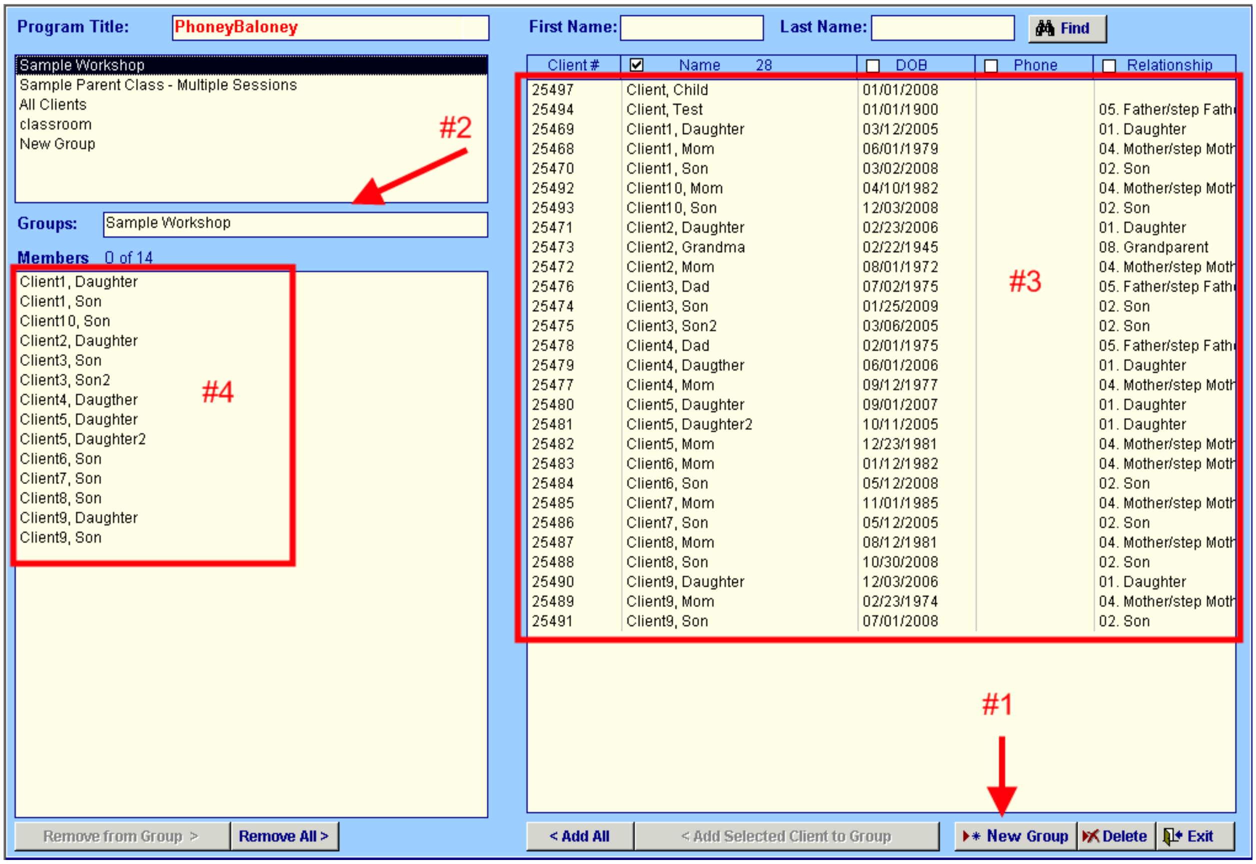


To create a new group, click on ***Setup Group*** in the center of the group services screen.



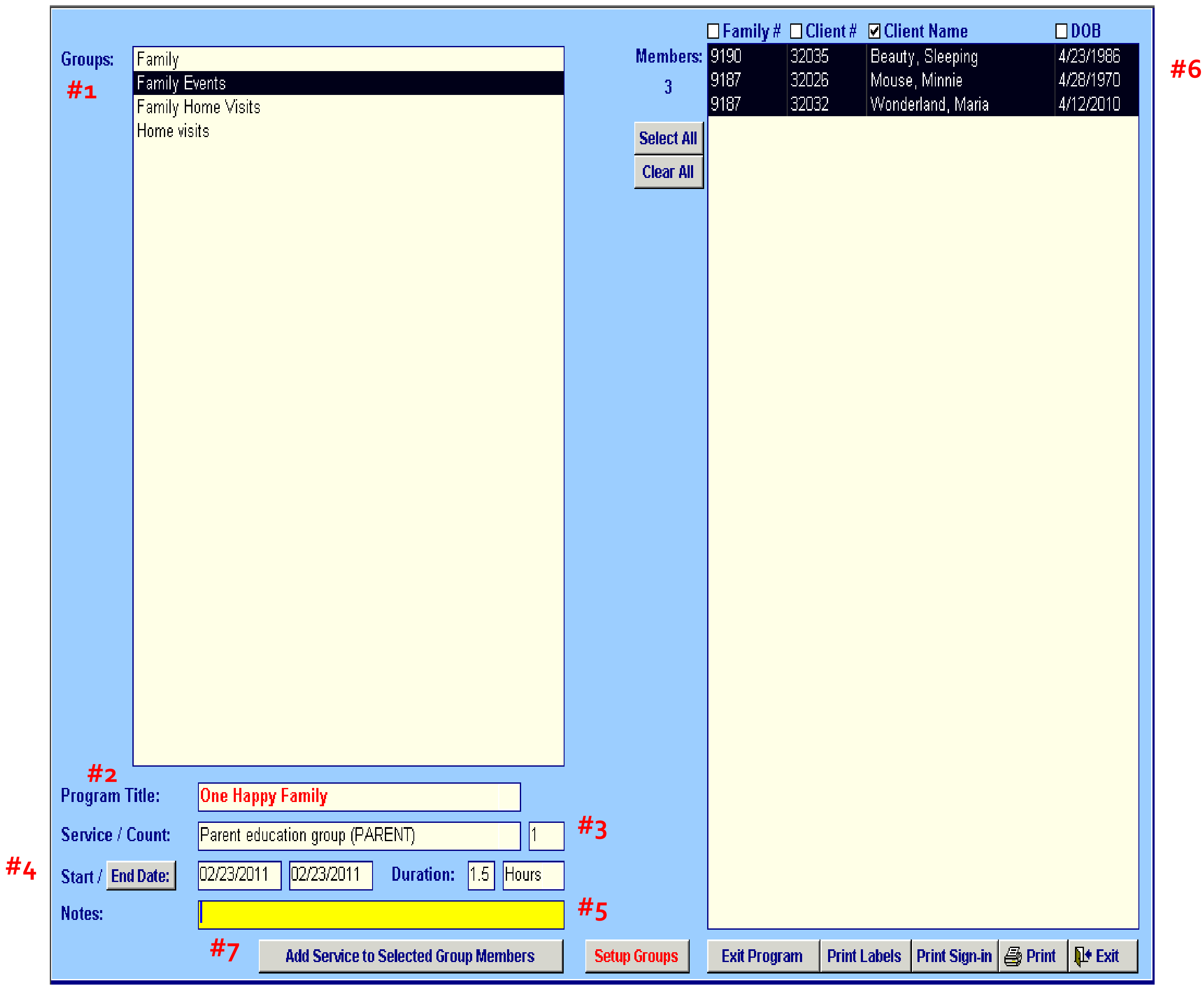
Creating a new group of clients can be accomplished with the following steps:

1. Click *New Group* on the bottom right of the group services page.
2. Enter a name for the group (e.g., Quarter 3 Workshops).
3. Double click on the clients you would like to add to the newly created group.
4. Each client selected will appear in the *Members* window on the left hand side of screen.



When you are finished, click *Exit* to return to the main group services page. You should see the newly created group in the *Groups* frame. You can now add services to as many or as few clients from each group as you need with the following steps:

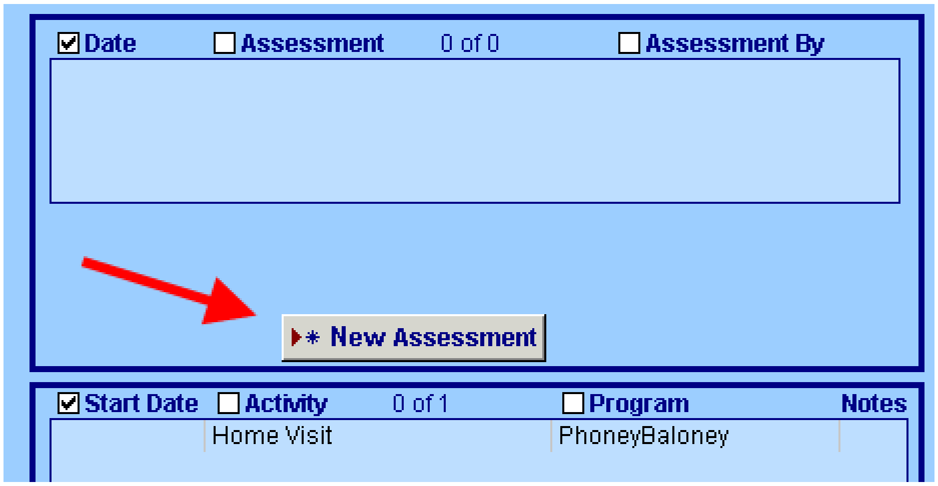
1. Choose the appropriate group.
2. Specify the program title for this service (program title will likely be filled in already, please verify that the program is correct before continuing).
3. Specify the appropriate service and service count.
4. Enter the start date and end date as well as the service duration information.
5. Enter any applicable notes (these notes will be added to each client).
6. Select the clients you would like to apply the service to (clients highlighted in **BLACK** will have the service applied to them).
7. Click *Add Service to Selected Group Members* to add the service to all highlighted clients.



