North Carolina Department of
Juvenile Justice and Delinquency Prevention

JCPC Client Tracking User's Guide

Intervention/Prevention Division

INTRODUCTION

In 1980, the community-based programs across North Carolina receiving State funds through the Division of Youth Services began collecting data on juveniles served by those programs. The source document for collecting that data has been, and still is, the Client Tracking Form. In the early days of collecting this data, paper forms were sent to the Central Office in Raleigh where the data was entered by an outside firm. The data was maintained on a mainframe system by the Department of Human Resources. In 1996 the programs began using an Access program which local programs could maintain on computers locally, enter data on their machines, and send diskettes to the Central Office. As the juvenile justice system itself has changed over the years, so has the way in which data on these programs has been collected. The year 2003 began another stage in the improvement of the collection of community program information. Beginning that year, the Department of Juvenile Justice and Delinquency Prevention revised the system to incorporate new legislative requirements and to improve the accuracy of the data being collected on programs throughout the State. It is the intent of the Department to improve the effectiveness of decision-making on the local level and at the State level through improved data collection. Version 3.0 was released to further this goal.

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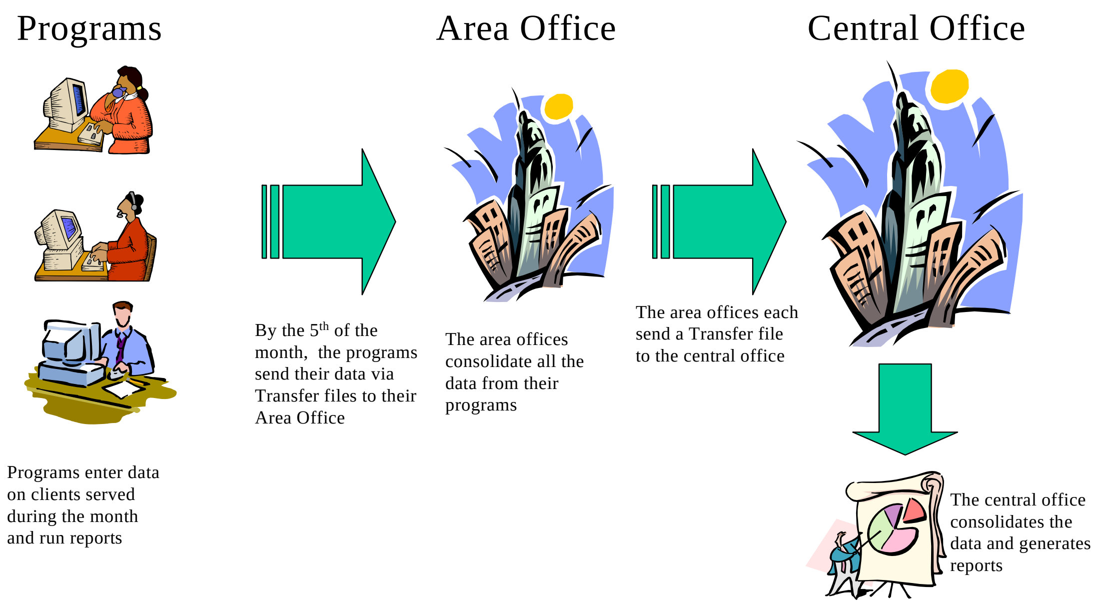
Information Flow

The purpose of this section is to explain the general flow of client data from a DJJDP-funded program to the Department's Central Office. The pictures below provide an overview.



- The process starts with the DJJDP-funded programs in all 100 counties throughout North Carolina. After these programs enter their client data into the CTF program, they are able to run reports. Once a month, the programs create a ***Transfer*** file. This is a file that contains all of the modified data from their clients entered during that month. The program then sends this file to the appropriate area office by the 5^{th} of the month either by email or diskette.

- Each area office consolidates all the data from its programs, allowing the area office to run reports on the data from that area. Area offices then send their ***Transfer*** files of consolidated data to the central office.

- **The central office consolidates the data from the four area offices. This allows the central office to run a number of reports for management and the legislature on DJJDP-funded programs throughout the State.**

GENERAL INFORMATION

This guide will provide instructions on entering and maintaining data on individual clients and programs; transferring files from one location to another; and running reports on data about juveniles who have been served. All these capabilities are features of the Client Tracking Form (CTF) system. It will walk you through each of the options of the menu bar at the top of the screen, guiding you via a combination of pictures and descriptions. Below is the menu bar found at the top of the screen:

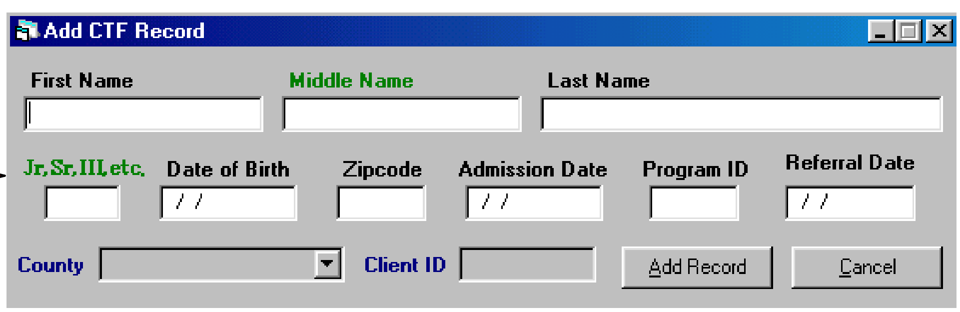
Menu Bar

The <u>Menu Bar</u> provides these options:

- **File** – lets you copy information
- **Program** – lets you view program information
- **CTF Data** – lets you add, change, delete, undelete and search records. It also allows you to browse and export records marked for transfer.
- **Transfer Data** – lets you import transfer records
- **Reports** – lets you produce pre-defined reports or ad hoc client lists
- **Utilities** – lets you import or export a selected program's records
- **Help** – displays the version of CTF you are using.

Screen Notes

Sometimes you will see field captions in **green** (as in the form below). When captions are in green, it means that this information is optional. When captions are in **black**, they are required data elements. **Blue** captions indicate that this data cannot be updated by the user on this screen.

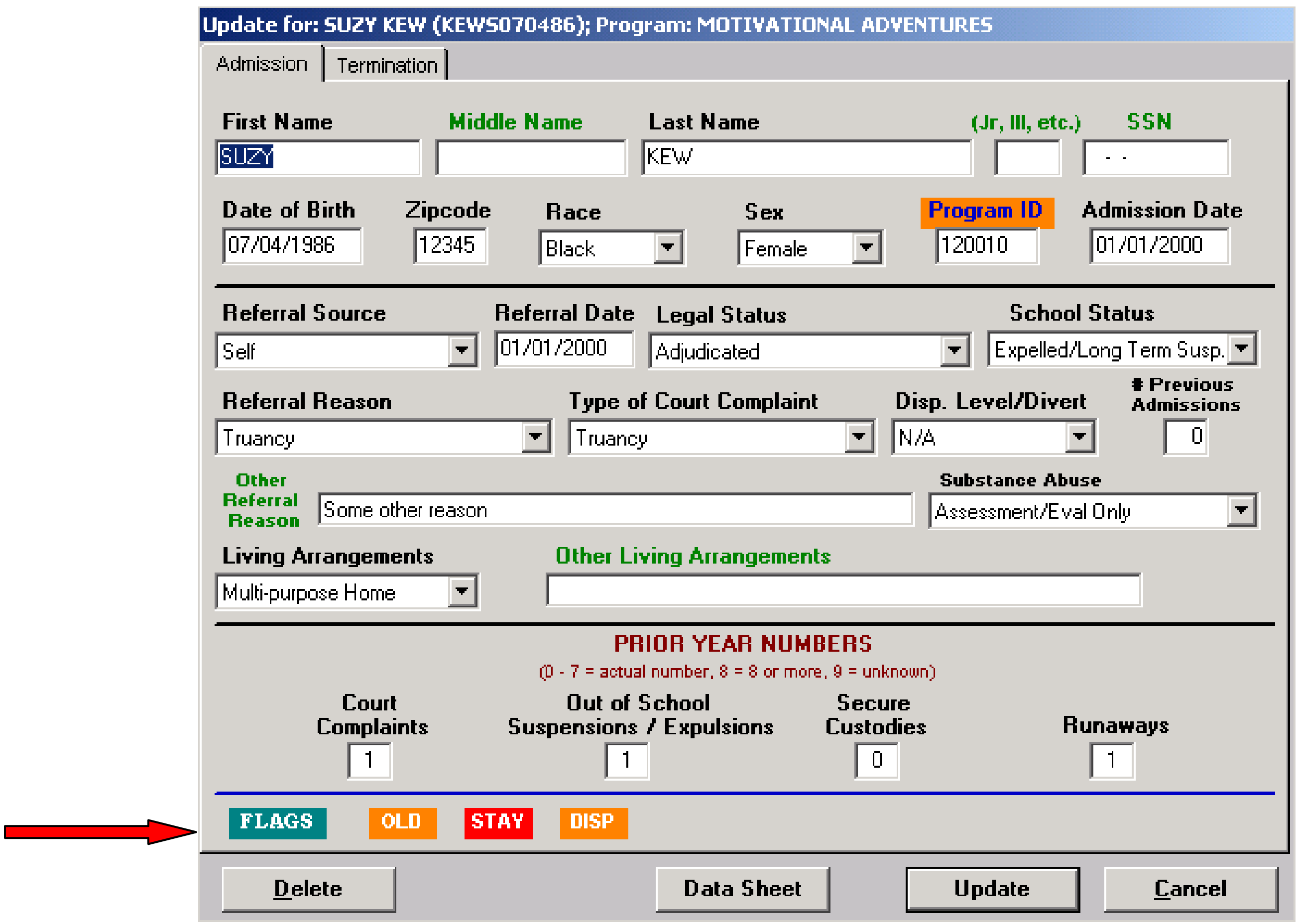


On the Admissions Screen, you will see the "**FLAGS**" caption. This line at the bottom provides you with important warning messages about the information. There are three types of flags:

- **OLD –** Meaning the Juvenile is over 18
- **STAY –** Meaning the length of stay seems long for the program
- **DISP –** Disposition. This is generated when **Legal Status** = **Adjudicated** and **Disp Level / Divert**. = **N/A**. This normally should only be the case with some older records.

