Part 4: Using the Power Behind the Process
Entering Data & Generating Reports

The Power Behind the Process, PowerPath's specially designed software, is an essential piece of the PowerPath System. PowerPath's software is unique, providing specific personalized participant information, recommended adaptations and strategies, as well as data management features geared toward program and administrative needs.

PowerPath's software uses intake and screening results to produce a wide variety of powerful Individual and Administrative Reports. These reports are fundamental to supporting PowerPath as a transformational learning system and achieving desired outcomes for both participants and programs.

What can PowerPath's software do for me?

Once the software is installed, participant data can be entered. The entered data can then be used to create a variety of useful reports. When participant Personal Profile data, Diagnostic Screening results, and Exit Data have been entered, PowerPath's software will produce two key types of reports:

1. **Individual Reports**

   The software records Personal Profile information, analyzes Diagnostic Screening results and offers several report options that:
   - Summarize Personal Profile information
   - Interpret diagnostic screening results
   - Prescribe personalized adaptations and strategies for the participant to build needed skills

2. **Administrative Reports**

   PowerPath's software provides administrative reports that:
   - Profile participants by aggregating Profile information and Diagnostic Screening results
   - Combine participant information from multiple sites or groups
   - Track participant gains, goals achieved, and contact hours for documenting outcomes

How do I install the PowerPath software?

PowerPath's software is Windows-based. (However, it could be used on a MacIntosh if virtual machine software is installed -- may need an IT professional to set up.)

Notes on Installation of PowerPath Software

- **Please read the QuickStart Guide** included in the PowerPath software envelope. This quick read provides instructions and important warnings for installation, as well as valuable tips for getting started and making the most of the software.
- **Be aware that you must have a serial number in order to install PowerPath.** The software will not be accessible without this licensing information. The software's serial number can be found on the software envelope and again on the CD case. Save the serial number. The serial number will be needed if the software needs to be reinstalled.
- **Installing the software is simple.** Insert the PowerPath Installation CD into your CD drive and follow the step-by-step, on-screen instructions.
- **If this installation is an update** from a *recent* previous version of PowerPath software, the software will ask if you want to convert your existing PowerPath data to the new version. Answering **Yes** will automatically incorporate all of the existing data into the new software.

This list is continued on Part 4: 2

For the latest updates and information, visit www.powerpath.com and click on the 'Tech Support' tab.

- **Back-up all previous PowerPath data** (Utility menu) prior to updating to the newest software version.
- **This software version cannot be installed on a network.** The program must be installed directly on your computer's C:\ drive or there is a risk of damaging all files and losing your data. The TLP Group is not responsible for lost data.

How do I get started?

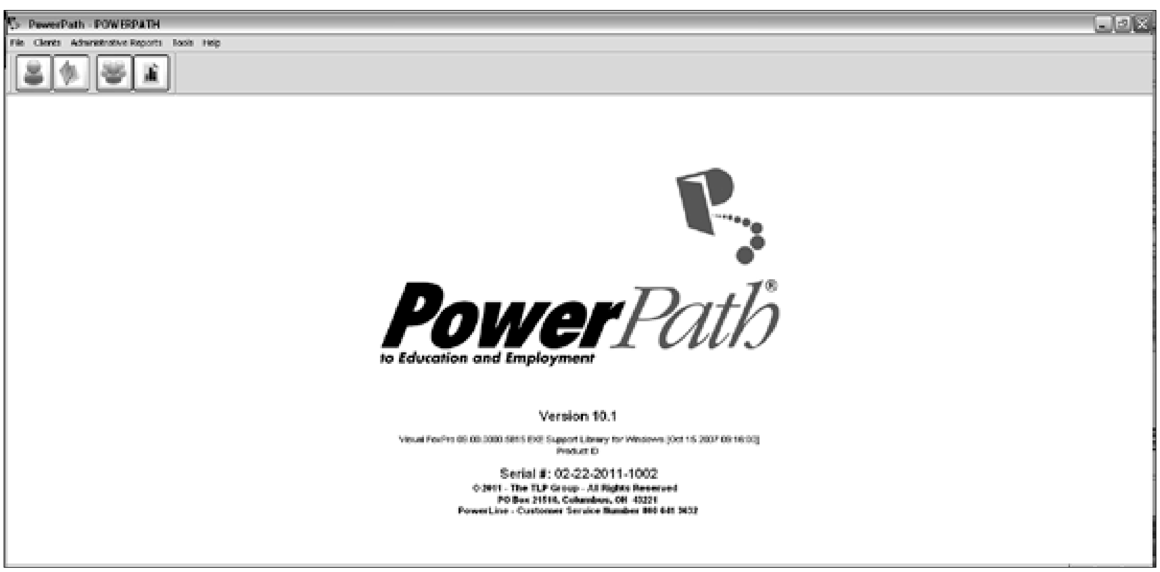
Getting started using PowerPath's software is not difficult. Please read this section *after* the PowerPath software has been installed, and the program is open and running.

There are three major areas in the software:

1. Personal Profile Information
2. Screening Results
3. Individual and Administrative Reports

The opening screen introduces the basic software options.

- Home Page *See Screen Shot 1 - Home Page*
  The opening screen shows the Version Number of your software. Specific version details appear when cursor is rolled over the Version Number text.
- Upper Tool Bar *See Screen Shot 2 - Upper Tool Bar*
  The upper tool bar buttons are for accessing the main basic software functions -- Client Profile, Individual Reports, Service Sites and Groups, and Service Summary. (When you roll your cursor over tool bar buttons, a description of each button's function will appear..)