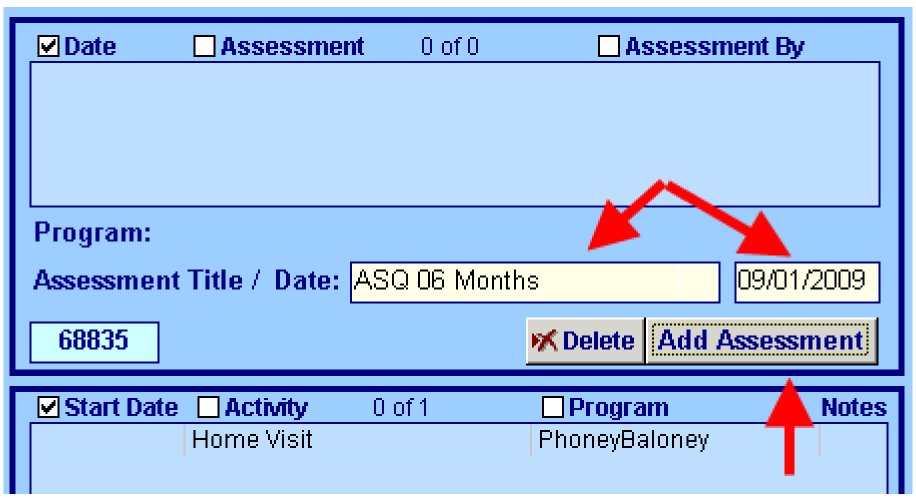
***Please Note**: Once groups have been set up, sign in sheets and labels may be printed from this screen.*

Assessments

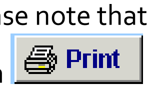
Assessments are added in the top right corner of the client screen by clicking the "New Assessment" button.

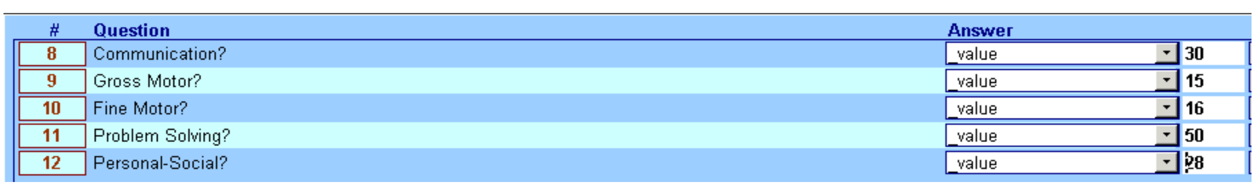


A list containing all assessments active for every program on your user account will appear. Choose the correct assessment from the list, enter the date the <u>assessment was administered</u> **NOT date of data entry**, and click "Add Assessment".



NOTE: If you select assessment and do not ADD ASSESSMENT, it will still show up in the assessment box but it will be an incomplete assessment.

A screen similar to this will appear; answer each question accordingly until you are done filling out the assessment prior to exiting. Please note that questions may be truncated; but the full question can be seen by selecting the printer icon  located in the lower right hand side of the screen. For any modifications double click on the assessment title and make changes as needed.



***Please Note**: When answering questions in assessments take care to notice that the answer allows you to proceed or move forward in a logical sense or meaning. That is the answer for question 1makes sense in question 2 and so forth or vice versa.*

Performance Goals

Also known as a Service Activity, Services, Service Modality or Deliverables are the list of services that have been predetermined by First 5 Fresno County and your Agency as those services that will be captured in Persimmony and assigned to a Core or Aggregate Client.

Performance goals can be viewed and imported by clicking on the "Performance Goals" button from the main client screen.

PLEASE NOTE: *ALWAYS check to make sure the "Default Program:" field is displaying the correct program BEFORE entering any data to avoid data entry errors.*

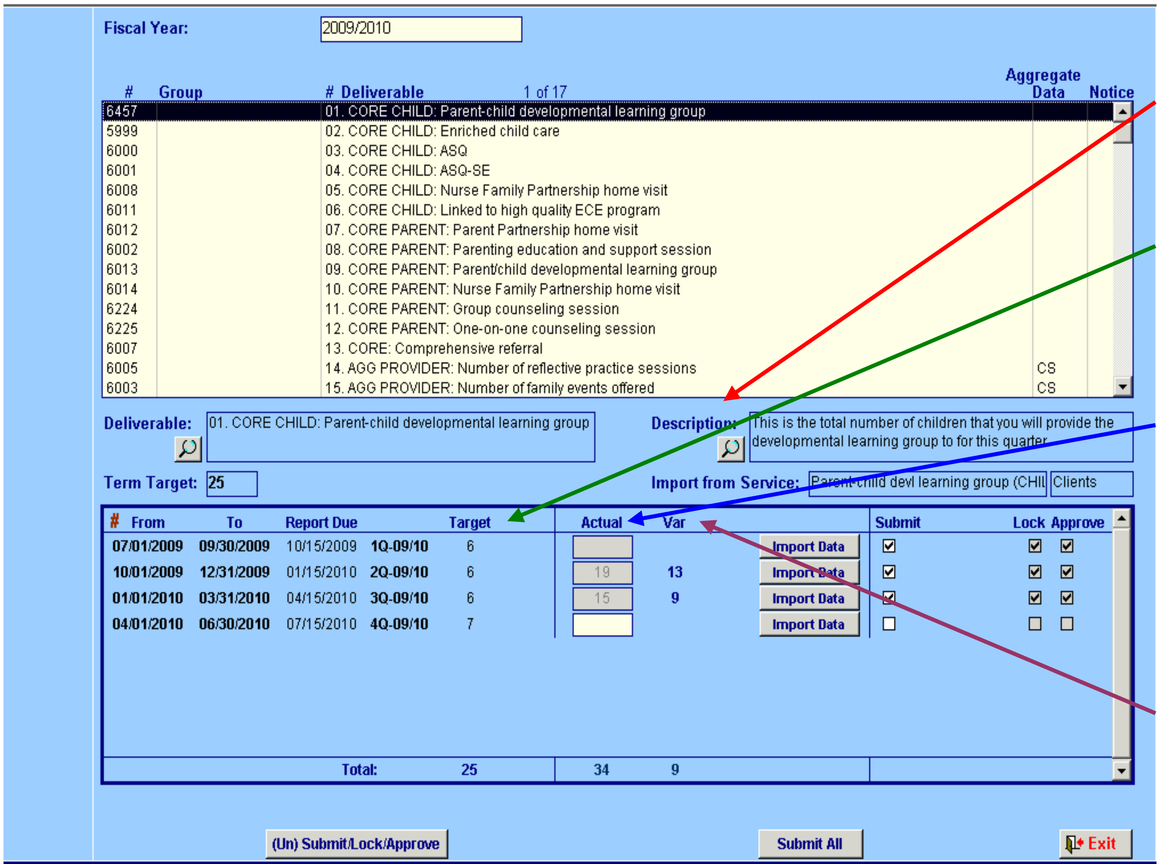
The performance goals screen shows all services you are required to report as defined in your Scope of Work with First 5 Fresno County. The Import Data button allows you to import the services you have added to clients. You may click on this button at any time, but usually should be done after data entry.

The Description field provides additional detail about the measure

The Target field lists the target # if applicable for each quarter

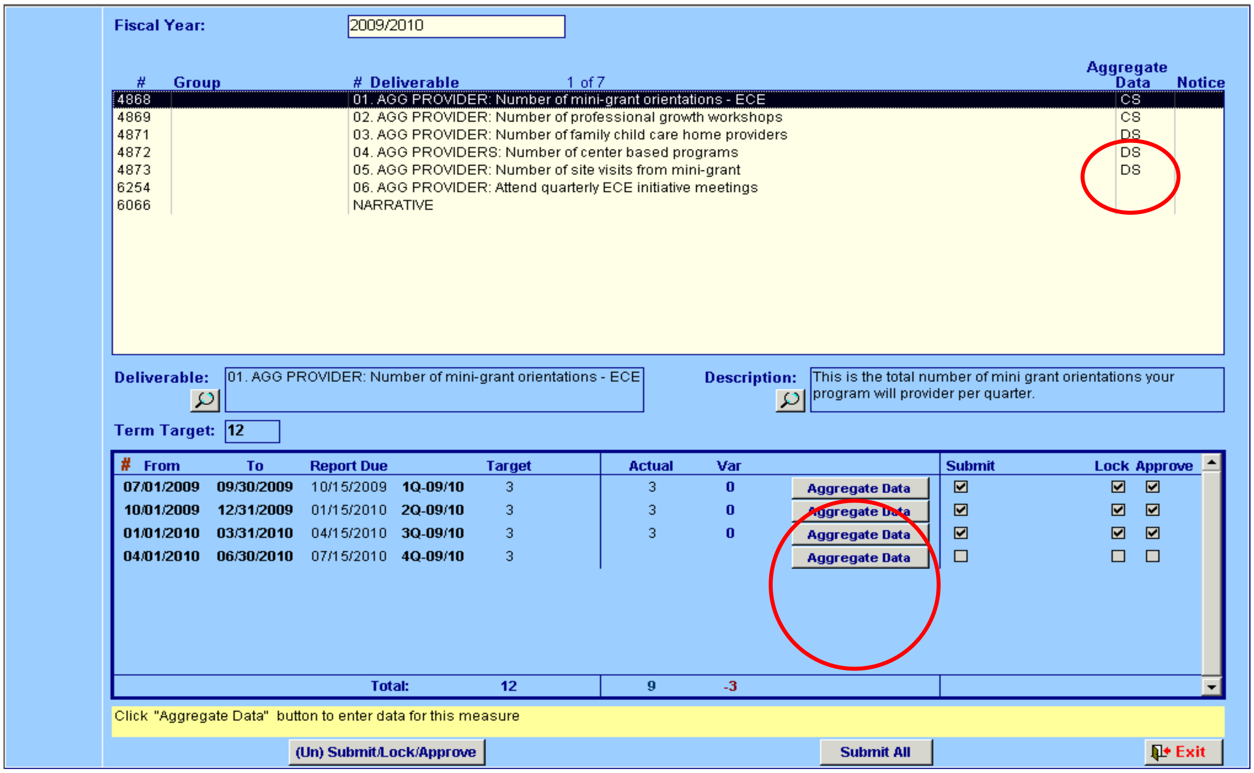
Once you import data, the Actual will automatically populate as a result of services added to core clients; please do not TYPE anything in this box