In addition, the flags can be **Red** or **Orange**. Red indicates the data is more questionable than if the flag is orange. These flags will not prevent you from saving the record.

For purposes of illustration, the information shown below was entered to show the warning flags "OLD", "STAY", and "DISP" *at the bottom of the screen*. Positioning the mouse pointer over a flag will give you an explanation about the warning.

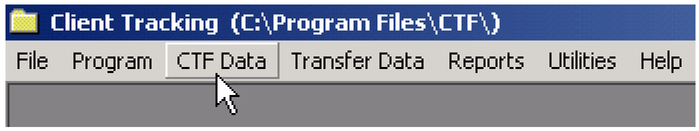


Also note that the Program ID is flagged in orange. This means the Program ID is inactive. You can still enter data for this program, but the flag will alert you to the program's inactive status.

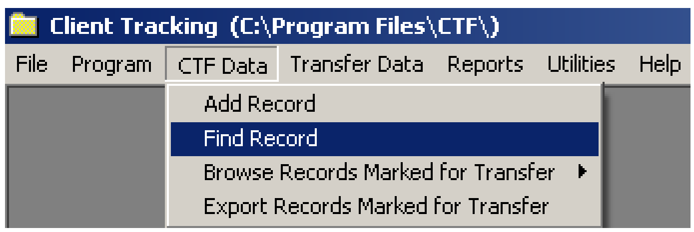
FINDING A JUVENILE

In order to search for a juvenile, follow the steps listed below.

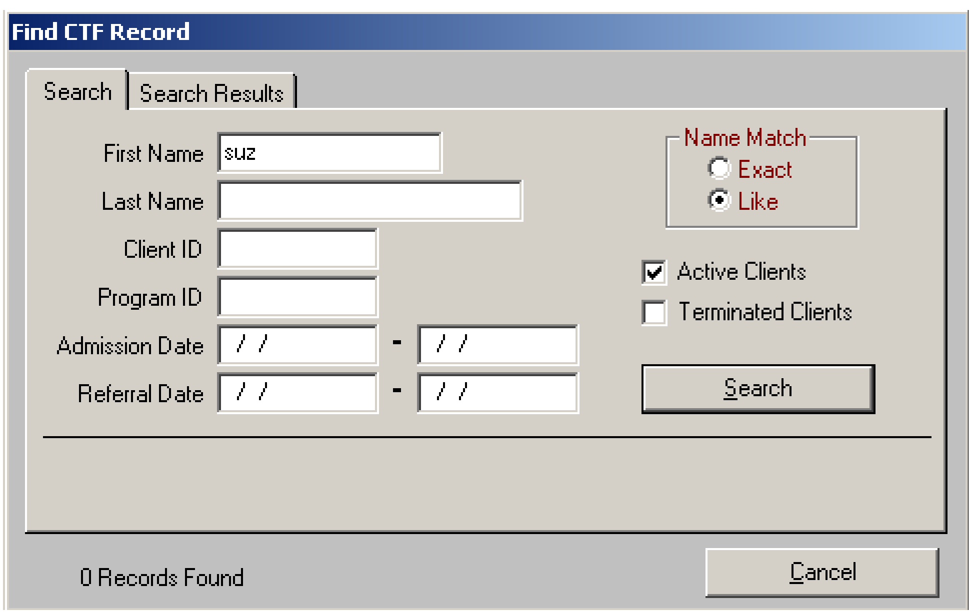
STEP 1: Click on the CTF Data menu option from the main menu bar.



STEP 2: Select the "Find Record" option to search for a juvenile.

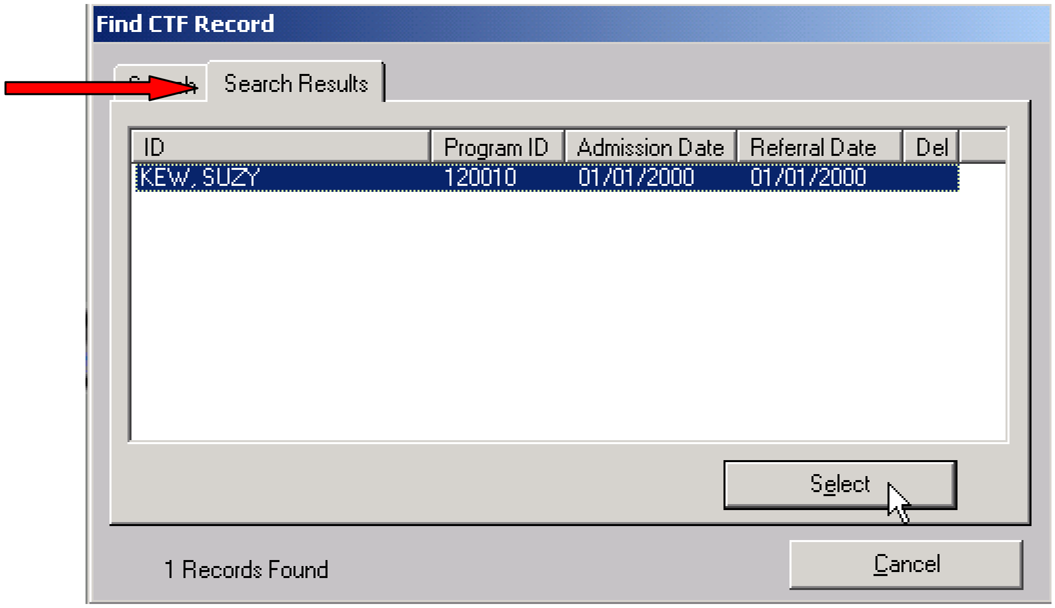


STEP 3: Enter the name (and/or other information) of the juvenile for whom you are searching on the "Find CTF Record" form and click on the *Search* button.

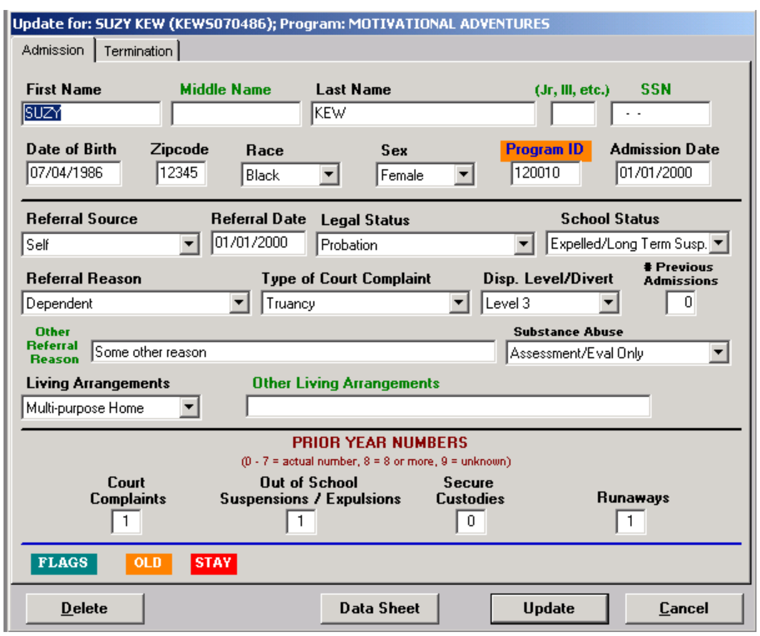


In the "Name Match" choice box, "Exact" matches names as entered; "Like" matches names that start with the same letters. Check the "Inactive Clients" checkbox to include terminated clients.

STEP 4: The matching clients that have been found will appear in the Search Results tab.