Screen Shot 1 - Home Page

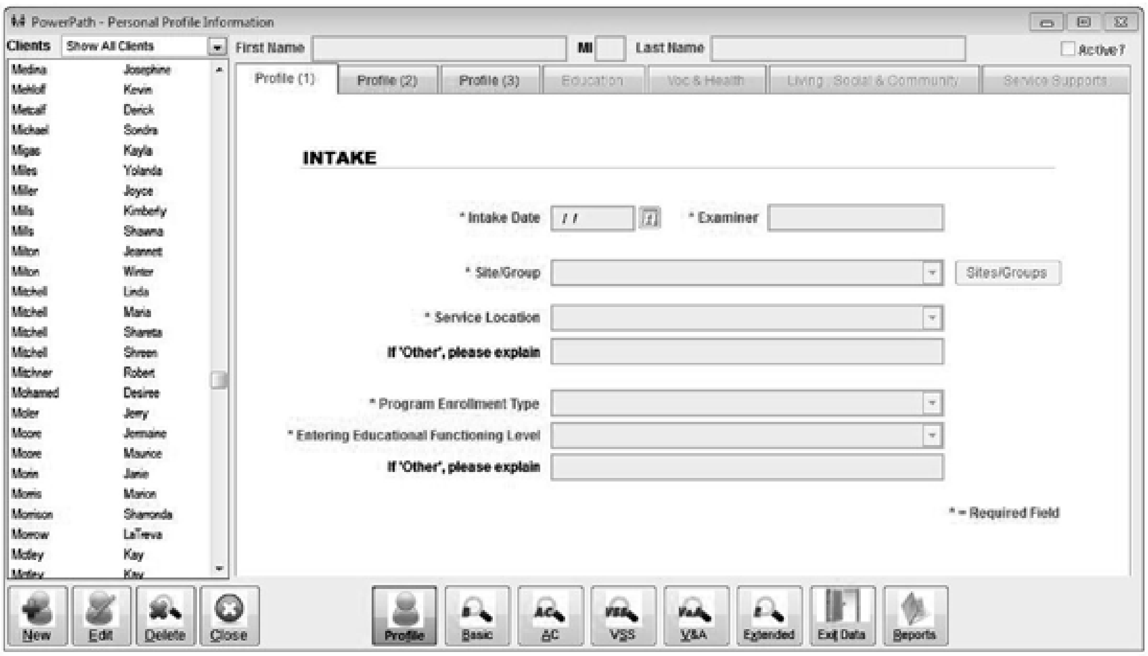
Screen Shot 2 - Upper Tool Bar

1 2 3 4

1 Client Profile
2 Individual Reports
3 Service Sites and Groups
4 Service Summary

After choosing your desired client data function, a new window will open. This window is the main screen for navigating data entry and report options. *See Screen Shot 3 - Main Navigation Window*

- The Client picklist is always on the left. This column lists all clients entered into the system. Selecting a name from the list allows you to add additional information, access existing data and edit client information.
- The information to the right is the opening screen for each section -- Personal Profile, Screening, Exit Data and Report options. You must choose a client from the Pick List ot enter a new client to access the screening and reporting options.
- Lower Window Navigation Tool Bar
  These buttons will take you to all of the basic functions of the software. This feature helps with faster and more flexible data entry. (When you roll your cursor over tool bar buttons, a description of each button's function will appear.)



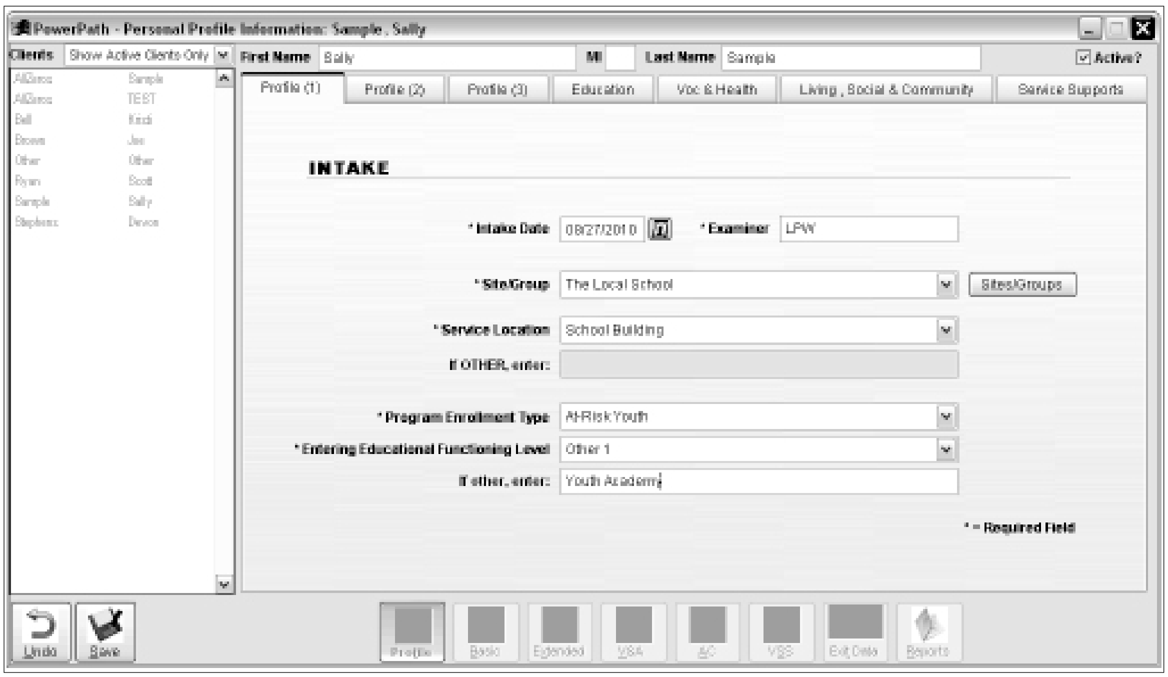
Screen Shot 3 - Main Navigation Window

Screen Shot 4 - Lower Main Navigation Tool Bar

How do I enter Personal Profile information?

Entering Personal Profile information follows the same set of information, in the same order, that is listed on the Personal Profile Folder. The screens for entering Personal Profile information can be accessed by choosing **Clients/Enter Client Information** from the main menu or selecting the **Client Profile** button from the upper tool bar and lower tool bar located at the bottom of the profile information window.

The Personal Profile window of the PowerPath software is divided into 7 tabs or pages. *See Screen Shot 5 - Personal Profile Data Entry* Required fields are in red and will have an asterisk (*). R**equired information on tabs 1- 4 of the Personal Profile screens must be entered to continue with data entry.** Any missing data must be entered prior to adding data to the participant's record. Not entering a participant's complete intake information will limit the accuracy of aggregate data in Administrative Reports.



Screen Shot 5 - Personal Profile Data Entry

<u>Adding New Participants into the System</u>

1. **Click on the New** button on the lower tool bar of the Profile window.
2. **Enter the first and last name** of the participant at the top of window.
3. If applicable, **choose whether this participant is currently active or inactive.**
4. **Enter Profile information**
5. **Click on Save**

Once a participant is added into the system, Personal Profile information can be entered.

SHORT CUTS

- Entering the zip code will automatically populate the city and state fields.
- When entering client profile information, the Intake date field defaults to current date.
- Active/Inactive Clients -- Inactive clients are participants who are no longer in your program. Designating a client as inactive only removes him/her from the Client picklist and can still be accessed by selecting 'show inactive clients' from the Client picklist heading box. Once clients are shown in the picklist, their individual records will function as usual.

Find/Edit Existing Participant Data

To find a client that has already been entered into the system, review the Client picklist on the left side of the Client window. If a participant has already been entered into the system, their name will appear on the Client picklist. Select the desired participant from the list and their information will appear in data fields and can be viewed and/or edited.

When all required fields in the Personal Profile screens are completed, you may access Screening and Exit Data options by selecting the appropriate button on the Client window lower tool bar. Fields are accessed by clicking on **Add** or **Edit**. The pages of the Personal Profile screen can be easily navigated by selecting the <Tab> key after the last field that is entered on each page or by clicking on the next page number.

How can I delete a participant from the system?

A participant's entire record can be deleted from the system. Be aware that if this option is used, all participant data and reports will be deleted. The participant will no longer be included in the Client picklist, List of Persons in the System Report, or Service Summary Report.