The Var. field shows the difference between the target and the actual numbers for each quarter


Fiscal Year:
2009/2010
Group
Deliverable
1 of 17
Aggregate Data
Notice
6457 01. CORE CHILD: Parent-child developmental learning group
5999 02. CORE CHILD: Enriched child care
6000 03. CORE CHILD: ASQ
6001 04. CORE CHILD: ASQ-SE
6008 05. CORE CHILD: Nurse Family Partnership home visit
6011 06. CORE CHILD: Linked to high quality ECE program
6012 07. CORE PARENT: Parent Partnership home visit
6002 08. CORE PARENT: Parenting education and support session
6013 09. CORE PARENT: Parent/child developmental learning group
6014 10. CORE PARENT: Nurse Family Partnership home visit
6224 11. CORE PARENT: Group counseling session
6225 12. CORE PARENT: One-on-one counseling session
6007 13. CORE: Comprehensive referral
6005 14. AGG PROVIDER: Number of reflective practice sessions CS
6003 15. AGG PROVIDER: Number of family events offered CS
Deliverable:
01. CORE CHILD: Parent-child developmental learning group
Description:
This is the total number of children that you will provide the developmental learning group to for this quarter.
Term Target:
25
Import from Service:
Parent-child devl learning group (CHIL
Clients
From To Report Due Target Actual Var Submit Lock Approve
07/01/2009 09/30/2009 10/15/2009 1Q-09/10 6 Import Data
10/01/2009 12/31/2009 01/15/2010 2Q-09/10 6 19 13 Import Data
01/01/2010 03/31/2010 04/15/2010 3Q-09/10 6 15 9 Import Data
04/01/2010 06/30/2010 07/15/2010 4Q-09/10 7 Import Data
Total: 25 34 9
(Un) Submit/Lock/Approve
Submit All
Exit

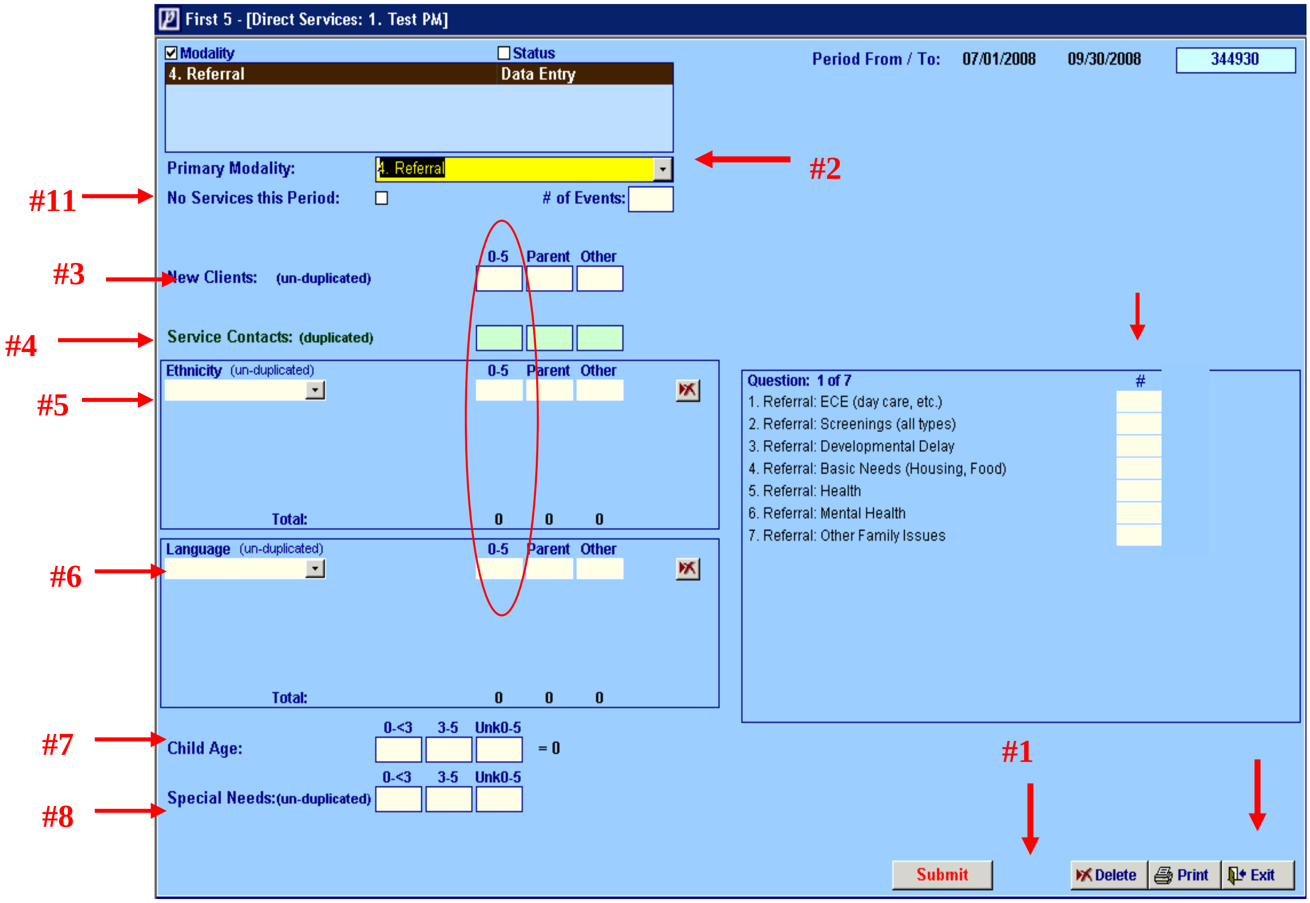
Direct Services vs. Community Strengthening

Some measures require an overall value broken down into demographics such as ethnicity, client age, and language. These measures are denoted by a DS in the Aggregate Data column. DS stands for "direct service" meaning that the numbers are based on direct services that get reported to the state and therefore require demographics. For this type of measure, instead of inputting a total field, you must enter the data in the Aggregate Data sheet. You can access this sheet by clicking on the "Aggregate Data" box for each quarter.



Steps for adding DS Aggregate Performance Measures (image below)

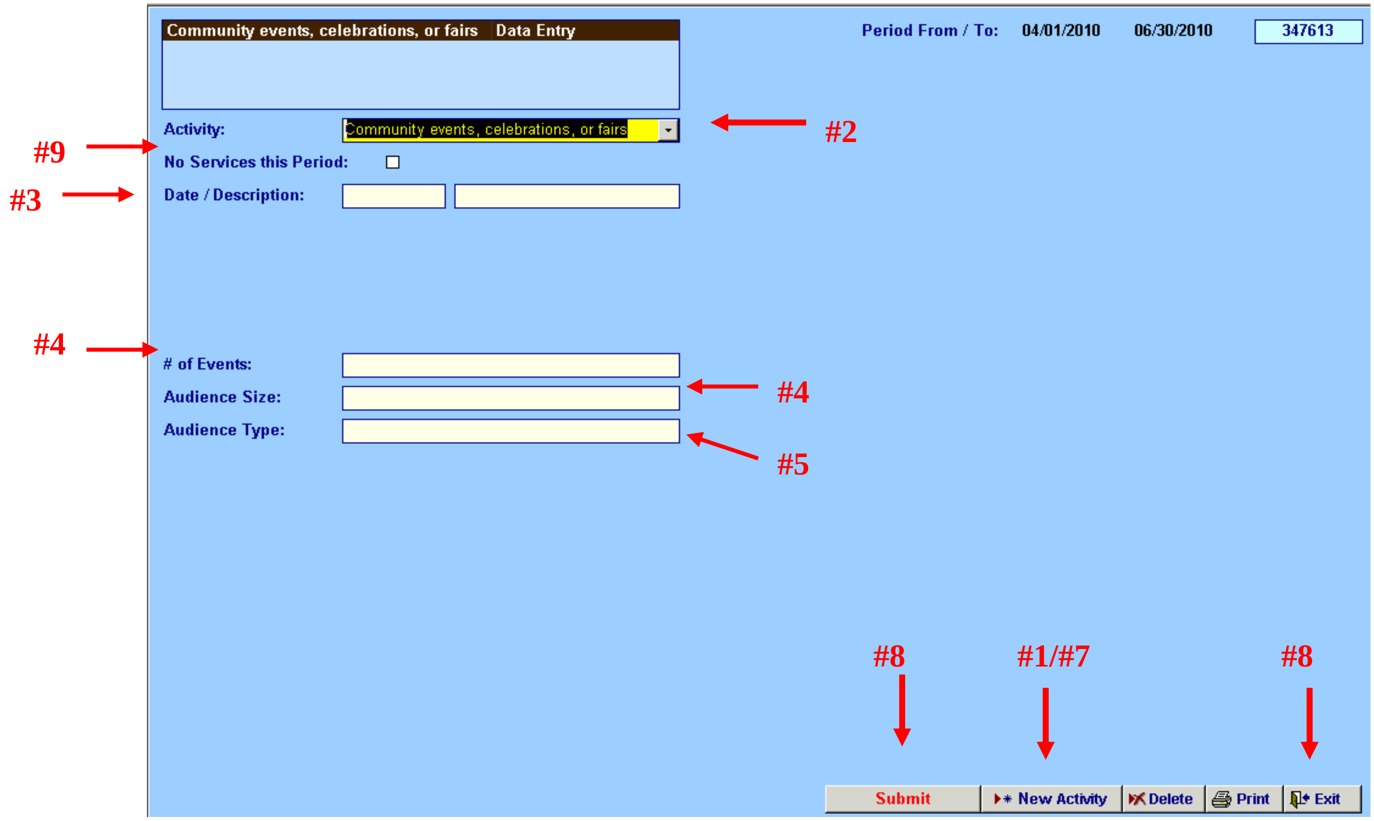
1. Click on the "New" button on the lower right-hand side of the screen (the new button disappears once clicked).
2. In the "Primary Modality" drop-down menu, select the appropriate modality.
3. For "# of events" be sure to enter the amount of times this service was provided or occurred.
4. Enter the total number of new clients or unduplicated clients.
5. Enter the total number of service contacts; this is the total number of participants for this service; **this is the total number of unduplicated and duplicated clients.**
6. Complete the Ethnicity section; choose each ethnicity category from the drop down menu and enter in the number of clients that fit that category; please note this is for **UNDUPLICATED CLIENTS ONLY.**
7. Complete the Language section; choose each language category from the drop down and enter in the number of clients that fit that category; please note this is for **UNDUPLICATED CLIENTS ONLY.**
8. Enter in the age of the child participants; there are three categories to choose from: 0-under 3; 3-5; and unknown.
9. Enter in the number of children with special needs (this will be subset of your total).
10. Some measures have special questions that appear on the right hand side of the screen; enter in the values for each category.
11. If you are finished entering data for this quarter, click on submit button, then click "Exit."
12. If you have "No Services this Period," click on this box, then "Exit."