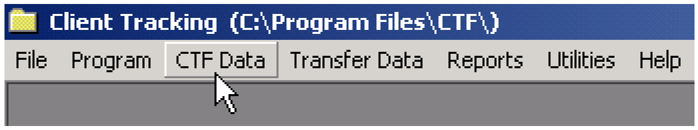


STEP 5: Choose the desired juvenile that you are searching for from the list, highlight the name, and click the *Select* button (or just double-click the selection). In the above example, Suzy Kew is highlighted. Clicking the *Select* button for Suzy Kew will provide the detailed information listed below:

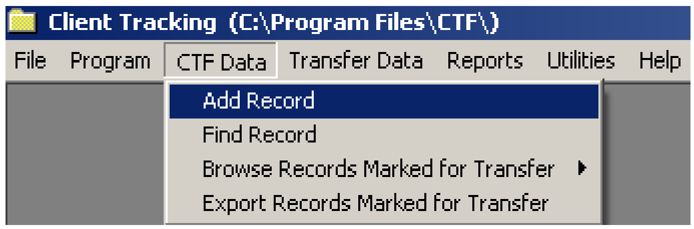


ADDING RECORDS

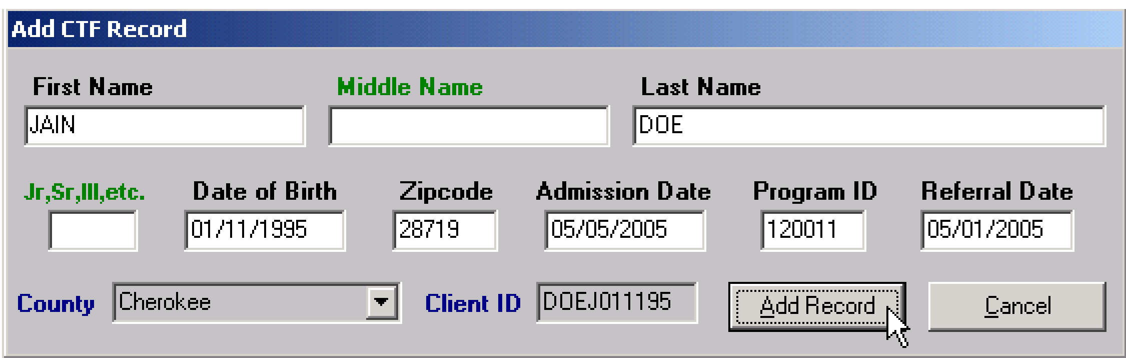
STEP 1: Click on the CTF Data menu option from the main menu bar.



STEP 2: Select "Add Record" to enter a new record into the system.

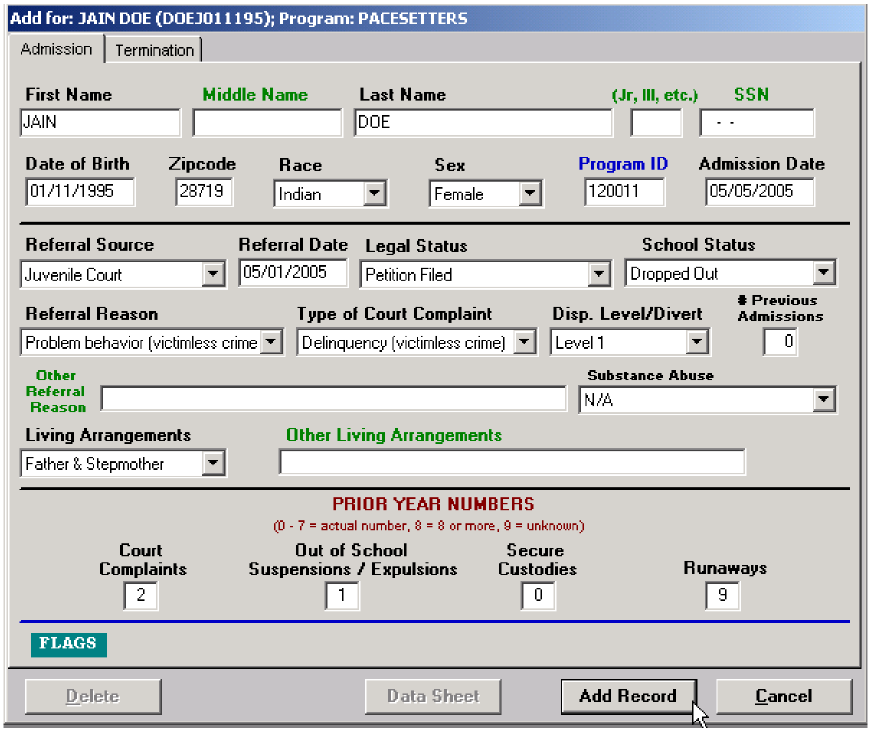


When it is selected, you get the following form. In this case, we have added data for Jain Doe.

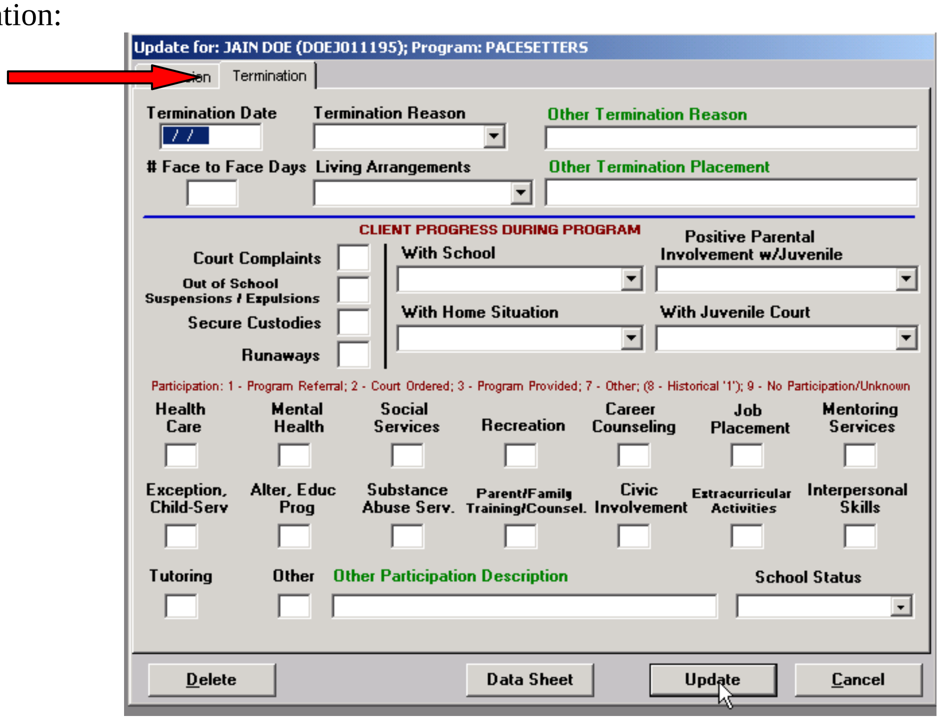


STEP 3: Enter the required information (with **black** captions—first name, last name, etc.) plus any optional information (**green** captions) and click the *Add Record* button. Then enter the remainder of the Admission tab information and click the *Add Record* button.

STEP 4: The screen shown below is displayed. Enter the required information (with **black** captions) plus any optional information (**green** captions) and click the *Add Record* button.



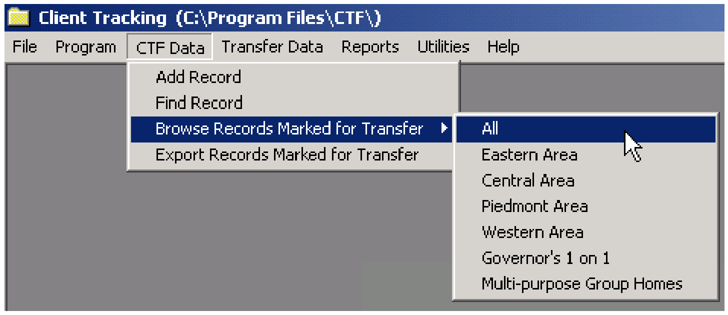
STEP 5: When juveniles have completed a program, click on the Termination tab to add this information:



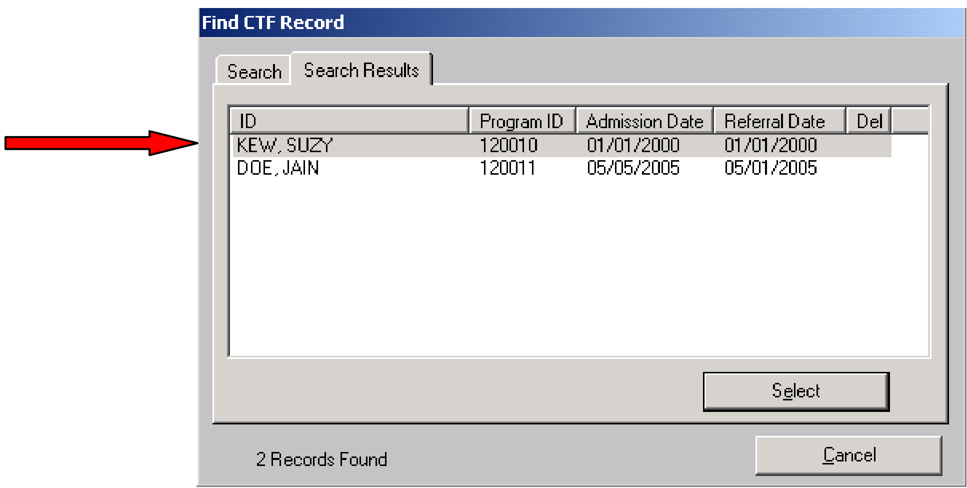
Note: Psychological Services programs (Type 31) only need to fill in required information above the blue line (above **Client Progress During Program** caption). All other program types must fill in all other required information.

REVIEWING / CREATING A TRANSFER FILE

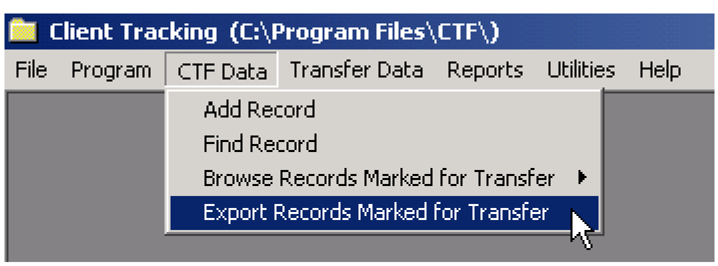
A. The "Browse Records Marked for Transfer" menu option will let you see which records will be added to the transfer file.