To Delete a Client from the System:

1. Go to **Enter Client Information** on the upper Client menu or select the **Profile** button from the lower tool bar.of the Profile window.
2. **Select the participant** from the Client picklist. Select the client's name on the picklist by clicking on the name. The name will be highlighted.
4. **Click on Delete**.
5. When asked if you are sure you want to delete the record, **click Yes**.
   Several warnings will appear. To continue the deletion process, click on **Yes**. If not, click on **No.**
6. **Close the Client window**.

How do I enter Screening data?

The participant's Personal Profile information must be entered into the system before screening data can be entered. After all required Personal Profile data is entered, screening data-entry fields can be accessed. Participant screening data can be added or updated at any time. Options for choosing individual PowerPath screenings can be selected from the Client window lower tool bar. *See Screen Shot 6 - Basic Screening Data Entry.*

Enter Participant Screening Data

The PowerPath software has five options on the Client window lower tool bar for entering Diagnostic Screening information.

- Basic Screening (Attention Challenges, Visual Stress Syndrome, Reading of Single Words, and Visual & Auditory Functions)
- Attention Challenges Screening
- Visual Stress Syndrome Screening
- Visual and Auditory Functions Screenings and Reading of Single Words
- Extended Screening (Information Processing screening areas: Reading Encoding and Decoding, Visual Processing and Auditory Processing)

The Basic Screenings

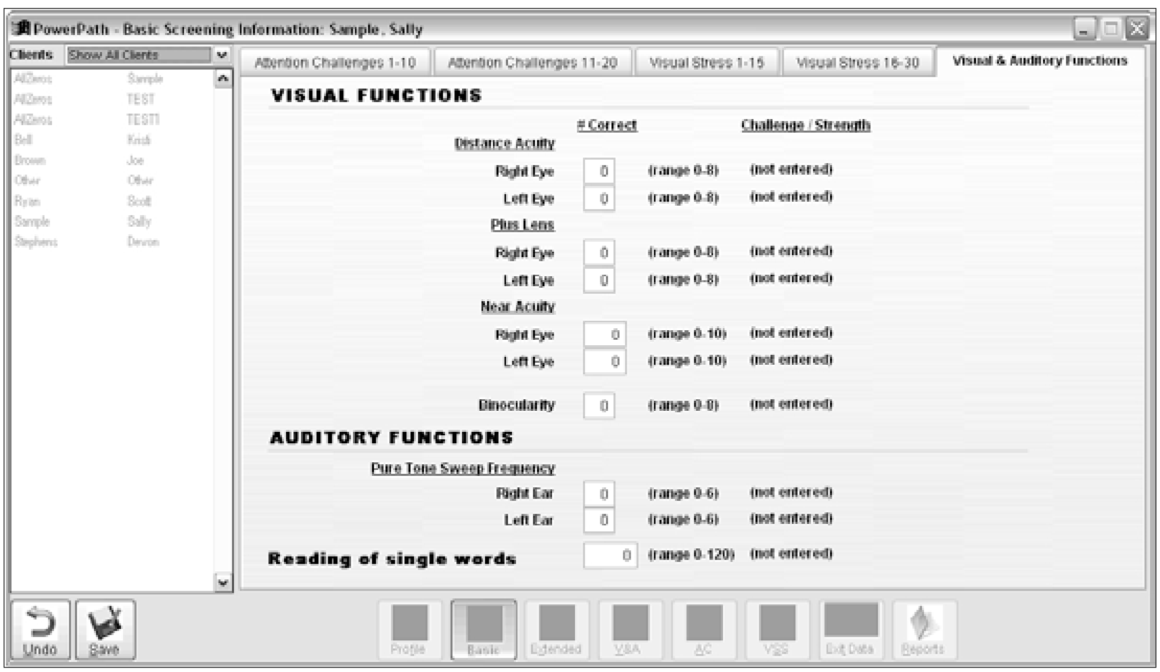
Entering Basic Screening data follows the same format and order that is used in the Screening Plates and in the Basic Response Booklet.

The Basic Screening data entry window has five pages of data to be entered:

- Attention Challenges (two pages: items 1 - 10 and 11 - 20)
- Visual Stress Syndrome (two pages: items 1 - 15 and 16 - 30)
- Visual and Auditory Functions, including Reading of Single Words

Enter Basic Screening Data *See Screen Shot 6 - Basic Screening Data Entry.*

1. Go to **Enter Client Information** on the Client upper tool bar or select the **Profile** button from the Client window lower tool bar.
2. **Select the participant** from the Client picklist.
3. **Click on the Basic button** on the Client window lower tool bar.
4. **Click on Add** or **Edit**.
5. **Enter data** in the appropriate fields. Use <Tab> key or the mouse to move through the pages for all of the Basic Screenings.
6. **Click on Save**.



Screen Shot 6 - Basic Screening Data Entry

The Attention Challenges Screening

The Attention Challenges Screening can be administered as a stand alone screening or with the complete Basic Screening battery either individually or in a group. The Attention Challenges Screening can be administered in three ways

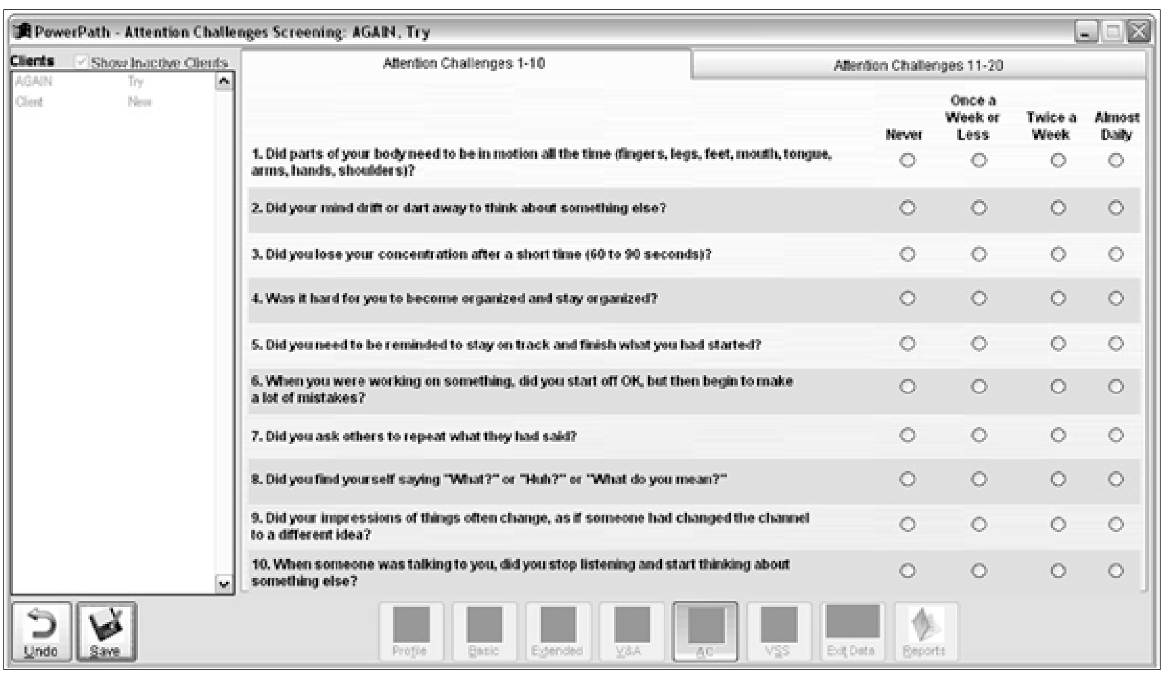
1. Read the Screening Plates and fill-in the participant's responses in the Basic Response Booklet.
2. Read the Screening Plates and have the participant record their own responses on an Attention Challenges Screening Form (this is the process most often used to screen adolescents or adults individually or participants in groups).
3. Read the Screening Plates and directly entering the participant's responses into the Attention Challenges Screening in the PowerPath software. *This option can save valuable time.*

If choosing screening options 1 or 2, screening data can be entered at any time after the screening. Only option 3 offers administering the screening and entering the data at the same time.