Some measures only require an overall value broken down into type of activity, date of activity, description (if possible), number of events, audience size and audience type. No demographics such as ethnicity, client age, and language are required. These measures are denoted by a CS in the Aggregate Data column. CS stands for "community strengthening" meaning that the numbers are based on number of events.

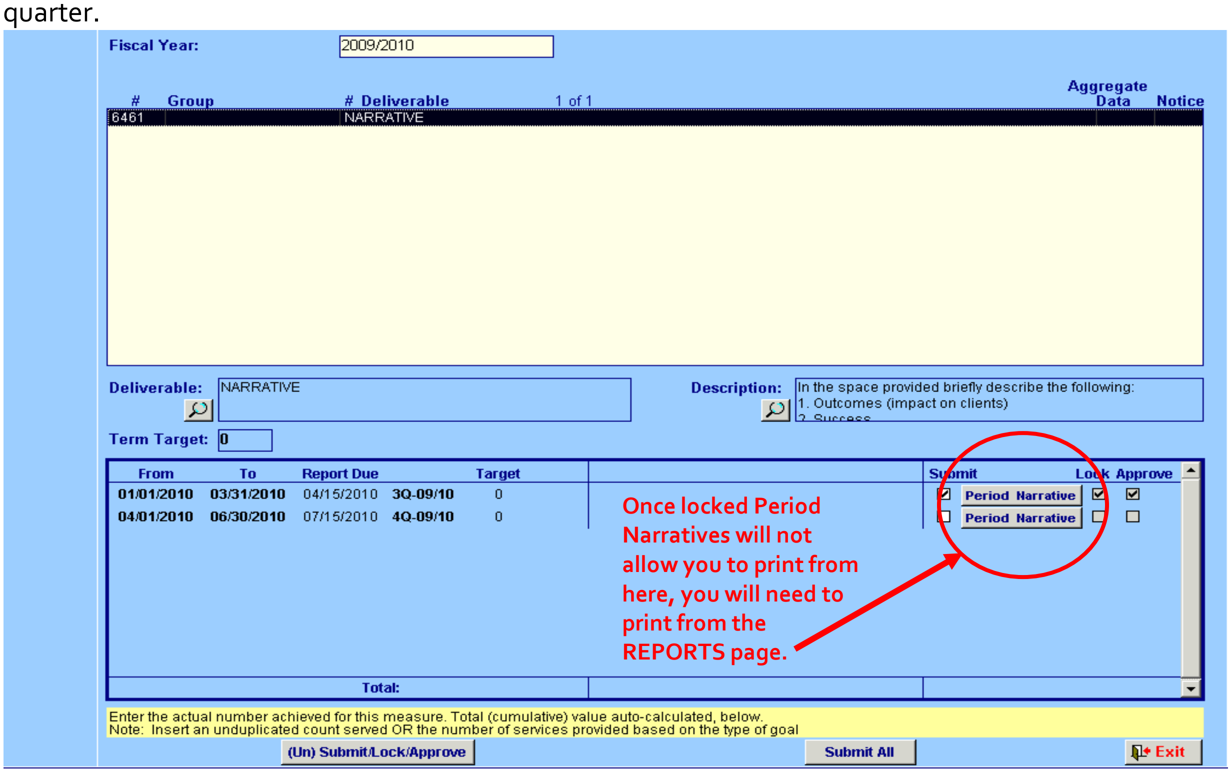
Steps for adding CS Aggregate Performance Measures (image below)

1. Click on the "New Activity" button on the lower right-hand side of the screen (the new button disappears once clicked).
2. In the "Primary Activity" drop-down menu, select the appropriate modality.
3. Enter the date the activity took place along with description.
4. Enter total number of events for that date.
5. Enter the audience size.
6. Enter the audience type.
7. When you are finished entering data for this activity, click "Exit" or if you have a new batch to enter, click "New Activity."
8. If you are finished entering data for this quarter, click on submit button, then click "Exit."
9. If you have "No Service this Period", click on this box, then "Exit."



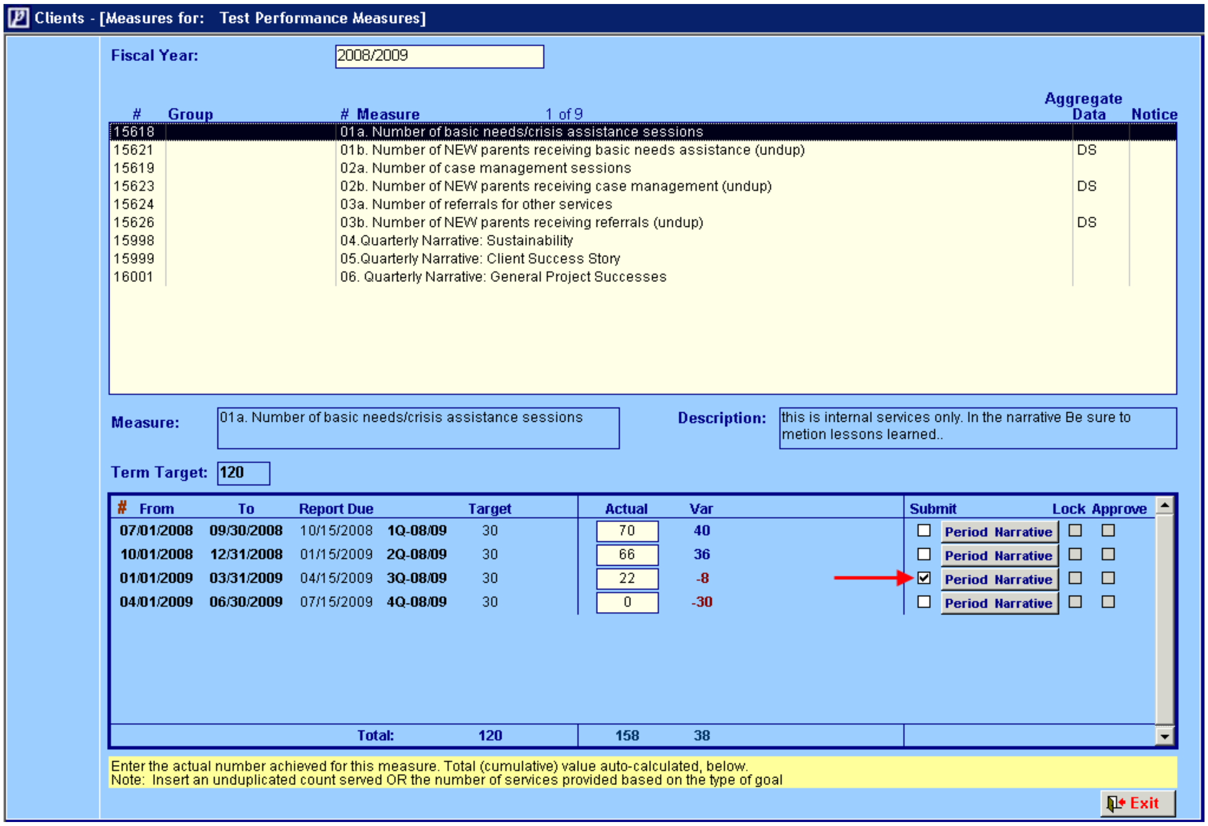
Narrative Fields

All quarterly reports include a narrative portion; please refer to First 5 Fresno County's Quarterly Narrative Report Guidelines in the Service Provider Manual for more details. In addition, the narratives can be used to include any comments, questions, or feedback on core or aggregate data. As shown below, narrative measures do not have boxes to import data. Instead, there is a box titled "Period Narrative" where you can input your narrative. Click on the "Period Narrative" box for the appropriate quarter.