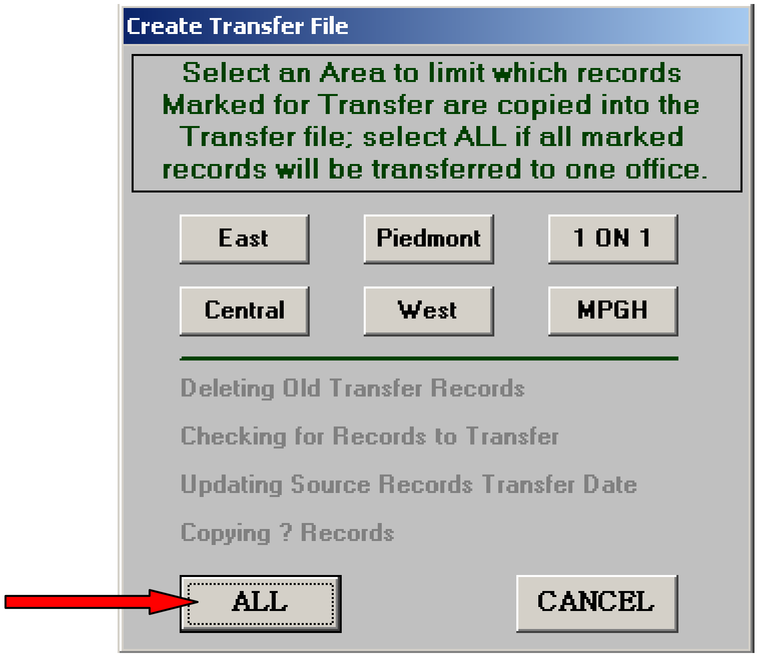
The window below is displayed. Any record that has had update action of any kind will be in this list.



B. The "Export Records Marked for Transfer" menu option copies records to the transfer file.

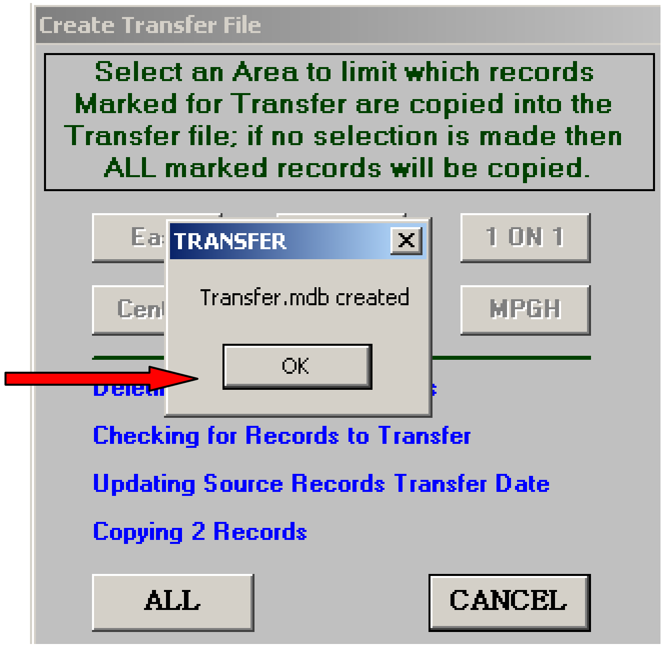


Once that option is selected, the window below is displayed:



On this window, you can select to limit the transfer files to a specific region, or you can press *All* for a complete transfer file.

Clicking the *All* button or one of the region buttons will create the transfer file. Click *OK* to complete the process:



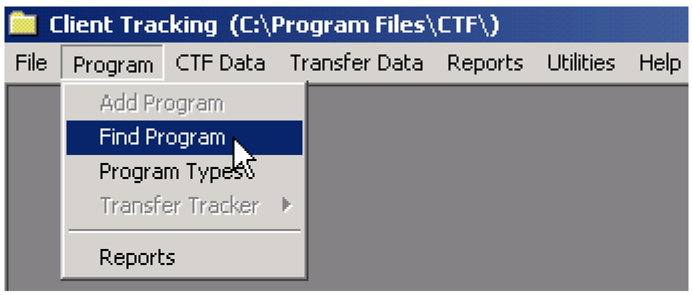
NOTE: ***DO THIS EACH MONTH PRIOR TO SENDING YOUR TRANSFER FILE TO THE AREA OFFICE.*** **If the area office has a problem with your Transfer file, you can simply re-send the file. However, if you have made additional changes that you want included in the Transfer file, you will need to "Export Records Marked for Transfer" again (prior to sending the Transfer file).**

This reminder will appear on your CTF screen near the end of the month and at the beginning of the month if records need to be sent to the area office. Transfer files are due at the area office by the **5th** of the month, unless there have been no updates to any records. In this case, notify the area office (by the **5th**) that no updates were done.

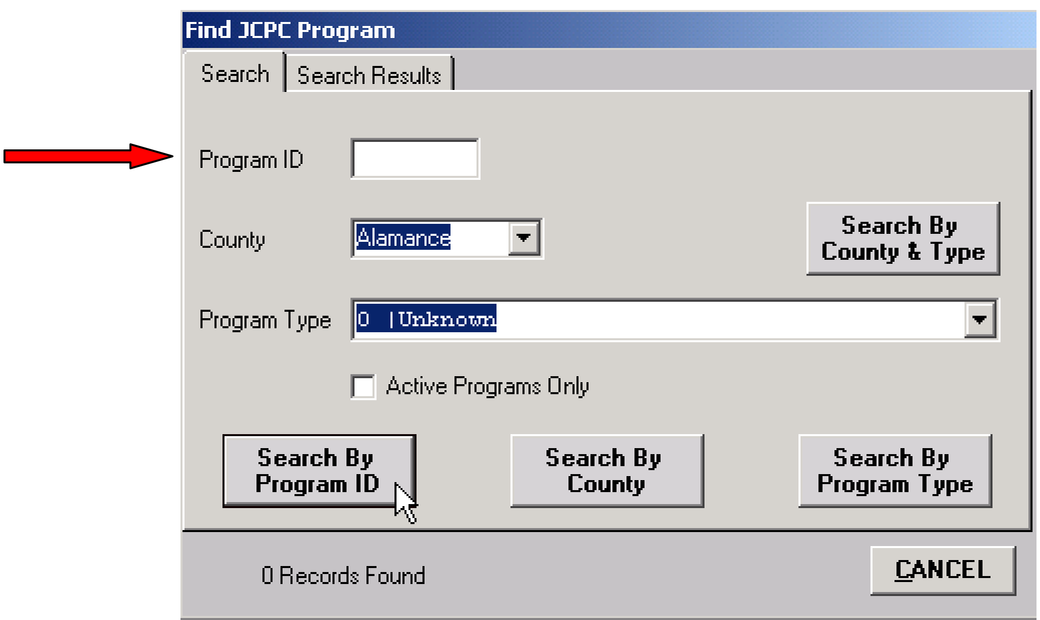
FINDING A PROGRAM

In order to search for a specific program, follow the steps listed below.

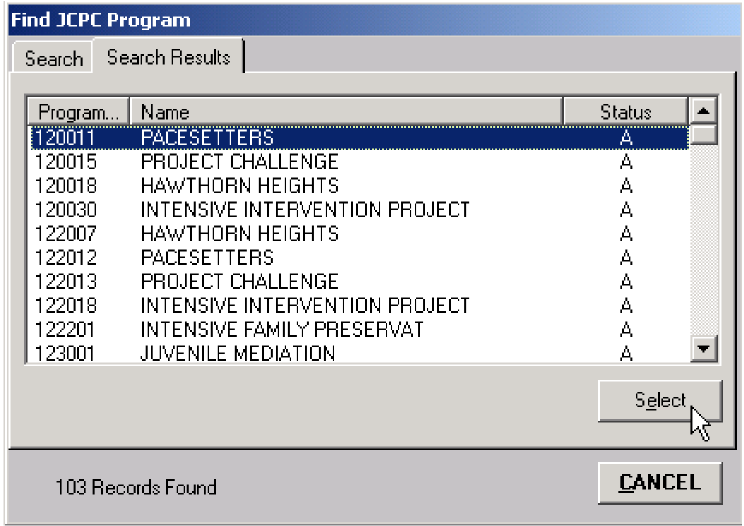
STEP 1: Click on the Program menu option from the main menu bar. Click on the "Find Program" choice to search for a program.