To enter the participant's response for each item, use either the <Tab> key or the mouse to select response (Never, Once a Week, Twice a Week, Almost Daily). Click the circle under the response heading on the same line as the corresponding question. Questions are listed in the same order as they are on the screening form.

Enter Attention Challenges Screening Data *See Screen Shot 7 - Attention Challenges Data Entry.*

1. Go to **Enter Client Information** on the Client upper tool bar or select the **Profile** button from the lower tool bar.
2. **Select the participant** from the Client picklist.
3. **Click on the AC (**Attention Challenges) button on the Client window lower tool bar.
4. **Click on Add** or **Edit**.
5. **Enter data** in appropriate fields. You may use the <Tab> key or mouse to move through the fields.
6. **Click on Save.**



Screen Shot 7 - Attention Challenges Screening Data Entry

The Visual Stress Syndrome Screening

The Visual Stress Syndrome Screening can be administered as a stand alone screening or with the complete Basic Screening battery either individually or as a group. The Visual Stress Syndrome Screening can be administered in three ways:

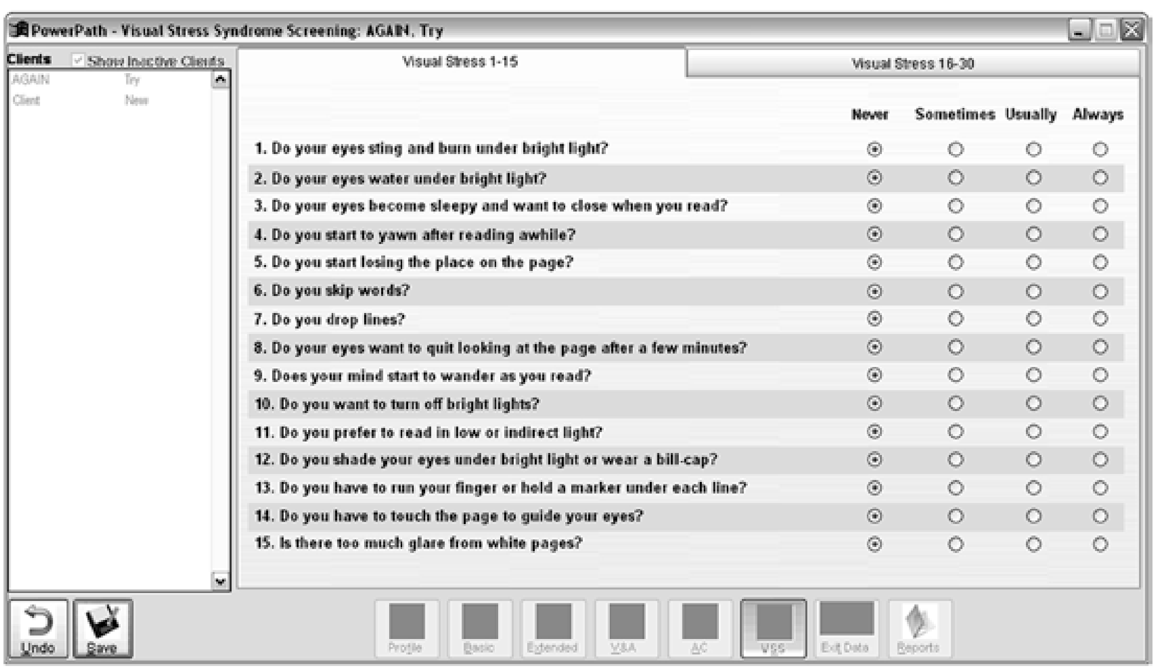
1. Read the Screening Plates and fill in the participant's responses in the Basic Response Booklet.
2. Read the Screening Plates and have the participant record their responses on a Visual Stress Syndrome Screening Form (this is the process most often used to screen adolescents or adults individually or participants in groups).
3. Read the Screening Plates and directly enter the participant's responses into the Visual Stress Syndrome Screening in the PowerPath software. *This option can save valuable time.*

If choosing screening options 1 or 2, screening data can be entered at any time after the screening. Only option 3 offers administering the screening and entering the data at the same time.

To enter the participant's response for each item, use either the <Tab> key or the mouse to click on the selected response option (Never, Sometimes, Usually, Always). Click on the circle under the response heading on the same line as the corresponding question. Questions are listed in the same order as they are on the screening forms.

Enter Visual Stress Syndrome Screening Data *See Screen Shot 8 - Visual Stress Syndrome Screening Data Entry.*

1. Go to **Enter Client Information** on the Client upper tool bar or select the **Profile** button from the lower tool bar.
2. **Select the participant** from the Client picklist.
3. **Click on the VSS (**Visual Stress Syndrome) button on the Client window lower tool bar.
4. **Click on Add** or **Edit**.
5. **Enter data** in the appropriate fields. You may use the <Tab> key or the mouse to move through the fields.
6. **Click on Save.**



Screen Shot 8 - Visual Stress Syndrome Screening Data Entry

The Visual and Auditory Screenings and Reading of Single Words

The Visual and Auditory Function Screening can be administered as a stand alone screening or with the complete Basic Screening battery either individually or as a group using stations. Entering Visual and Auditory Functions Screenings results follows the same format and order that is used in the Screening Plates and in the Basic Response Book.