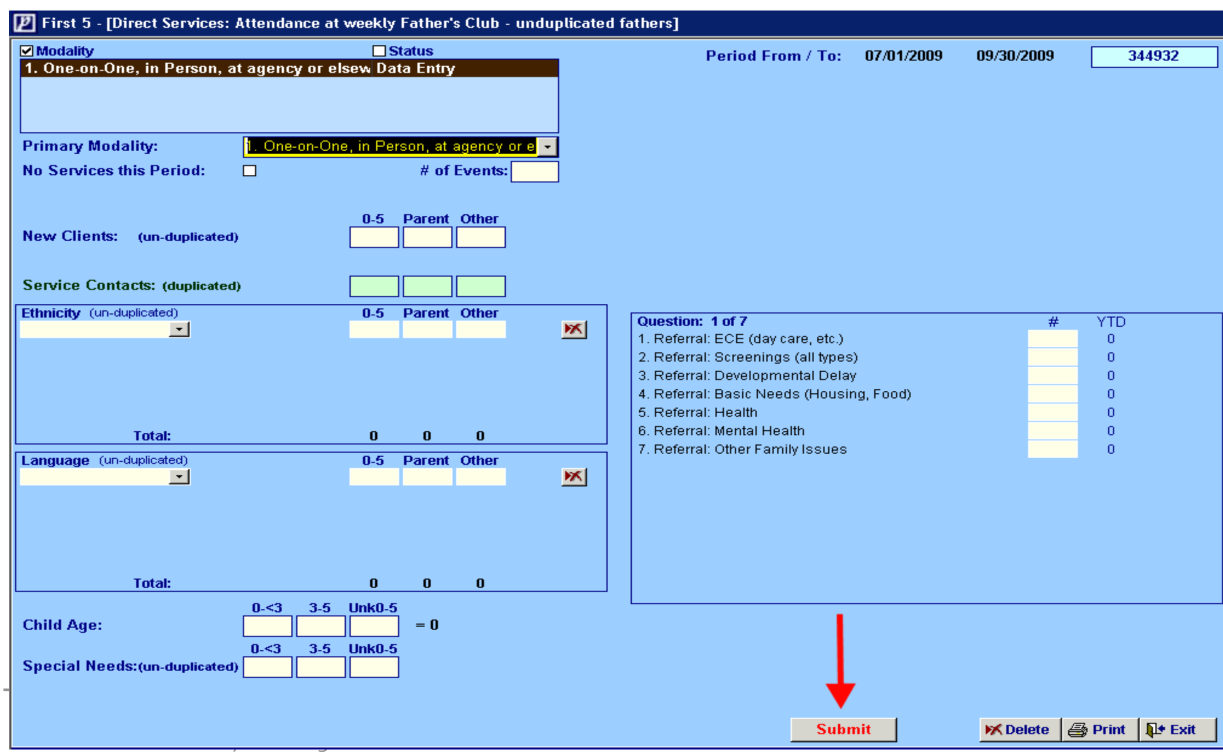


Submitting Data

To notify your First 5 Program Officer that your data are complete for each quarter, you must "Submit" the data for each performance measure. For non-aggregate data measures, check the "Submit" box next to the appropriate data quarter. *Do not panic if you accidently submitted data-you can still make any corrections necessary prior to the quarter deadline.*



For performance measures that require aggregate data, click the "Submit" button on the aggregate data screen.

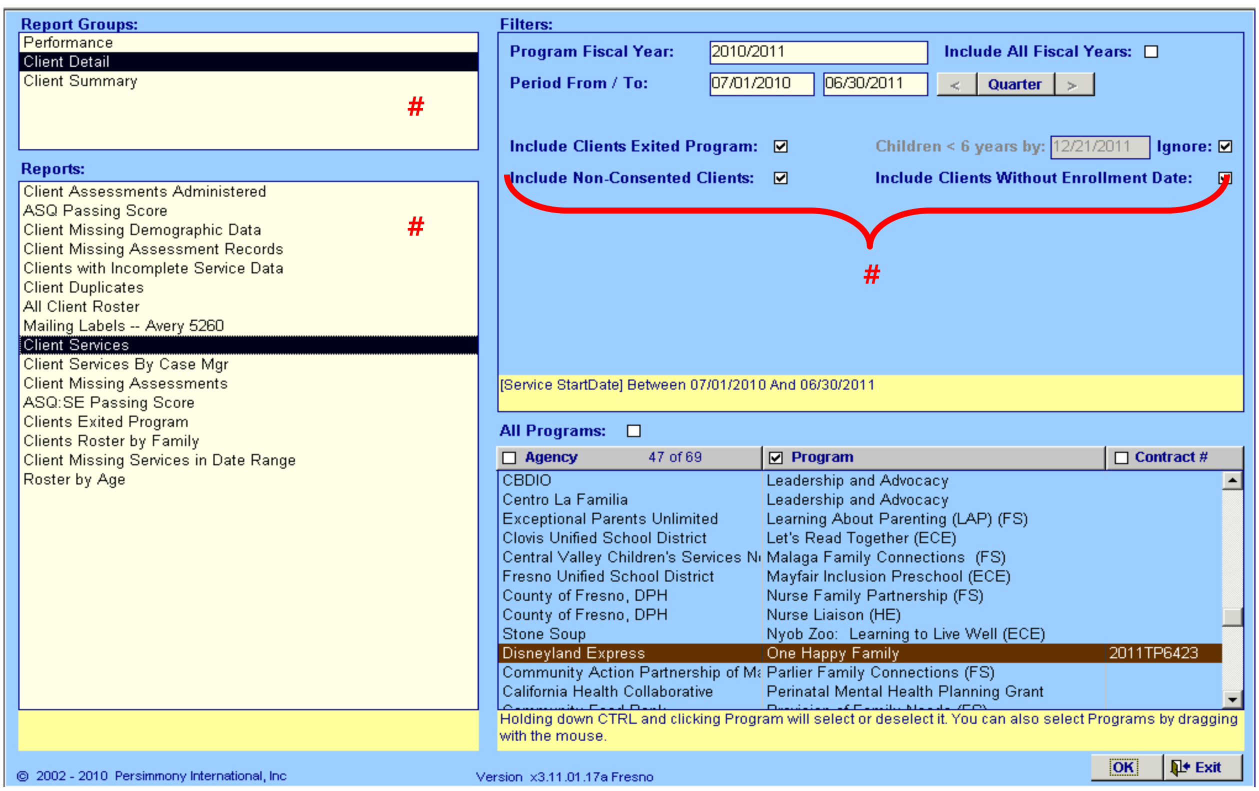


Reports

Running reports allows the data that is being entered to be checked for inconsistencies, data entry errors and provide the user with information about whether goals are being met. Reports are useful because they provide the user with the opportunity to do filters when only certain information is required and allows the user to export for the purposes of sharing findings with other staff members.

To access the report module, click the "Reports" button.

Once you are in the Reports screen, you will only see the programs assigned to your account. You can also see the Reports that you have access to on the left hand side.



There are 3 types of report categories that are accessible:

- *Performance* – Reports related to Performance Measures only.
- *Client Detail* – Client reports **with** detailed and identifiable client level information.
- *Client Summary* – Client reports **without** detailed and identifiable client level information.

The **Reports** frame shows all available reports for the selected group **(#1)** in Persimmony. Select the desired report **(#2)** by clicking the report name before setting additional options in the **Filters** frame **(#3)**. Any options changed in the **Filters** frame will be reset when a new report is selected. Please refer to the appendix for a detailed inventory of the available reports in Persimmony.

Click "OK' to display the selected report.