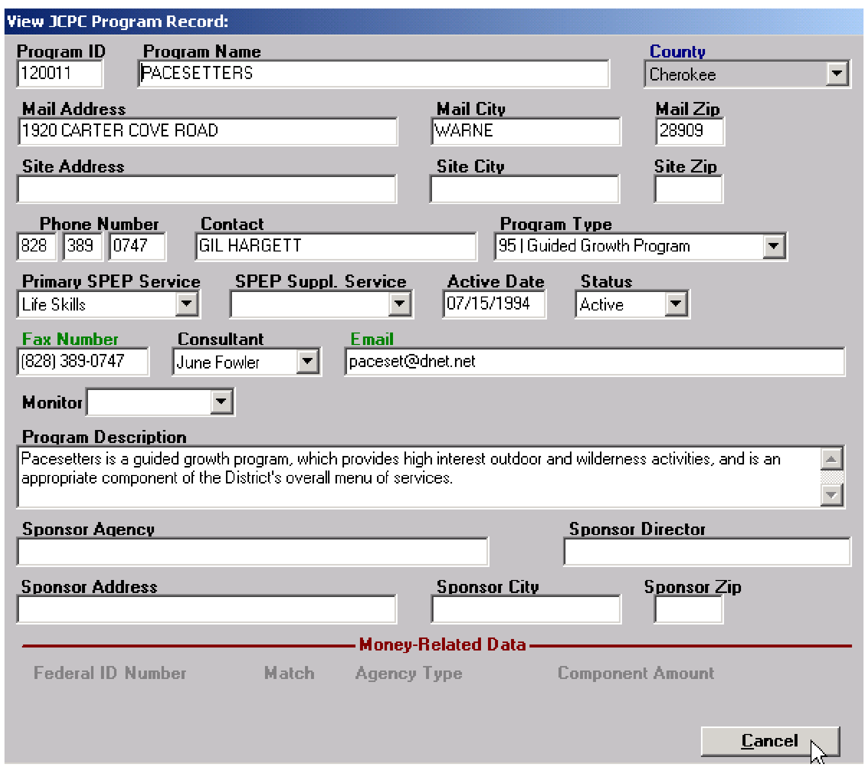
STEP 2: After choosing "Find Program" you will see the form below. You can search by entering all or part of a program ID, selecting a county, selecting a program type, or combination of county and program type. Additionally, there is a checkbox to limit the search to just active programs. For example, enter a 1 in the Program ID box and click *Search By Program ID.*



STEP 3: Highlight the program for which you are searching on the Search Results tab and either click on the *Select* button or double click on the selected program.



STEP 4: The information for the selected program as shown below.



TRANSFERRING FILES

NOTE: *REMEMBER TO EXPORT RECORDS MARKED FOR TRANSFER EACH MONTH PRIOR TO PERFORMING THIS ACTION.*

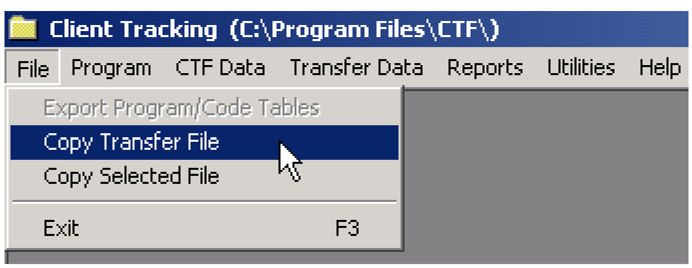
The preferred method to send a Transfer file to the area office is via an email attachment. If this method is used, then in your email program attach the Transfer file created earlier. The location of this file is in your CTF application folder (if installed without changing anything, this will be ***C:\CTF***\). The actual name of the Transfer file depends on how it was created:

ALL – Transfer.mdb
CENTRAL – Transfer_C.mdb
EAST – Transfer_E.mdb
PIEDMONT – Transfer_P.mdb
WEST – Transfer_W.mdb
1 ON 1 – Transfer_G.mdb
MPGH – Transfer_M.mdb

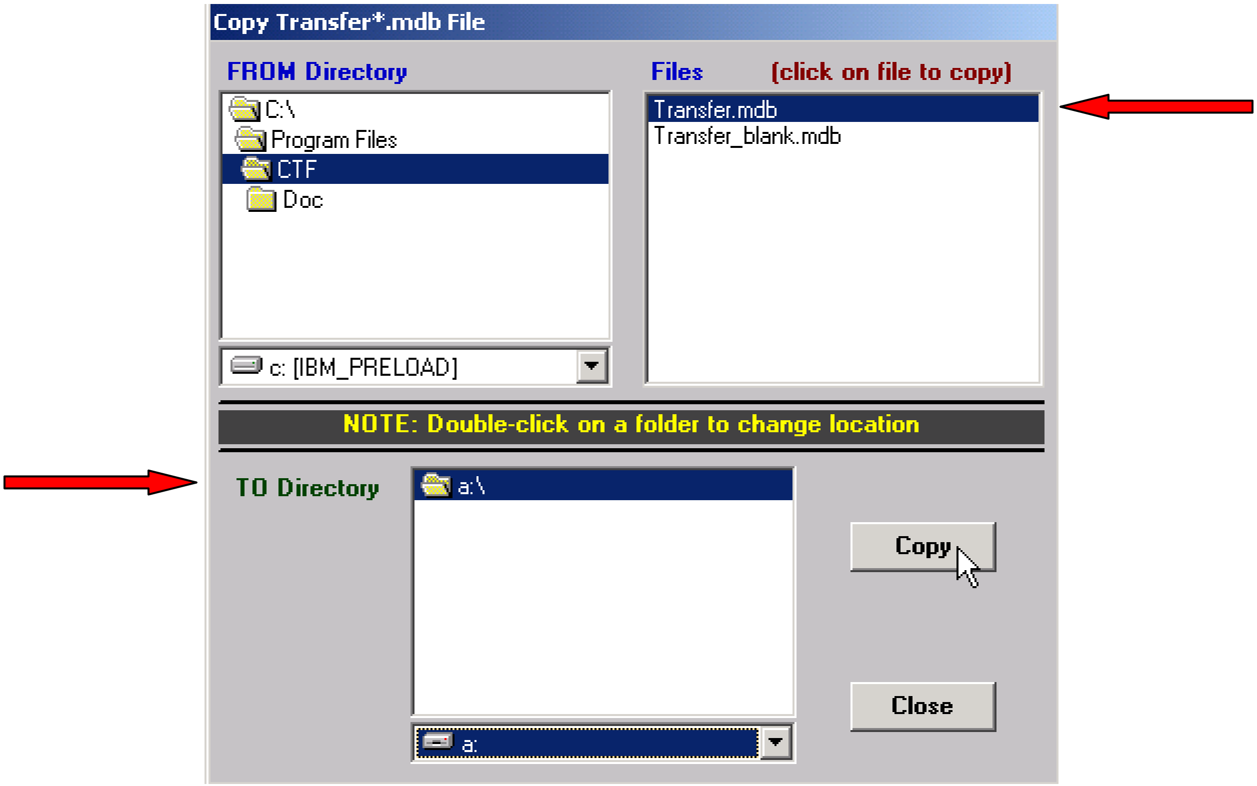
NOTE: *The Transfer file is not deleted by the CTF application until you* **Export Records Marked for Transfer** *again using the same selection. Until then, it can be re-sent in case there was a problem with the last one sent.*

The following instructions will indicate how to transfer files via a diskette.

STEP 1: Click on the File menu option from the main menu bar. Click on the "Copy Transfer File" choice to copy the file.



STEP 2: Select the "Copy Transfer File" to copy the **entire** transfer file to be submitted to the area office. The "Copy Transfer File" option displays the following form:



Click on the file you wish to copy (in this example, it is “Transfer.mdb”). Then select the “A” drive in the dropdown at the bottom of the form. The “Copy To” option button, at the bottom of the picture above, is used to copy the file to a diskette. The “Directory” box on the left hand side (where the arrow is pointing) is used to point where to put the file. Press the *Copy* button.

STEP 3 (Program Level User): Mail the diskette containing the copied file to the area office.

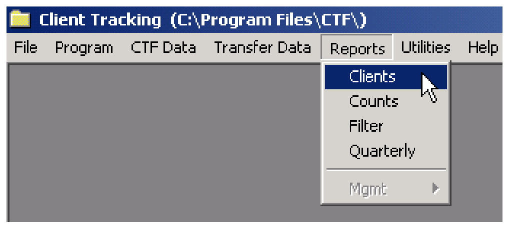
STEP 4 (Area Office User): Click on “Copy From” the A: disk given by the program level user, and “Copy To” your CTF folder before importing the data.

STEP 5 (Area Office User): Create your own Transfer file for the central office.

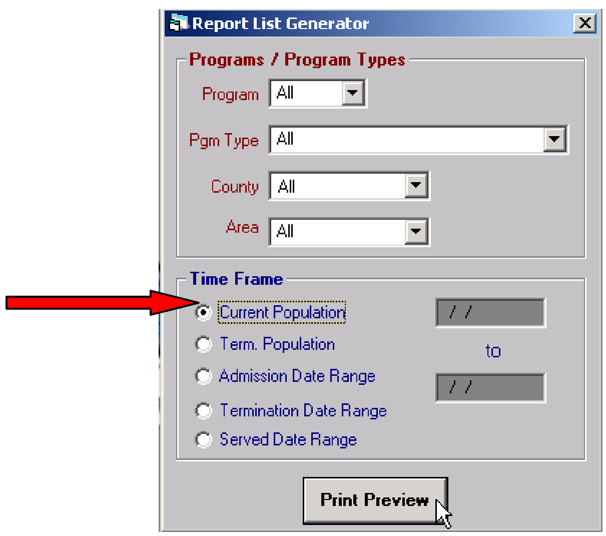
GENERATING CLIENT REPORTS

In order to generate reports about juveniles and programs, follow the steps listed below.

STEP 1: Click on the Reports menu option from the main menu bar. The Report option will let you produce reports on individual clients, or on demographic characteristics of people in a specified program. Select the "Clients" choice to produce reports about clients in a program



STEP 2: The "Clients" choice provides the following form. Select the specific program, program type, or county, along with other options in the "Time Frame" list, to produce a report. The "Program," "Program Type," and "County" options are mutually exclusive. Only one "Time Frame" choice can be made. In the case below, "Current Population" was selected.