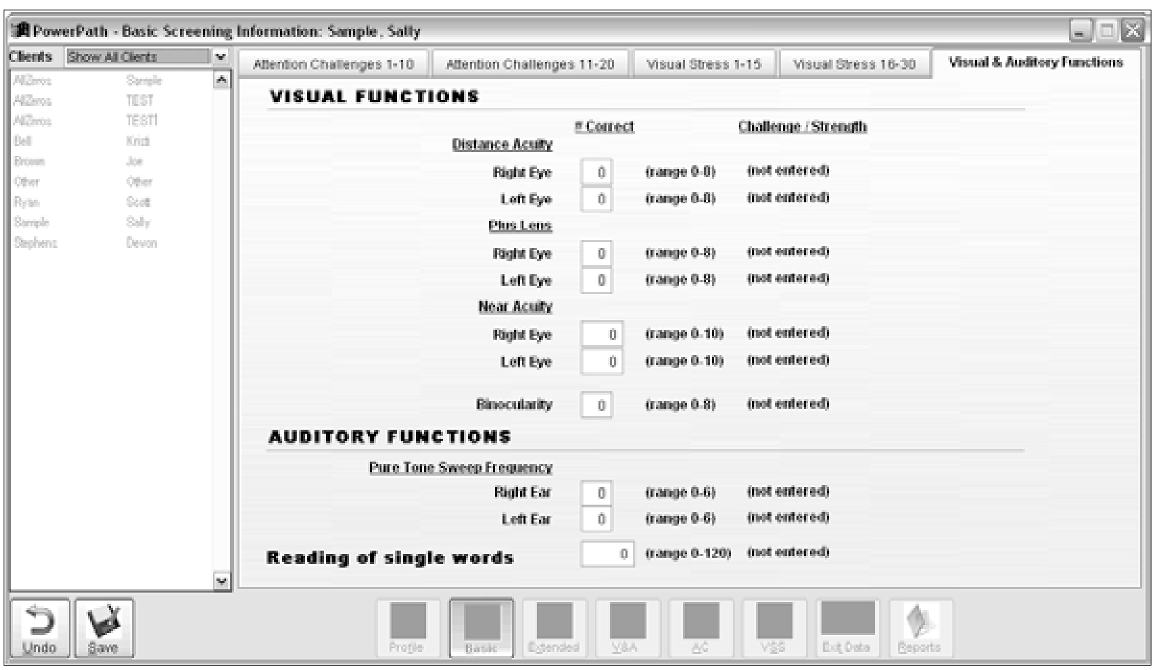
The Visual and Auditory Functions Screenings results are on the same software screen/page with the Reading of Single Words. The range of scores for each of the Visual and Auditory screenings are shown to help with data entry and to determine whether the scores fall into the range for strengths or challenges. Any attempt to enter a score that is out of range will result in an error message, allowing you to correct the error immediately.

Enter Visual and Auditory Screening Data *See Screen Shot 9 - Visual and Auditory & Reading of Single Words Data Entry.*

1. Go to **Enter Client Information** on the upper tool bar or select the **Profile** button from the lower tool bar.
2. **Select the participant** from the Client picklist.
3. **Click on the V&A** (Visual and Auditory Function Screening) button on the Client window lower tool bar.
4. **Click on Add** or **Edit**.
5. **Enter data** in the appropriate fields. You may use the <Tab> key or the mouse to move through the fields.
6. **Click on Save**.

Enter Reading of Single Words

- The Visual and Auditory Functions Screenings and Reading of Single Words are listed on the same software screen.
- Entering the Reading of Single Words Total Score will generate a Reading Instructional Level in the client's Individual Report. This score can be used to compare the participant's decoding skills with their comprehension skills from other standardized tests. The Instructional Level can also be used as a reading level for selection of appropriate instructional reading materials.
- The Reading of Single Words can be used for pre-testing, instruction, and post-testing.



Screen Shot 9 - Visual and Auditory & Reading of Single Words Screening Data Entry

The Extended Screening

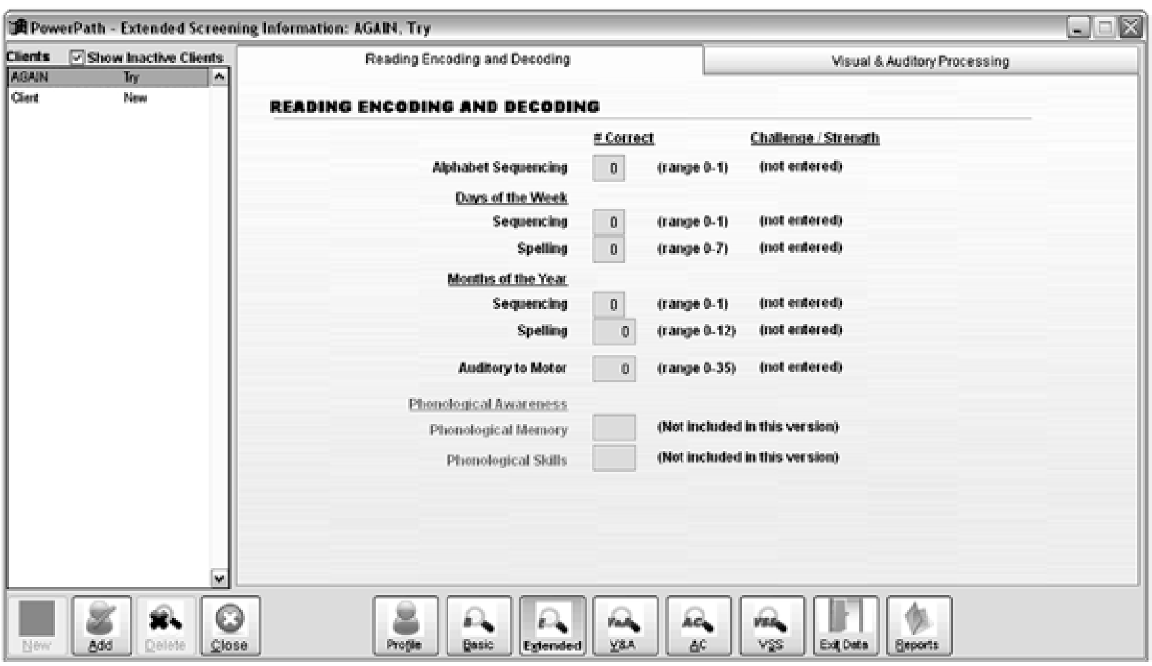
PowerPath's Extended Screening includes the Information Processing Screenings listed on the inside of the Personal Profile Folder. The Extended Screening Plates and the Extended Screening Response Booklet correspond with these screenings. Scores for the Extended Screenings are recorded on the inside of the Personal Profile Folder, making it easy to enter screening scores into the software.

The Extended Screening data entry window has two pages of data to be entered:

- Reading Encoding and Decoding including Alphabet, Days of the Week, Months of the Year, and Assessment of Phonological Skills
- Visual Processing Screenings including the Motor Free Test, Eye-Hand Motor Coordination, and Visual Motor Integration
- Auditory Processing Screenings including Auditory Comprehension, Random Numbers, and Words in Context

Enter Extended Screening Data *See Screen Shot 10 - Extended Screening Data Entry*

1. Go to **Enter Client Information** on the Client upper tool bar or select the **Profile** button from the lower tool bar.
2. **Select** the participant from the Client picklist.
3. **Click on Extended Screening** button on the Client window lower tool bar.
4. **Click on Add** or **Edit**.
5. **Enter data in appropriate fields**. Use either <Tab> key or the mouse to move through the fields.
6. **Click on Save**.