FIRST 5 FRESNO COUNTY www.first5fresno.org

Client Services

One Happy Family

Clients with Services From: 07/01/2010 To: 06/30/2011

Include Clients Exited Program

Include Non-Consented Clients

Include Clients Without Enrollment Date

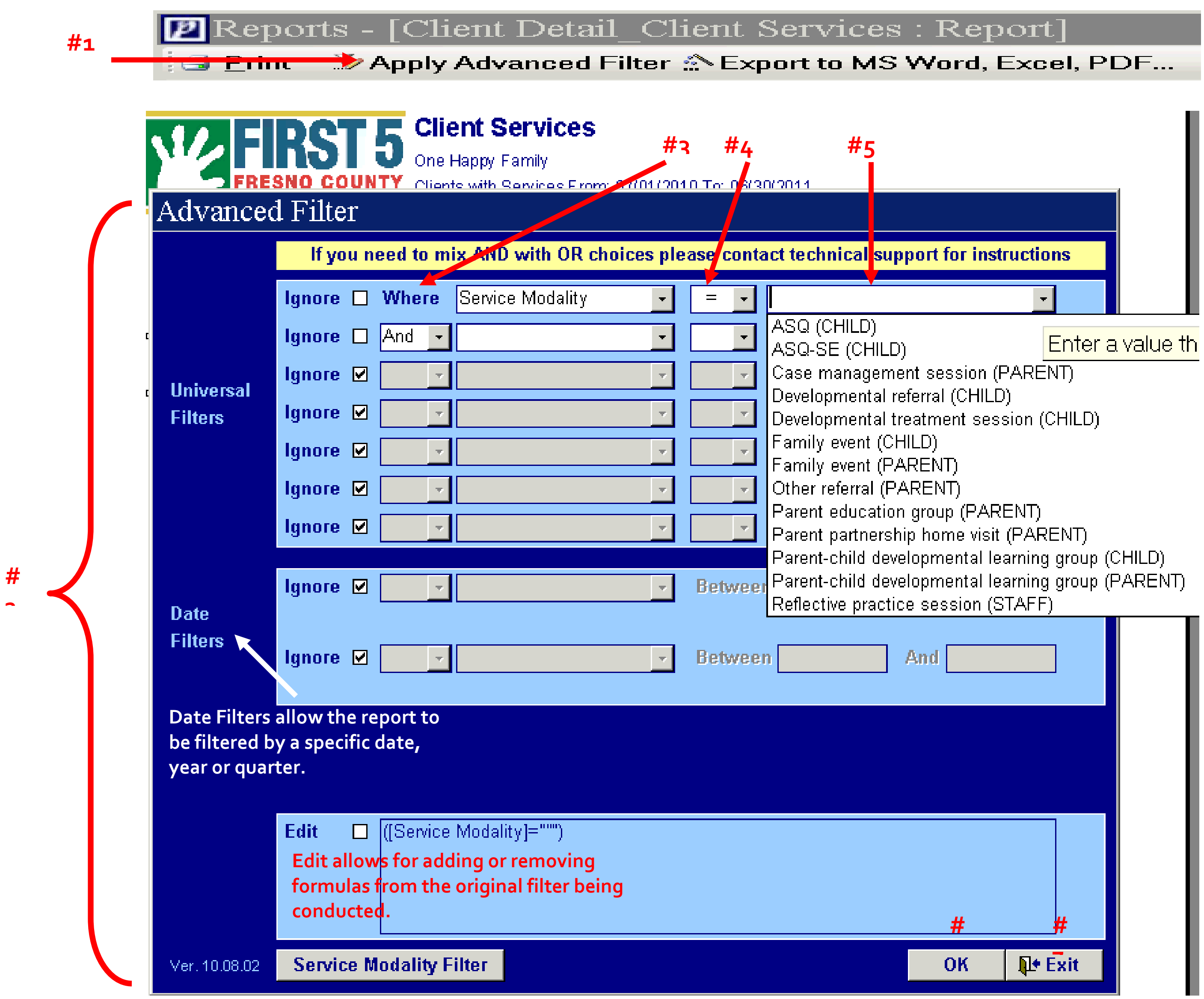
	Client ID	Client Name	DOB / Program Title	Enrollment Date / Service From	Service To	Service Quantity	Service Duration
1	32035	**Beauty, Sleeping**	**04/23/1986**	**07/01/2010**			
		Parent education group (PARENT)	One Happy Family	07/20/2010	07/30/2010	10	30 Hours
		Parent partnership home visit (PARENT)	One Happy Family	07/20/2010	07/30/2010	20	20 Hours
		Other referral (PARENT)	One Happy Family	07/29/2010	07/29/2010	1	2 Hours
		Parent partnership home visit (PARENT)	One Happy Family	08/01/2010	08/01/2010	1	3 Hours
		Parent-child developmental learning group (CHILD)	One Happy Family	08/12/2010	08/12/2010	1	1 Hours
		Case management session (PARENT)	One Happy Family	08/20/2010	08/20/2010	1	125 Hours
		Case management session (PARENT)	One Happy Family	02/22/2011	02/22/2011	1	90 Minutes
					Total:	**35**	
2	32027	**Dog, Pluto**	**08/26/2006**	**07/01/2010**			
		ASQ-SE (CHILD)	One Happy Family	07/01/2010	07/01/2010	1	1 Hours
		ASQ-SE (CHILD)	One Happy Family	07/20/2010	07/20/2010	1	1 Hours
		Developmental treatment session (CHILD)	One Happy Family	07/20/2010	07/20/2010	1	1 Hours
		Reflective practice session (STAFF)	One Happy Family	07/21/2010	07/30/2010	5	5 Hours
		Family event (CHILD)	One Happy Family	08/01/2010	08/20/2010	1	2 Hours
		Parent-child developmental learning group (CHILD)	One Happy Family	08/12/2010	08/12/2010	1	1 Hours
					Total:	**10**	
3	32018	**Mouse, Mickey**	**01/15/1965**	**07/01/2010**			
		Case management session (PARENT)	One Happy Family	07/01/2010	07/01/2010	1	2 Hours
		Other referral (PARENT)	One Happy Family	07/01/2010	07/01/2010	1	10 Minutes
		Case management session (PARENT)	One Happy Family	02/22/2011	02/22/2011	1	90 Minutes
					Total:	**3**	
4	32026	**Mouse, Minnie**	**04/28/1970**	**07/01/2010**			
		Parent education group (PARENT)	One Happy Family	07/01/2010	07/01/2010	0	2 Hours
		Parent-child developmental learning group (PARENT)	One Happy Family	07/01/2010	07/01/2010	0	0 Hours
					Total:	**0**	

Filtering Reports

After a report has been selected and run it may be filtered prior to being exported to the desktop.

Steps for Filtering Reports (image below)

1. Select the Apply Advanced Filter…button located at the top of screen,
2. A pop-up screen will be displayed showing drop down options in 3 separate areas; Universal Filters, Date Filters and Edit box.
3. In the Universal Filter box on the *Where* drop down select the field from the report, or select from the list; several options will come up, select the appropriate one.
4. Then click on the center drop down menu and select a command to use on your filter.
5. Next enter a value that you want the field to be compared to; several options will come up, select the appropriate one.
6. Select the OK button; and allow for a few seconds/minutes depending on size of report for your filter to occur and then display on the page; it is helpful to check the number of pages that you are starting with and then double check once filter is applied to see that it has been effected.
7. Exit the Advanced Filter screen and review report.



Client Services
One Happy Family
Clients with Services From: 07/01/2010 To: 06/30/2011
Include Clients Exited Program

Include Non-Consented Clients

Include Clients Without Enrollment Date
Service Modality="ASQ CHILD"

	Client ID	Client Name	DOB / Program Title	Enrollment Date / Service From	Service To	Service Quantity	Service Duration
1	32032	Wonderland, Maria	04/12/2010	07/20/2010			
ASQ (CHILD)			One Happy Family	07/21/2010	07/21/2010	1	1 Hours
					Total:	1	
					Grand Total:	1	

After the filter has been affected, the finished product will look like the image above. Several filters can be run without CLOSING this report as long as you follow the above steps and the report that was run initially yields the fields necessary.

Exporting Reports

After a report has been selected and run it may be exported to the desktop or any location selected as a Snapshot, Word Document, Excel Workbook, Adobe Acrobat, Enhanced Windows Metafile, or Text File.

Steps for Exporting Reports (image below)

1. Select the Export to MS Word, Excel, PDF,…button located at the top of screen.
2. A pop-up screen will be displayed requesting the level of access you wish to have for the document being exported, be sure to grant yourself full access and then continue.
3. Select the Drive where the exported document will go.
4. If desired the file name can be changed by placing the cursor over the current file name and changing it to appropriate name.
5. Next select the Save as type from the drop down menu.
6. Select the Export button; when done minimize screen and verify that the document is in the destination selected and if done.
7. Exit the Export screen and Close Report.

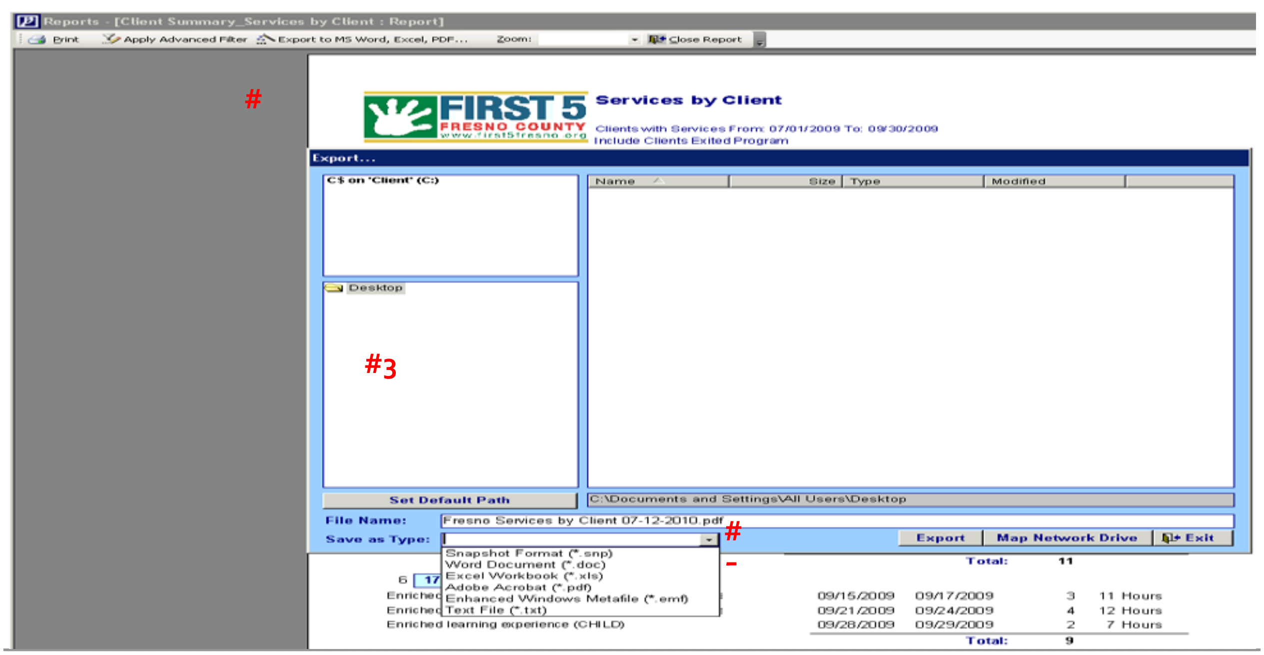
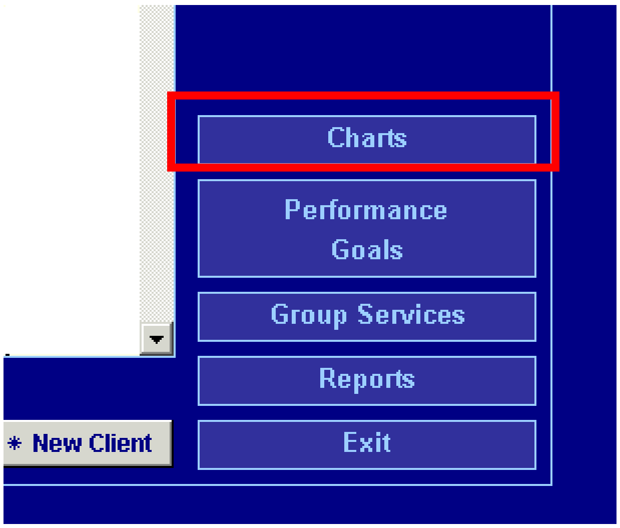