Click the *Print Preview* button to view the report. It looks like:

NC Department of Juvenile Justice and Delinquency Prevention

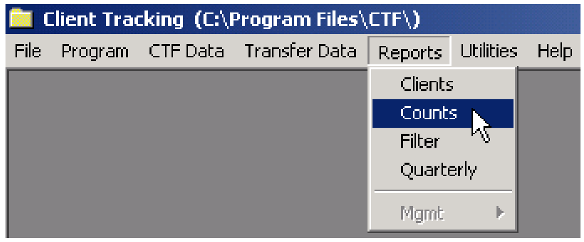
Client Listing

ALL PROGRAMS

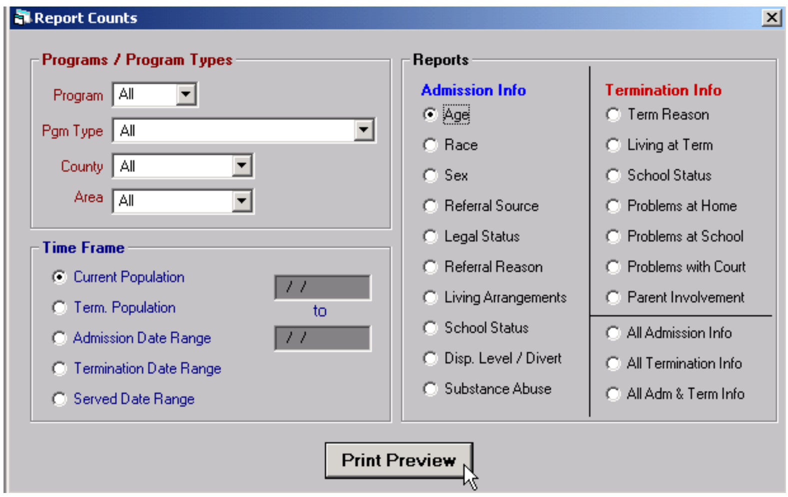
	Admission Date	Age	Race	Sex	Referral Source	Term. Date	Days	Stay
PROGRAM ID: 120010	*MOTIVATIONAL ADVENTURES*							
KEW, SUZY	01/01/2000	11	Black	Female	Self			
Total Clients in Program: 1								
PROGRAM ID: 120011	*PACESETTERS*							
DOE, JOHN Q	06/06/1996	11	White	Male	School Resource Of			
Total Clients in Program: 1								
TOTAL 2								

GENERATING DEMOGRAPHIC REPORTS

STEP 1: Click on the Reports menu option from the main menu bar. To produce reports providing demographic information for clients in a program, select the "Counts" choice.



STEP 2: The "Counts" choice provides the following form. Select "Admission Info" or "Termination Info" report options to get the number of people by the chosen criteria. These also allow for only one choice at a time. In this example, age was chosen as the criteria.



STEP 3:. Press the *Print Preview* button. This report looks like:

NC Department of Juvenile Justice and Delinquency Prevention

Admissions By Age

ALL PROGRAMS

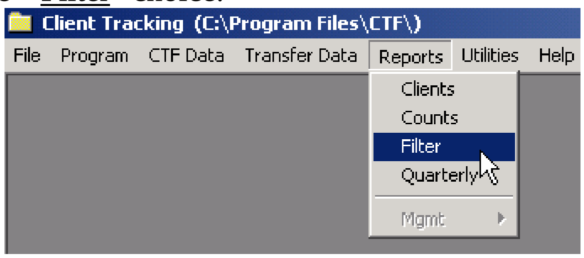
Current Population

Age	Count	%
11	2	100.00
TOTAL	**2**	

USING THE REPORT FILTER

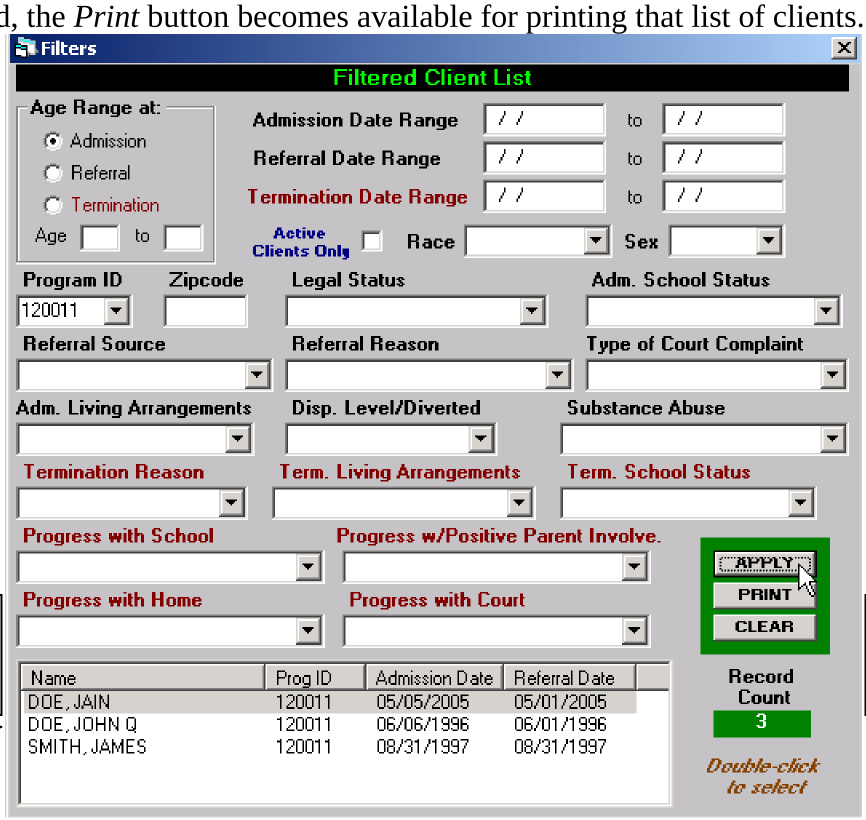
The "Filter" option (under the Reports menu option) allows you to generate a client list based on variable criteria.

STEP 1: Click on the Reports menu option from the main menu bar. To produce reports using the filter feature, select the "Filter" choice.



STEP 2: The form below is displayed. Note that while a wide variety of combinations are possible, you cannot check "Active Clients Only" and include (among your other selection criteria) **termination** information (marked in **maroon**). After choosing your selection criteria, you must click *Apply* in order to generate a list of records. After a list has been generated, if you subsequently change some selection criteria, then you must click *Apply* again to get the desired results.

Double-clicking a client in the generated list will bring that record up for editing. Also, once a list is generated, the *Print* button becomes available for printing that list of clients.

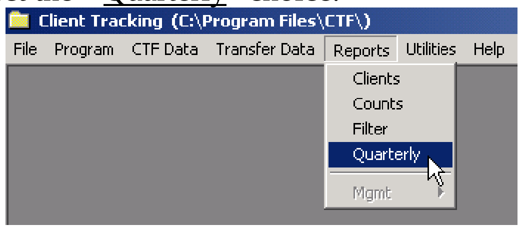


The list of youth meeting the filter criteria.

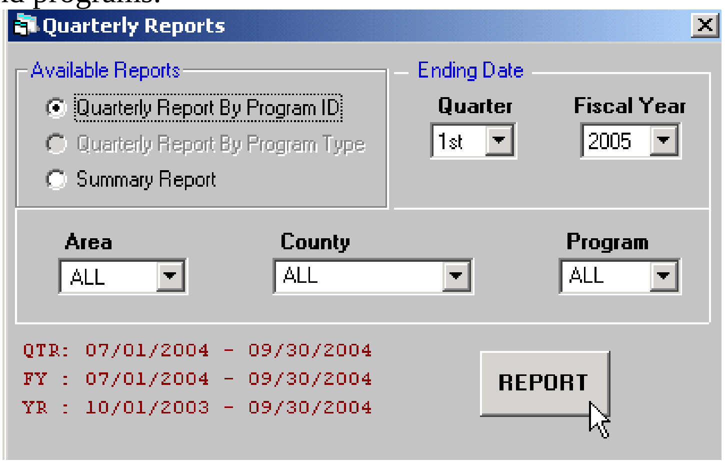
Enter your criteria, and then click the *Apply* button

GENERATING QUARTERLY REPORTS

STEP 1: Click on the Reports menu option from the main menu bar. To produce reports summarizing quarterly data, select the "Quarterly" choice.



STEP 2: The "Quarterly" choice provides the following form. For this example, the defaults, which are shown below are used. The report will generate quarterly statistics by program ID for all areas, counties, and programs.



STEP 3:. Press the *Report* button. This report is shown below. Please note, this is a lengthy report, so only the first portion is displayed.