Screen Shot 10 - Extended Screening Data Entry

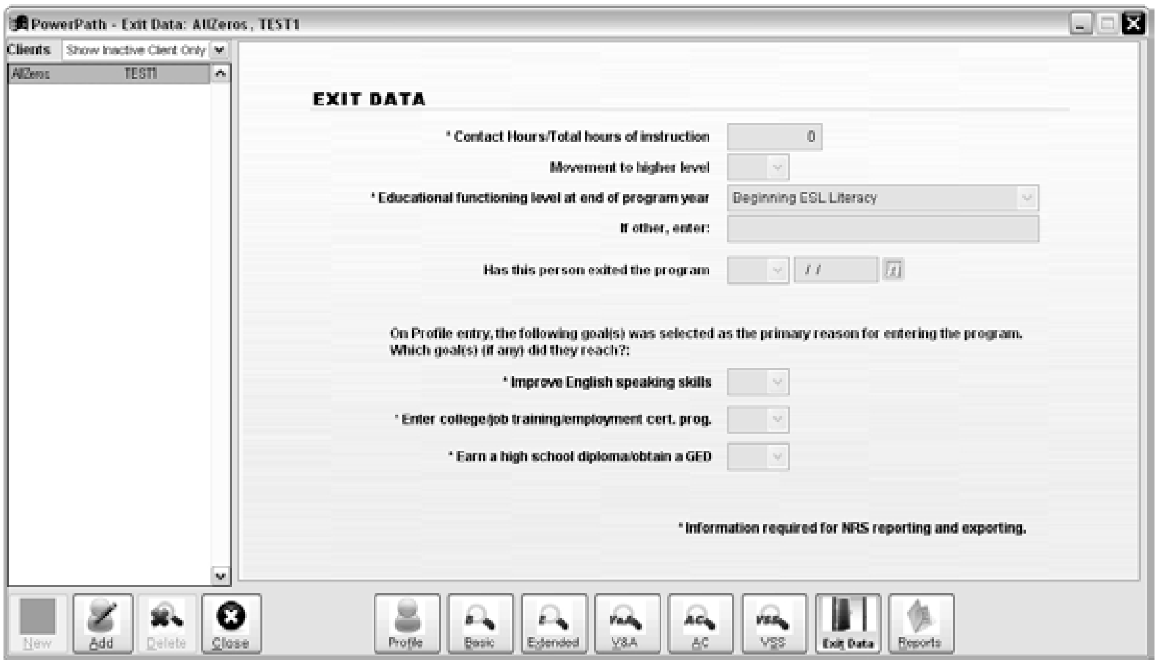
How and when do I enter Exit Data?

See Screen Shot 11 - Exit Data Entry

Exit information can be collected on the front of the Personal Profile Folder when:

1. A participant leaves the program.
2. At the end of the program year, semester, or fiscal year.
3. Exit data is first documented in the pink shaded area on the bottom of the Personal Profile Folder. Exit Data can be entered into the software system at any time.

> **NOTE**
> - The Exit Data section of the Service Summary reports and related outcomes will only be accurate and complete after all exit data is entered.



Screen Shot 11 - Exit Data Entry

What kind of Reports are available?

When participant Personal Profile data, screening results, and Exit Data have been entered, PowerPath's software will produce two types of reports:

1. Individual Reports
2. Administrative Reports

What are my options for Individual Reports?

When participant Personal Profile data and screening results have been entered, PowerPath's software will produce an array of Individual Reports. Each report is customized for the participant based upon their screening results and is personalized with the participant's name. The content of the report is based upon a decision tree using the screening data entered into the software. If the participant scores in the 'strength' range, the base report includes a predetermined analysis and set of adaptations and strategies for anyone scoring a 'strength' in that screening area. Similarly, if the participant scores in the 'challenge' range, the report will include the base predetermined analysis and set of adaptations and strategies for anyone scoring a 'challenge' in that screening area.

After a participant's Personal Profile information and screening results have been entered into the software, Individual Reports can be created, viewed and edited, and printed. All sections of the Individual Report may be printed at once or the report can be printed by individual sections.

The sections of the Individual Report can include:

Individual Report

- Diagnostic Screening Summary
- Service Adaptations and Strategies
- Basic Screenings Analysis, Adaptations and Strategies
- Extended Screenings Analysis, Adaptations and Strategies, if participant results have been entered
- General Workplace Adaptations and Strategies
- Partnership Contract
- Referral Form(s), if needed for challenges identified in the screening for visual and/or auditory functions

Including Personal Profile information in the Individual Report is an option. The Personal Profile outlines personal and demographic from the personal interview. This is often considered confidential information and will only be included as part of the report if this option is selected.

NOTE

- Before printing an Individual Report, you can review and edit the report to include your own comments and observations, and/or to delete comments or adaptations from the base report.
- Personal Profile Information will only be included as part of the report if the option is selected.
- Reports can be printed as PDFs for previewing, saving or sharing the report.
- The software automatically checks for any required data that is missing prior to printing.
- ***Whenever a participant's information is changed, all reports MUST be rebuilt to incorporate these changes.*** **The Rebuild function can also be used to reset the base Individual Report information, eliminating any edits made to the report.**

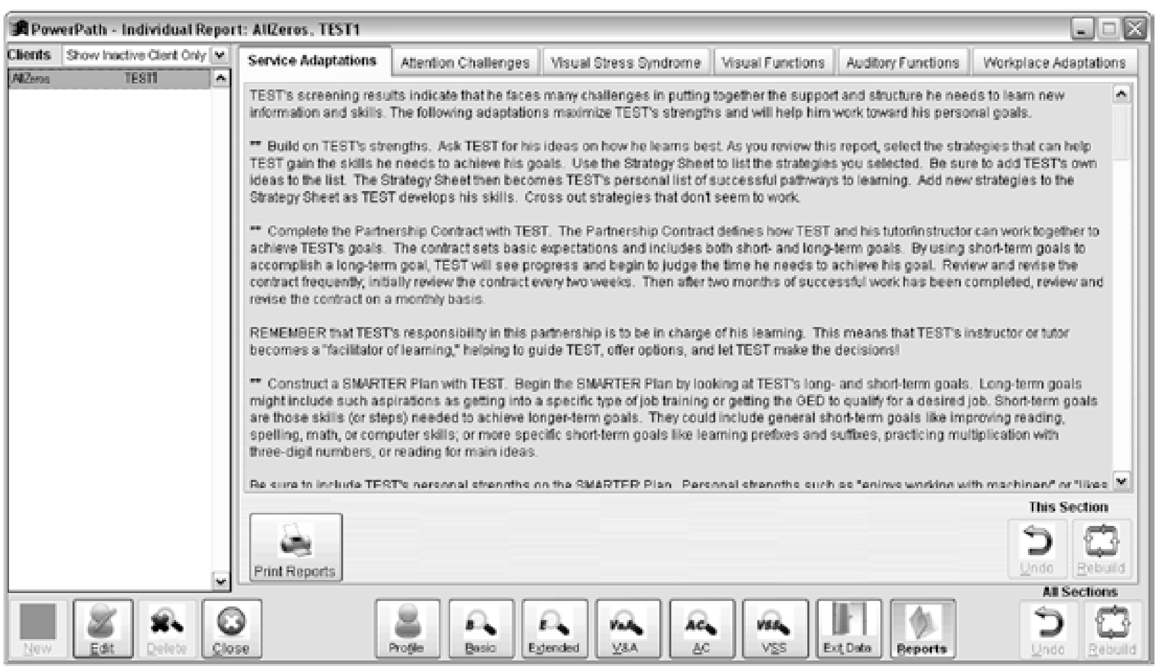
The Basic Individual Report

Analysis, Adaptations and Strategies are provided for each area of the Basic Screenings and are customized based upon the results of each individual screening results, including