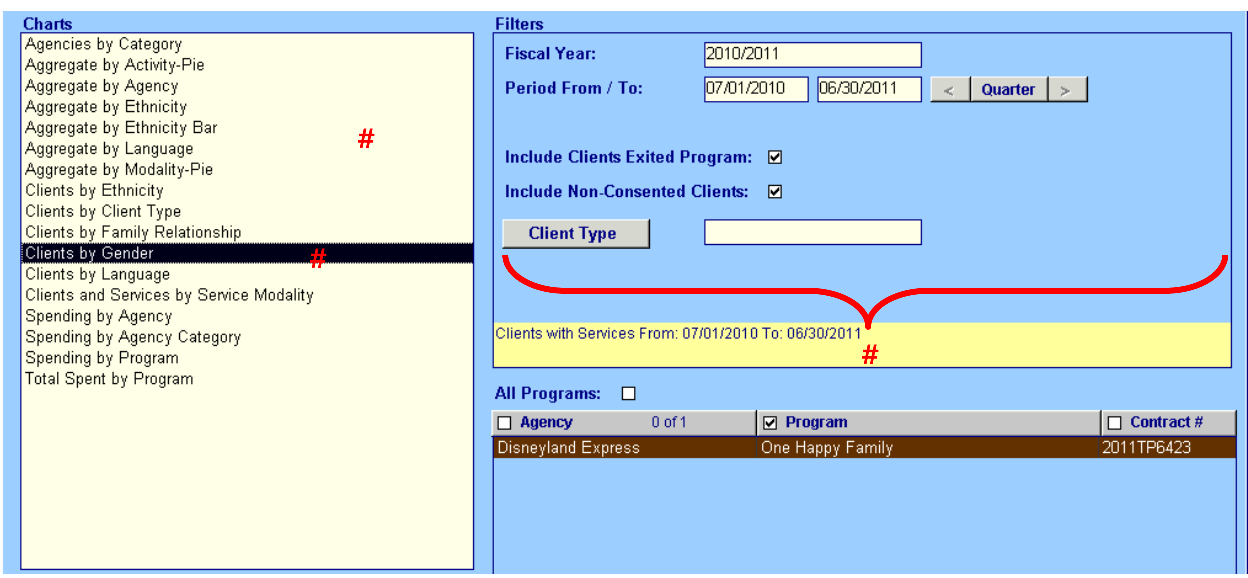
Chart Reports

The data presented in the Chart reports are summarized in pie charts and bar graphs. Chart reports are useful because they summarize key data in a visual and concise way. Chart reports also provide an at-a glance view of data.

To access the chart module, click the "Charts" button.



Once you are in the Charts screen, you will see the programs assigned to your account. You can also see the Chart reports you have access to on the left hand side.

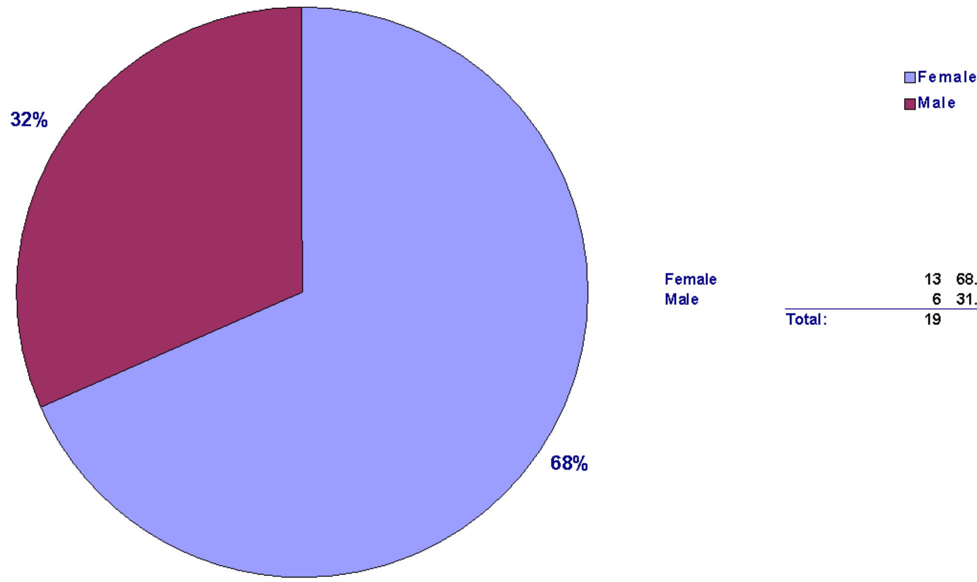


The Charts frame shows all the available Chart reports **(#1)** in Persimmony. Select the desired report by clicking the report name before setting additional options in the **Filters** frame **(#3)**. Any options changed in the **Filters** frame will be reset when a new report is selected.

Click "OK" to display the selected report.

Clients by Gender

One Happy Family
Top 10 values
Clients with Services From: 07/01/2010 To: 06/30/2011
Include Clients Exited Program
Include Non-Consented Clients



Female		13	68.42%
Male		6	31.58%
	Total:	19	

After a Chart report has been generated it may be exported to the desktop or any location selected as a Snapshot or Adobe Acrobat. For steps on how to export reports, please refer to page 29 of this manual.

***Please note**: Chart reports will only pull data from the **TOP TEN** categories of data entry in Persimmony, meaning that only the **TOP TEN** most "entered" or "selected" data will be populated in the charts. It is suggested that all Chart reports are exported to a **Snapshot format** for better quality.*

III. Persimmony Support

**** When contacting Persimmony Support, please be sure to contact the Database Manager first and only unless you are instructed to do otherwise. Please allow for a 24 hour turn around time to be contacted back (excludes Holidays and weekends). The support back-up should only be called when Database Manager is off or when you are instructed to do so. We appreciate your understanding and follow through.**

Persimmony Support

All Persimmony technical support issues are handled by Harder+Company Community Research.

Technical issues include, but are not limited to the following:

- User account creation
- Password resets
- Persimmony application errors
- Persimmony report errors
- "How-to" questions regarding use of the system

Primary Support and Database Manager contact information:

Lesly Soto-Bright, MPA
Harder+Company Community Research
299 Kansas Street
San Francisco, CA 94103
Main Phone: (415) 522.5400
Direct Phone: (415) 230.6423
Fax: (415) 522.5445
Email: fresno@harderco.com and lsoto@harderco.com

Back-up Support contact information:

Alejandra Portillo**
Research Assistant
Harder+Company Community Research
299 Kansas Street
San Francisco, CA 94103
Main Phone: (415) 522.5400
Direct Phone: (415) 230.6412
Fax: (415) 522.5445
Email: aportillo@harderco.com
*****Ms. Portillo is only available as back-up and when Ms. Soto-Bright is out of the office. As a courtesy an e-mail notifying you of her availability will be sent when this is the case.***

Please note: Technical support ***cannot*** *make decisions regarding contract compliance, contract deliverables, or evaluation related topics. Please direct all questions not directly related to the functions and use of Persimmony to First 5 Fresno County or your Harder+Company evaluation lead.*

IV. Appendix

****Utilize the following pages to help you understand the many reports available and what they mean; as well as reports you should be running regularly to help you maintain data that is up to date, free of errors and will make the end of each quarter report less stressful and expeditious for you.**

Appendix A – Data Definitions

Core Client: A client that is actively receiving or has received services and whose demographic data such as name, DOB and address are entered into Persimmony for the purposes of tracking his/her progress in a specific program; exited clients are also considered core clients.

Aggregate Client: A client that is entered into Persimmony as receiving a light touch service whose demographic information is limited to Ethnicity and Language. No personal client information such as name, DOB or address is collected.

New Client: A first time client that has not received services EVER through your agency.

First Name/Middle: Clients' first name and if available but not required middle name.

Last Name: Clients' last name.

DOB/Gender: Clients' date of birth should be entered as a 2 digit month, 2 digit date and 4 digit year. If no DOB a default will appear. Gender; select the appropriate box.

Enrollment Date: This is the first date of service EVER for core clients. This date should not be changed once the client starts receiving services, regardless of whether they are exited and then return. This is not the same as the consent date or date of intake; unless of course the client received a service on that same date.

Consent From/Refused- This is the date the client signed their consent form; a consent form may be signed at any time by the client during the fiscal year. Once the date is entered hitting the Tab key (on keyboard) will automatically populate a date 10 years from the original entered. If the client refuses to sign the consent form, checking the small box will shade out the date field indicating that this was the case. If REFUSED is checked and client signs consent at a later date, remove check mark from box and enter the date consent was signed.

Exited Program: Selecting this box exits a client making him/her inactive. You will need to enter a date and reason for exiting the client. Please note that all clients that have not received services within 3 months must be exited, you will still have access to these clients and can un-exit them at the time they return for services.

Special Needs: From the drop down menu, please select the most appropriate response for the client you are entering and identify if the client is a child with special needs.

First 5 Fresno County will use the First 5 California's definition of special needs for Persimmony tracking purposes. First 5 California defines children with special needs as having one of the following:

- Children with identified disability, health, or mental health conditions requiring early intervention, special education services, or other specialized services and supports; or
- Children without identified conditions, but requiring specialized services, supports, or monitoring.