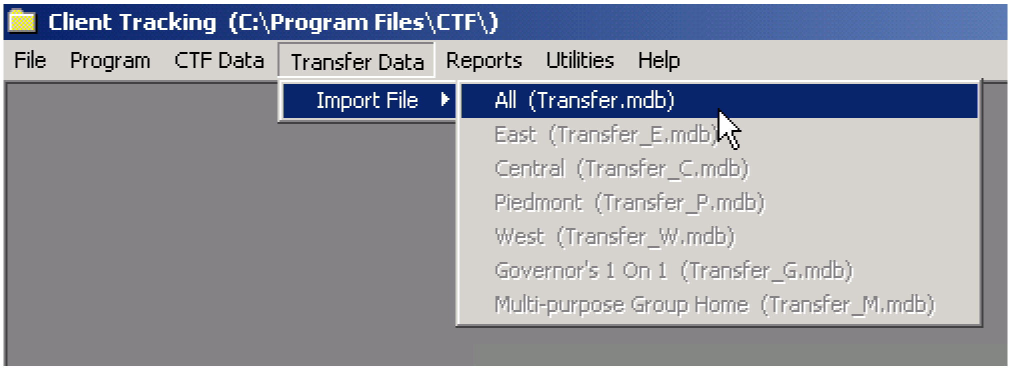
N.C. Department of Juvenile Justice and Delinquency Prevention
Programs for Fiscal Year 2004-2005
Quarter: First

		Current Quarter 07/01/2004 - 09/30/2004	Fiscal YTD 07/01/2004 - 09/30/2004	Last 12 Months 10/01/2003 - 09/30/2004
PROGRAM 120011 PACESETTERS				
Cherokee County	Western Area	Type 95 - Guided Growth Program		
Counts				
Start Count		1	1	1
Admissions		0	0	0
Youths Served		1	1	1
Terminations		0	0	0
Ending Count		1	1	1
Age At Admission				
< 7		0	0	0
7 - 9		0	0	0
10 - 13		0	0	0
14 - 17		0	0	0
> 17		0	0	0
	TOTAL	**0**	**0**	**0**
Race				
White		0	0	0
Black		0	0	0
Indian		0	0	0

USING TRANSFERRED FILES

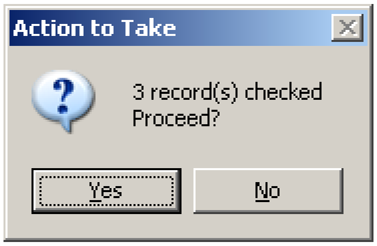
The Transfer Data menu option lets you import the transfer records.

STEP 1: Click on the Transfer Data menu option from the main menu bar. To search the file for individual clients, select the "Import File" choice. Next, you can chose which transfer file you would like to pick or just choose All, as in the example below



STEP 2: The "Import File" choice will verify the data in the transfer file and indicate how many records there. The first step in this process is verifying the records. For this dialog, press the OK button.

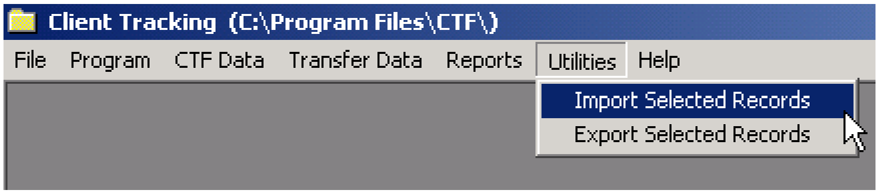
Next, the system will ask you if you want to proceed with the import process. If you respond *Yes*, all records will be imported.



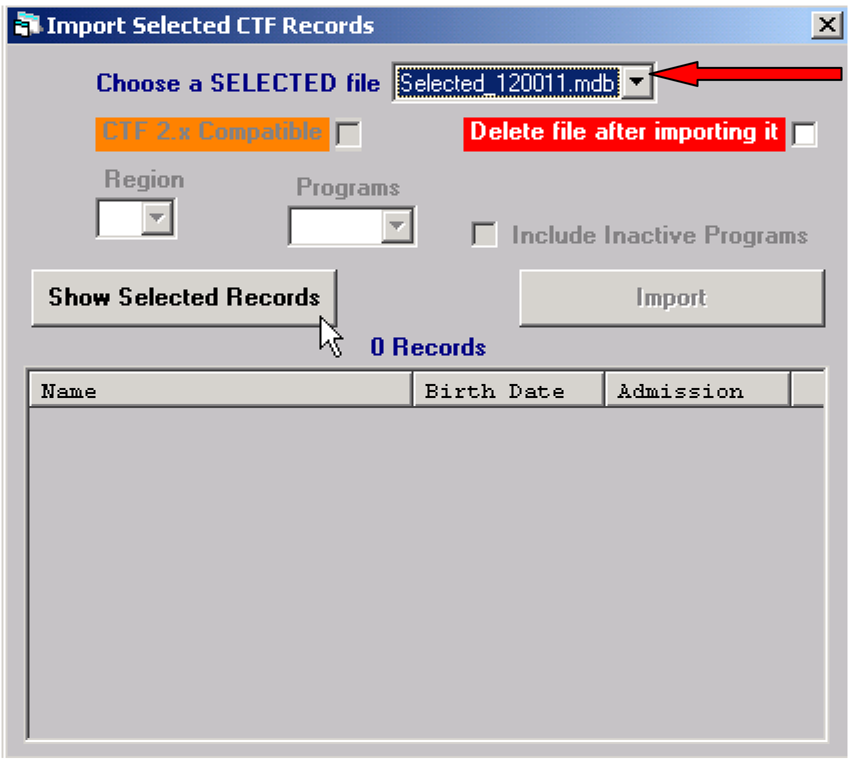
UTILITIES IMPORT OPTION

The Utilities menu option is used in emergency situations where information is lost, and needs to be replaced.

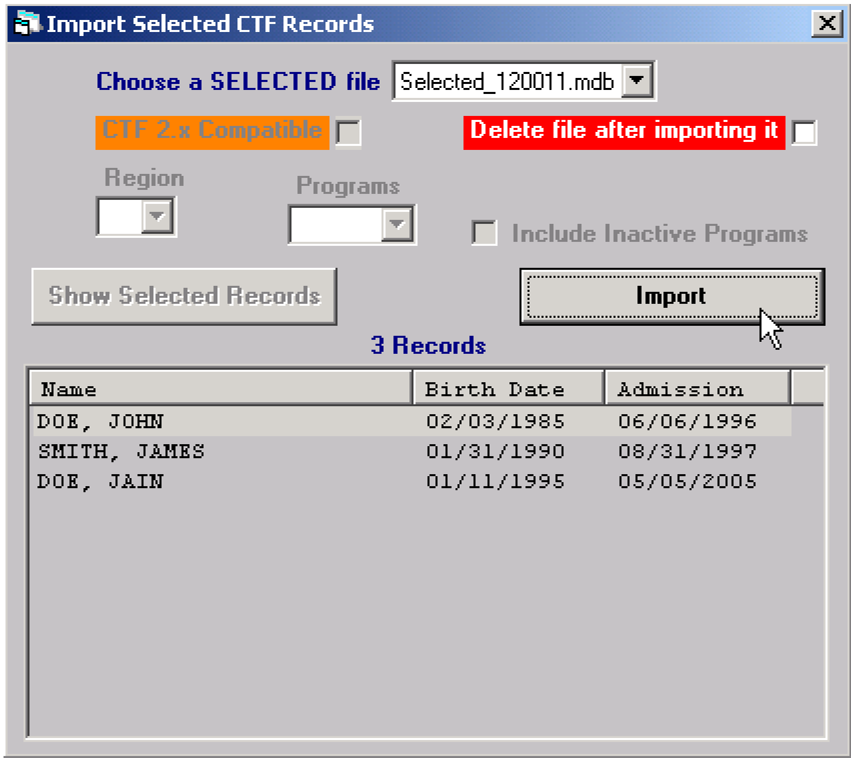
STEP 1: Click on the Utilities menu option from the main menu bar. To import records that will replace the lost information, select the "Import Selected Records" choice.



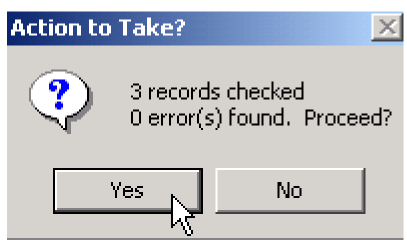
STEP 2: The "Import Selected Records" choice is used by program level users or area office users in emergency situations, to restore lost data. The choice displays the following form. First choose the file that you wish to import. In the example below, the data from program 120011 will be imported. Second, Click the *Show Selected Records* button to show the records that can be replaced.



STEP 3: These records will appear in the area below the “Name,” “Birth Date,” and “Admission” column titles. After the records are listed, click *Import* to replace the lost records. In the example below, three records will be imported.



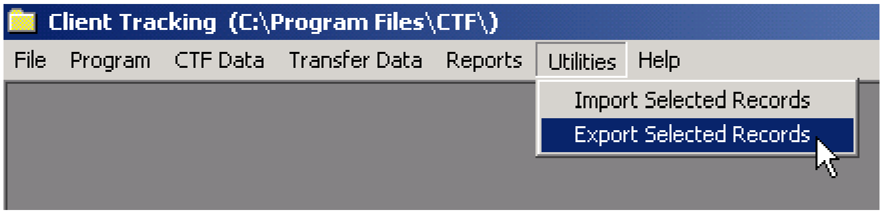
STEP 4: You will be asked to confirm the import by the dialog below. Click *Yes*.