- ✓ Attention Challenges Analysis, Adaptations and Strategies
- ✓ Visual Stress Syndrome Analysis, Adaptations and Strategies
- ✓ Visual Functions Analysis, Adaptations and Strategies
- ✓ Auditory Functions Analysis, Adaptations and Strategies

In addition, the Individual Report includes: *See Screen Shot 12 - Basic Individual Report*

- The Diagnostic Screening Summary lists all of the Basic Screening results for screenings that have had data entered. As part of the Diagnostic Screening Summary, there will be a calculated reporting of the participant's Reading Instructional Level, based on the Total Correct score on the Reading of Single Words. The Reading of Single Words score is used to provide an instructional level to select instructional materials, track a participant's progress, and to compare with comprehension assessments to better define underlying reading challenges.
- Service Adaptations and Strategies offer a set of emotional, structural, and social support adaptations and strategies. The adaptations and strategies listed in the Service Adaptations and Strategies are consistent for all participants. You may edit the Service Adaptations and Strategies and offer an explanation to the participant of the core elements in the PowerPath System.
  In addition, other research-based strategies are listed as strategies that can lead to greater persistence, participant-driven services, building personal advocacy skills, and specific strategies in supports of brain-based learning.
- The Basic Screenings Analysis, Adaptations and Strategies for each of the screening areas explain the screening, interprets the participant's screening results, and recommends adaptations and strategies based upon the participant's strengths and challenges in each area.
  - ✓ Attention Challenges Analysis, Adaptations and Strategies
  - ✓ Visual Stress Syndrome Analysis, Adaptations and Strategies
  - ✓ Visual and Auditory Functions Analysis, Adaptations and Strategies



Screen Shot 12 - Basic Individual Report Screen

- General Workplace Adaptations and Strategies offer a consistent set of emotional, structural, and social support adaptations and strategies for all participants. Workplace Adaptations and Strategies identify research-based components that lead to greater persistence, participant-driven services, personal advocacy, and supports needed for ensuring employment success. Not all adapatations or strategies will be relevant to each participant entering or sustaining employment. This section should be carefully reviewed prior to printing to edit out adaptations or strategies that are not appropriate for a given participant.
- A Partnership Contract is provided to help the facilitator and participant set mutual expectations about working together to achieve the participant's long-term and short-term goals. The contract is an important part of the PowerPath System as it sets intentions and delineates many important aspects of persistence that are key for the participant to be successful.
- Visual Function and/or Auditory Function Referral Form(s), if needed, are generated if screening results(s) indicate a challenge in any of the areas of visual functions or auditory functions.

The Extended Individual Report
The extended screening report contains additional valuable sections based upon the results of the Extended Information Processing Screening scores.

Extended Individual Reports include all elements of the Basic Individual Report plus:

- Reading Encoding and Decoding Analysis, Adaptations and Strategies
- Visual Processing Analysis, Adaptations and Strategies
- Auditory Processing Analysis, Adaptations and Strategies

How do I print Individual Reports?

After entering Personal Profile information and screening results for a participant, creating, reviewing and editing, then printing Individual Reports is easy. The contents of the Individual Report can be selected by checking on or off each of the report sections. *See Screen Shot 13 - Print Individual Reports.*

Print Individual Reports

1. Go to **Print Client Reports** from the Client button on the upper tool bar or select the **Reports** button from the lower tool bar.
2. **Select the participant** from the Client picklist. *This picklist may be refined by choosing to show only active or inactive clients or by typing the first letter of the last name.*
3. **Review and/or Edit** report sections. ***If changes have been made to the report, be sure to select Save.*** If you choose to use the base report and not make any edits, you can choose either **Print Reports** or **Close**.
4. **Click on Print Reports** button.
5. **Choose desired sections** to print.
6. **Choose Print, Preview* or Close**

* Selecting <Preview> will always print a PDF to the screen. The PDF can be printed, can be attached to an e-mail to send to another person/location, and can be saved on the desktop or in another specified location.

Screen Shot 13 - Print Individual Reports Screen

What are my options for Administrative Reports?

There are four main Administrative Reports:

1. Service Summary
2. List of Clients in the System
3. Client Data Entered
4. List of Service Sites/Groups in System

Service Summary

When information is power, by far the most powerful administrative tool is the Service Summary. The Service Summary is an aggregate report of all of the participants' data, including Personal Profile data, Screening data, and Exit data. One key feature of the Service Summary is that it is possible to combine participant information from multiple sites in order to print just one combined data report. *More information will be given in the section on Multiple Service Sites.*

The Service Summary can be used to

- Help organizations provide participant data required for program and funding reports
- Help prepare reports for advisory or governing boards, or for strategic planning initiatives
- Review participant needs to better align resources to needs
- Develop grant proposals and funding requests

Some key features of the Service Summary

- ✓ At the top of each report page is the total number of participants (N=) on which the data are based.
- ✓ The Service Summary data can be calculated in percentages or frequencies - i.e., raw numbers.
- ✓ The report can be constructed for specific time periods (e.g., January 1, 2011 – March 31, 2011).
- ✓ Information in the report can reflect all participants in the system or can include *only* the participants who meet the U.S. Department of Education's criteria for being a valid 'student' in an Adult Basic Education program (i.e., completing a minimum of 12 contact hours). When Total Contact Hours have been compiled and entered into the PowerPath software as part of the Exit Data, the option of selecting the 12+ hours will be able to be used to select only participants that meet the U.S. Department of Education's criteria.
- ✓ A separate Service Summary report can be created for each program site, any selected combination of sites, or for all program sites. When printing the Service Summary, a listing of all selected program sites will be displayed.