Client Type: From the drop down menu, please select the TYPE that best describes your client.

Relationship: From the drop down menu, please select the RELATIONSHIP that best describes the client you are entering in Persimmony. Refer to the Logic for Selecting Relationship Matrix for guidance on how to select the most appropriate relationship.

Ethnicity: From the drop down menu, please select the ETHNICITY that best describes your client.

Language: From the drop down menu, please select the LANGUAGE that best describes your client.

Home Phone: Please enter the 10 digit phone number for your client; if no HOME PHONE enter all zeros.

Address: Please enter the street number, street name and apartment number when necessary. If client is homeless, please enter HOMELESS, if client declines, please enter DECLINED.

City/State/Zip: Please enter the city where client resides or "hangs out" if homeless. If DECLINED, enter the city and zip code information of your agency.

Program/Local: When a client has been designated a Program, the Program name will be displayed in the lower right corner of the screen. When a LOCAL box is checked off the Program name is not displayed. **LOCAL** clients are clients that ARE NOT receiving First 5 Fresno County services. They are entered for your agency's benefit only. They are not included in the target number of clients that you are required to meet. You will NOT receive "credit" for these clients. LOCAL clients DO NOT EXIST for First 5 purposes.

Narrative Data: A performance deliverable that allows you to report back outcomes, successes and challenges that are not directly captured in data collection.

Aggregate Data: Services that are collected in aggregate form that include client summary information such as ethnicity and language as well as number of events and number of individuals in attendance. No personal client information such as name, DOB or address is collected.

Submitted Data: When this box is checked, it indicates to the Program Officer that the service(s) for the quarter are complete and ready for review by First 5 Fresno County.

Locked Data: At the end of each quarter all services are locked and imported.

Approved Data: Data are approved once the Program Officer has reviewed the data you have submitted and no changes or modifications are required.

*****Note: All demographic data should be entered to the best of your knowledge. If the information is not provided, please select the best option provided. DO NOT LEAVE ANYTHING BLANK.***

Appendix B – Reports

Report	Description	Who Should Use Report
Performance Reports	**Numbers reflect agency performance with numbers in an aggregate format.**	
Aggregate Services by age and Special Needs:	Aggregate report which indicates the number of participants by age and special needs children served.	Service Providers Program Officers
Aggregate Services by Ethnicity:	Aggregate report which indicates the number of participants served by ethnicity.	Service Providers Program Officers
Aggregate Services by Language:	Aggregate report which indicates the number of participants served by language.	Service Providers Program Officers
Aggregate Services by Modality:	Aggregate report which indicates the number of participants served by modality.	Service Providers Program Officers
All Performance Measures by Achievement:	Aggregate report which shows all the services and indicates whether they have been attributed by a 'yes' or a 'no'. It shows data for all the quarters.	Service Providers Program Officers
Program Deliverables by Quarter:	This report indicates the services and shows the target number as well as the actual and the difference. This report shows both aggregate and core services in a cumulative sum in a landscape style.	Service Providers Program Officers
Program Deliverable Summary:	This report shows the services in full detail, as they were setup, and indicates whether the service is aggregate.	Service Providers Program Officers
Program Deliverables with Narrative:	This report indicates all the services and shows the target number as well as the actual difference. This report shows both aggregate and core services. It also provides the narrative; if one was written.	Service Providers Program Officers
Client Detail Reports	**Numbers reported include individual client information.**	
All Client Roster:	This report shows all clients including their DOB; consent; phone; and address.	Service Providers Program Officers
ASQ Passing Score:	This report shows the score given for the corresponding measure in the ASQ.	Service Providers Program Officers
ASQ-SE Passing Score:	This report shows the score given for the corresponding measure in the ASQ-SE.	Service Providers Program Officers
Client Assessments Administered:	This report indicates all clients and each assessment given; including the date the assessment was administered.	Service Providers Program Officers
Client Assessments Detail:	This report indicates all clients and each assessment given; including the date the assessment was given and the answers.	Service Providers Program Officers
Client Duplicates:	This report shows clients who have been entered more than once in the same agency.	Service Providers Program Officers
Clients Exited Program:	This report shows all exited clients by FY and indicates DOB, exited date as well as the phone and address of the client.	Service Providers Program Officers
Client Missing Assessment	This report shows all clients that were given an	Service Providers

Records:	incomplete assessment.	Program Officers
Client Missing Assessments:	This report shows all clients that have not been given an assessment. An Assessment Group needs to be selected.	Service Providers Program Officers
Client Missing Demographic Data:	This report shows all clients and whether or not the data fields for date of birth, enrollment date, ethnicity and language, as well as consent date 'from' and 'to' are missing data.	Service Providers Program Officers
Client Missing Services in Date Range:	This report shows all clients that have not been assigned a service during the selected time period or date range.	Service Providers Program Officers
Clients Roster by Family:	This report shows all clients that have been linked to a family member through a Family ID number. This ID number is different from the Client ID number.	Service Providers Program Officers
Client Services By Case Manager:	This report shows all clients who have received services and the corresponding case manager assuming the case managers name was added.	Service Providers Program Officers
Clients Services:	This report shows all clients who have received a service within the chosen date range. The type of service, the 'from' and 'to' dates and the quantity will be indicated on this report.	Service Providers Program Officers
Clients with Incomplete Service Data:	This report shows all clients who have been given a service but the service fields (date from/to; service, count; duration) are missing or incomplete.	Service Providers Program Officers
Mailing Labels—Avery 5260:	This report creates labels with clients mailing address.	Service Providers Program Officers
Roster by Age:	This report shows all clients and their corresponding age based on the date the report is run.	Service Providers Program Officers
Client Summary:	**Summary reports only indicate client ID number; (sometimes DOB) no other identifiers are on this report.**	
All Client Demographics:	This report shows a summary of all clients served, it breaks down by ethnicity, language, age group, relationship, gender and zip code.	Service Providers Program Officers
All Client Roster	This report shows all clients including their DOB; and consent.	
Assessment Answer Distribution:	This report is a summarization of the answers to all of the assessment questions. Each question and answer is indicated. Answers are broken down by count and percentage. It does not sort the questions/answers by specific assessment. This requires utilizing the filter function in reports.	Service Providers Program Officers
Client Assessments and Services:	This report shows the services and assessments clients have been attributed including the date and service quantity.	Service Providers Program Officers
Client Duplicates:	This report shows clients who have been entered more than once in the same agency.	Service Providers Program Officers

Client Missing Demographic Data:	This report shows all clients and whether or not the data fields for date of birth, enrollment date, ethnicity and language, as well as consent date 'from' and 'to' are missing data.	Service Providers Program Officers
Client Missing Services:	This report indicates all clients that have not been attributed a service.	Service Providers Program Officers
Clients Services:	This report shows all clients who have received a service within the chosen date range. The type of service, the 'from' and 'to' dates and the quantity will be indicated on this report.	Service Providers Program Officers
Consent, Service, and Exit Totals:	This report shows the total numbers of clients enrolled in the program, received services or who have been exited.	Service Providers Program Officers
Core and Aggregate Clients Served:	This report indicates the FY total of clients who enrolled, received a service, exited from the program, were core 0-5 clients, core other clients, aggregate 0-5 clients, aggregate parents, aggregate other, and the number of completed services.	Service Providers Program Officers
Demographics by Specific Field:	This report allows the user to run individual reports on Age, Client Gender, Ethnicity, Language, Relationship and Zip.	Service Providers Program Officers
Non Fresno County Clients:	This report shows how many clients you have that have an address that is outside of Fresno County.	Service Providers Program Officers
Service Clients Target:	This report shows the services you are providing including the Target for the FY, number of unduplicated clients served, number of service records and total service count.	Service Providers Program Officers
Summary of Assessments Administered:	This report shows a breakdown of which assessments were provided, when (by month) and how many. The completion quantities are broken down by month and percentages.	Service Providers Program Officers
Unduplicated Clients by Service:	This report shows the total number of unduplicated clients who were attributed services provided by your program.	Service Providers Program Officers

Appendix C – Reports

Ongoing Reports to Run "*Cheat Sheet*"

Report	Description	Who Should Use Report
Performance Reports	**Numbers reflect agency performance with numbers in an aggregate format.**	
Program Deliverables by Quarter:	This report indicates the services and shows the target number as well as the actual and the difference. This report shows both aggregate and core services in a cumulative sum in a landscape style.	Service Providers Program Officers
Program Deliverables with Narrative:	This report indicates all the services and shows the target number as well as the actual difference. This report shows both aggregate and core services. It also provides the narrative; if one was written.	Service Providers Program Officers
Client Detail Reports	**Numbers reported include individual client information.**	
Client Duplicates:	This report shows clients who have been entered more than once in the same agency.	Service Providers Program Officers
Client Missing Assessment Records:	This report shows all clients that were given an incomplete assessment.	Service Providers Program Officers
Client Missing Assessments:	This report shows all clients that have not been given an assessment. An Assessment Group needs to be selected.	Service Providers Program Officers
Client Missing Demographic Data:	This report shows all clients and whether or not the data fields for date of birth, enrollment date, ethnicity and language, as well as consent date 'from' and 'to' are missing data.	Service Providers Program Officers
Client Missing Services in Date Range:	This report shows all clients that have not been assigned a service during the selected time period or date range.	Service Providers Program Officers
Clients with Incomplete Service Data:	This report shows all clients who have been given a service but the service fields (date from/to; service, count; duration) are missing or incomplete.	Service Providers Program Officers
Roster by Age:	This report shows all clients and their corresponding age based on the date the report is run.	Service Providers Program Officers
Client Summary:	**Summary reports only indicate client ID number; no other identifiers are on this report.**	
Non Fresno County Clients:	This report shows how many clients you have that have an address that is outside of Fresno County.	Service Providers Program Officers