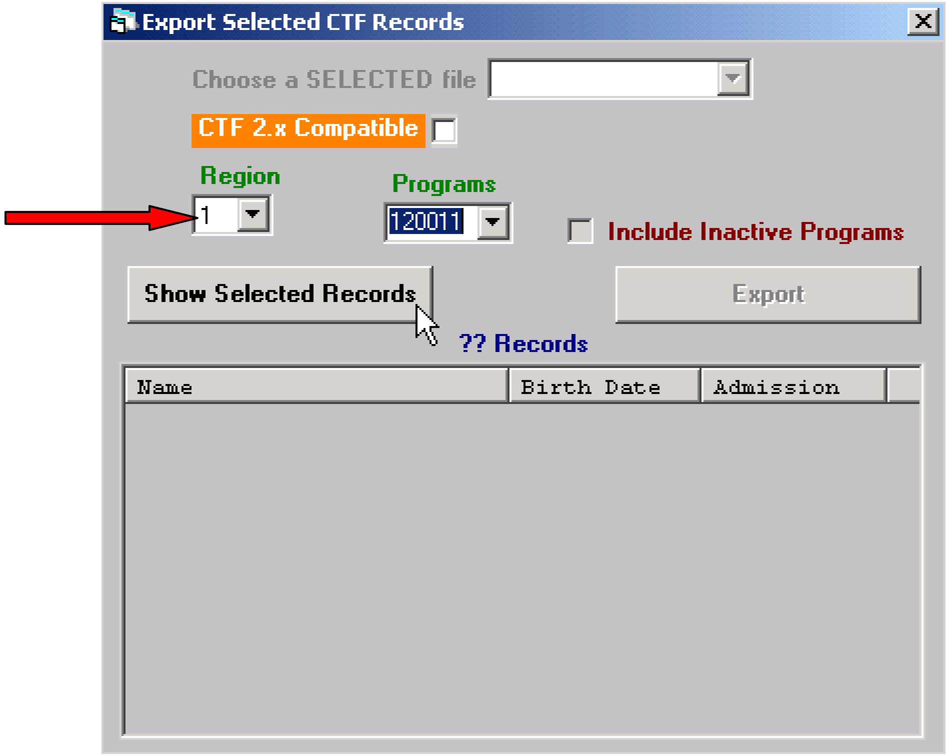
UTILITIES EXPORT OPTION

The Utilities menu option is used in emergency situations where information is lost, and needs to be replaced.

STEP 1: Click on the Utilities menu option from the main menu bar. To export records that will replace the lost information, select the "Export Selected Records" choice.

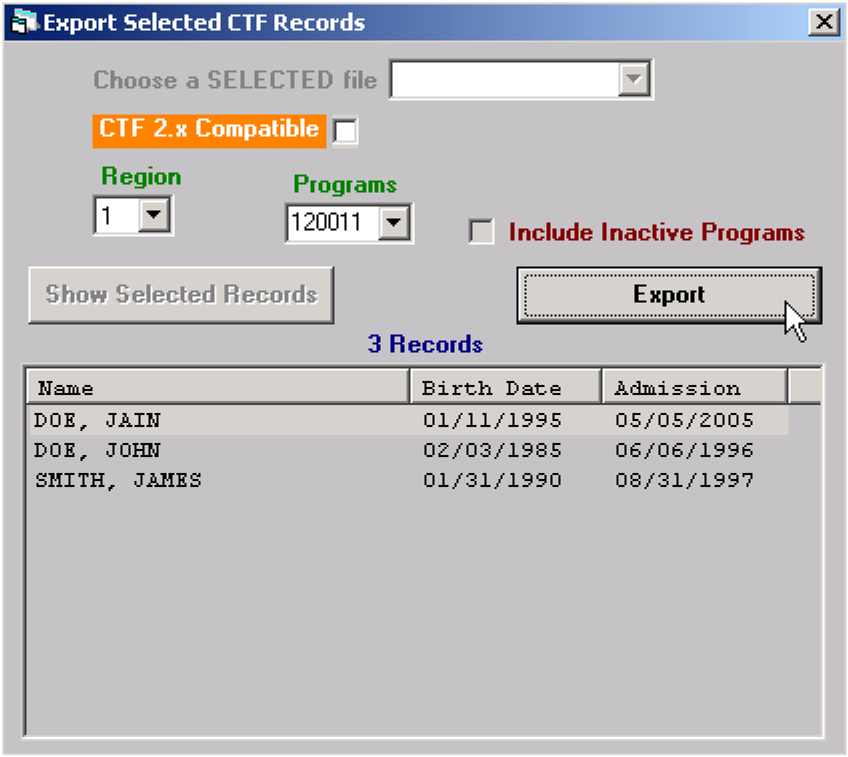


STEP 2: The "Export Selected Records" choice is used by the DJJDP Central Office or area office users in emergency situations, to restore lost data. The choice provides the following form. Select the Region, and the program will populate the Programs dropdown with the Program IDs available for selecting. Choose a Program ID from the list. In the example below, Region 1 and Program 120011 is selected. (See ***NOTE*** at end of section about **CTF 2.x Compatible** option).

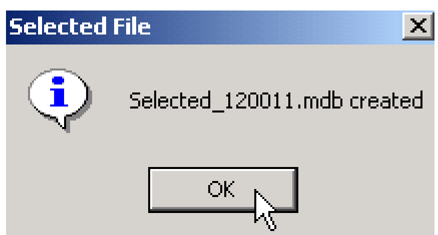


STEP 3: Click the *Show Selected Records* button to show the records that would be exported. These records will appear in the area below the "Name," "Birth Date," and "Admission" column

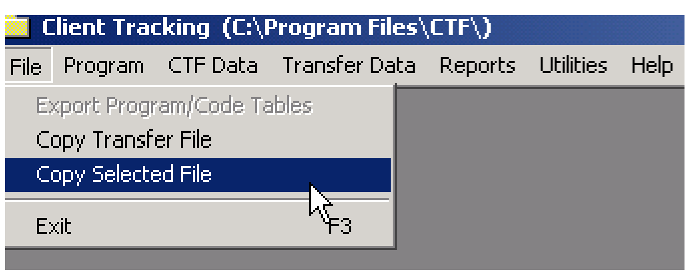
titles. The illustration below has three records listed. After the records are listed, click *Export* to copy the listed records into the Selected file.



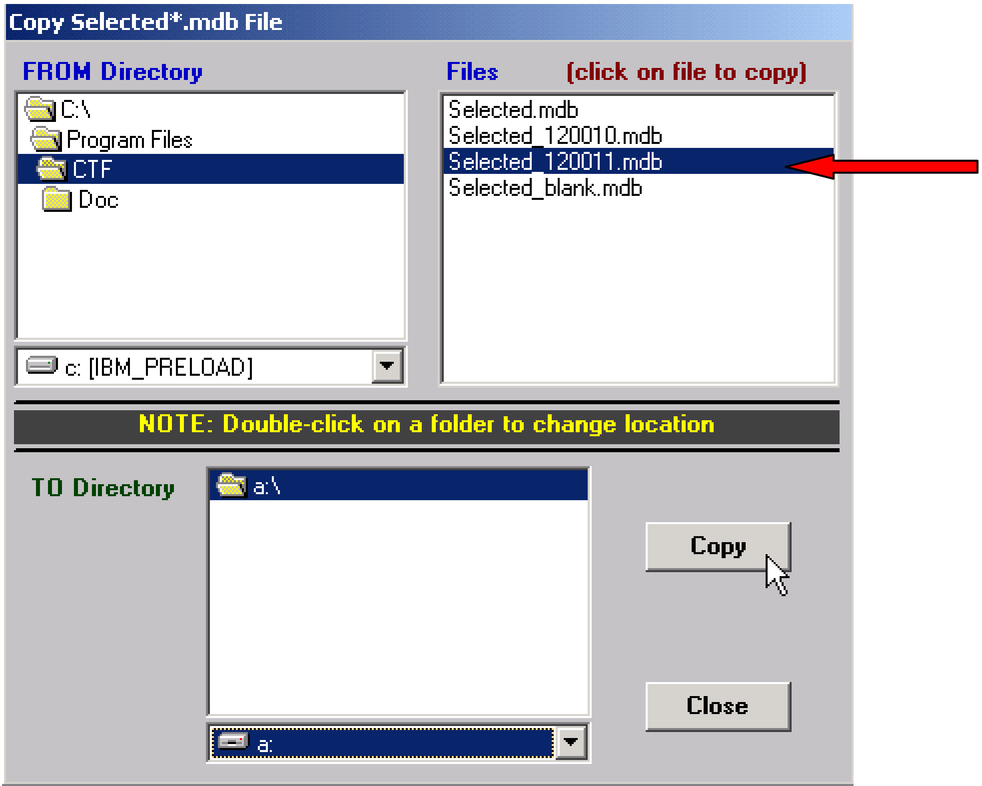
STEP 5: The system will then produce a dialog with the file name. In the example below, the file name is **Selected_120011.mdb**. Click *OK*.



STEP 5: If necessary, the Selected file can be copied to a diskette in a similar manner to that of copying a Transfer file. However, you would choose <u>File</u> (from the menu bar), and then the <u>Copy Selected File</u> option (and proceed in a similar manner as when copying a Transfer file).



STEP 6: Copy the file to a diskette (if a diskette is used in the file transfer process). The "Copy To" option button, at the bottom of the picture above, is used to copy the file to a disk. The "Directory" box on the left hand side (where the arrow is pointing) is used to point where to put the file.



NOTE: The **CTF 2.x Compatible** option is for creating a Selected file with the following differences:

- The file name is **Selected.mdb**, which is the only name used in version 2.x.
- The identifying information is not encrypted (it is in version 3.x)

Therefore, if the user who will be importing the Selected file is using version 2.x, then this option *must* be selected for them to import the Selected file.