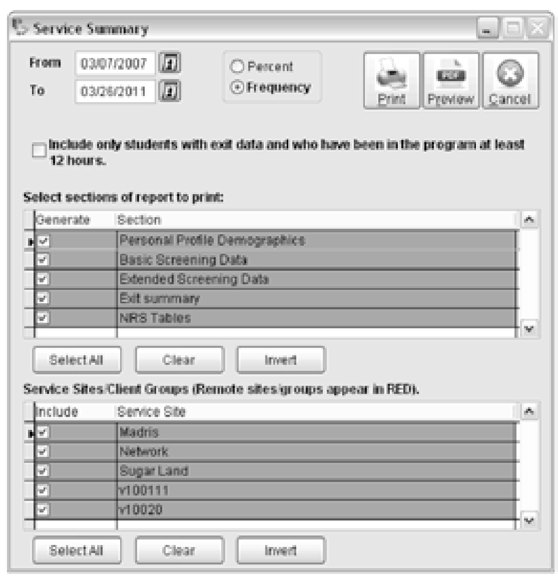
The aggregate data found in the Service Summary includes:

- ✓ Personal Profile Demographics
- ✓ Diagnostic Screening Summary listing aggregate data for all persons including:
  - -- Attention Challenges Levels Summary
  - -- Visual Stress Syndrome Challenges Levels Summary
  - -- Visual Function and Auditory Function Screening Summary
  - -- Reading of Single Words Levels Screening Results
  - -- Information Processing Screenings with Degree of Learning Difficulty Levels Summary (when Extended Screening results have been entered into the software)
- ✓ Participant Exit Data Summary (when Exit Data has been entered into the software)

Printing the Service Summary *See Screen Shot 14 - Service Summary Print Screen*

1. Go to **Administrative** menu and select **Service Summary** on the upper menu or click on the **Service Summary** button on the lower tool bar.
2. **Enter 'From' and 'To' Dates** for report. Enter the dates you would like the report to reflect by entering beginning dates and ending dates in fields marked From and To. For example, if a report reflecting all of the participants screened in my program year (July 1 - June 30), you would enter 7/1/11 to 6/30/12. The report will be generated for participants with an intake date falling between the dates entered.
3. **Select Percent or Frequency.** The Service Summary can be printed either in percentages (i.e., of the participants entered into the system for those dates) or frequencies (i.e., in raw numbers).
4. **Choose** whether you would like the information to reflect everyone in the system or to only include participants for whom Exit Data have been entered and who meet the US Department of Education's criteria for Adult Basic Education either by completing 12 hours (as entered into the Total Hours field of the exit data) or by completing the personal objectives identified in the exit data.
5. **Select the Sections** of the report you would like to include.
6. **Select the Groups/Sites** you would like included. A Service Summary can be generated and printed for one or all of the sites listed in the Print window and/or in the Maintain Service Sites/Groups Data option from the Tools menu.

   All sites are selected by default. You may choose to have all sites included or choose a site or sites from the drop-down list. Remote Sites are in red. This external/remote site information may be imported into the PowerPath software using the Import Data for Service Summary feature on the Tools Menu.
7. **Select Print or Preview** (PDF).
8. **Review your selections**.
9. **Click OK**.



Screen Shot 14 - Service Summary Print Screen

NOTE

- The Service Summary beginning report date ‘From’, automatically populates with the earliest client intake date.
- **All sites must be working with the same version of the software for the remote site/group process to function properly.** If your sites/groups are using older versions of our software not compatible with this feature, contact us for information on updating your PowerPath Software.
- Each imported site/group name must be different from existing or other imported sites. Using duplicate site/group names will result in losing participant data.

How do I use the Remote Sites feature when printing the Service Summary?

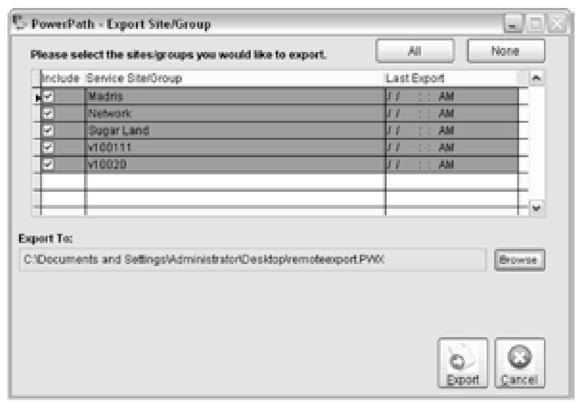
The Remote Sites option will help an organization create administrative reports for all or for only selected sites/groups. Using the Remote Site option *will only transfer summary information*. The remote site option *will not transfer participant specific information*. Confidentiality will be maintained for all participants. Using the Remote Site options will not allow the printing of an Individual Report for a participant entered from a different site. There are other features in the software that will allow an individual from one site to be transferred to another site (see page 18).

To Export Remote Site/Group Information

See Screen Shot 15 -Export Remote Site/Group Screen

1. **Go to Tools** in the upper menu.
2. **Click on Export Site/Group Information**.
3. **Select the Sites/Groups** with data you would like to export.
4. **Browse** to where you would like to save the exported data (defaults to Desktop).

   Name the file -- you may want to include the site name and the date of backup in the title (i.e., SEAE8292011 - which stands for Southeast Adult Education August 29, 2011). Be sure that the name of this file is different from other sites/groups Export files.
5. **Click on Export**.
6. When complete, **click on Close.**

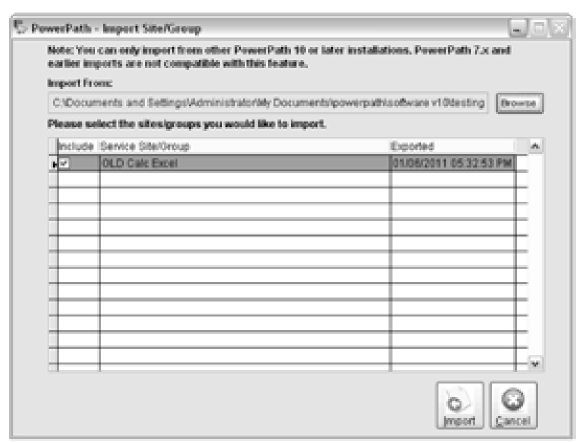


Screen Shot 15 - Export Remote Site/Group Screen

To import remote site information:

See Screen Shot 16 - Import Remote Site/Group Screen

1. **Go to Tools** in the upper menu.
2. **Click on Import Remote Site/ Group Information.**
3. **Browse** to the location of the desired exported data file
4. **Select the Sites/Groups** data you want to import.
5. **Click on Import** Remote Site Information.
6. When receiving is complete, **click on Close**.

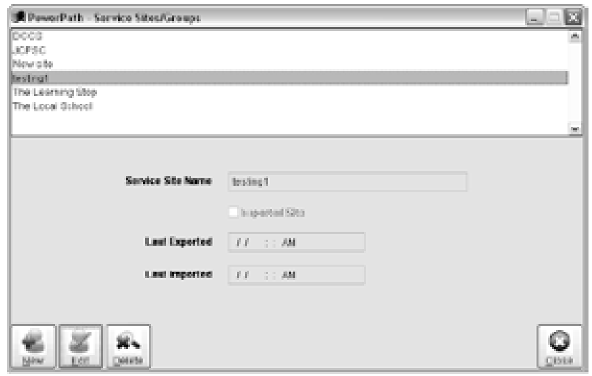


Screen Shot 16 - Import Remote Site/Group Screen

To manage remote site information:

See Screen Shot 17 - Maintain Remote Site/Groups

1. **Go to Tools** in the upper menu.
2. **Click on Maintain** Service Sites/Groups.
3. **Review** the list of sites and delete sites no longer needed.
   The imported/exported site/group information displays the date it was last imported or exported for easier identification.
4. **Repeat**, as needed.



Screen Shot 17 - Maintain Remote Sites/Groups

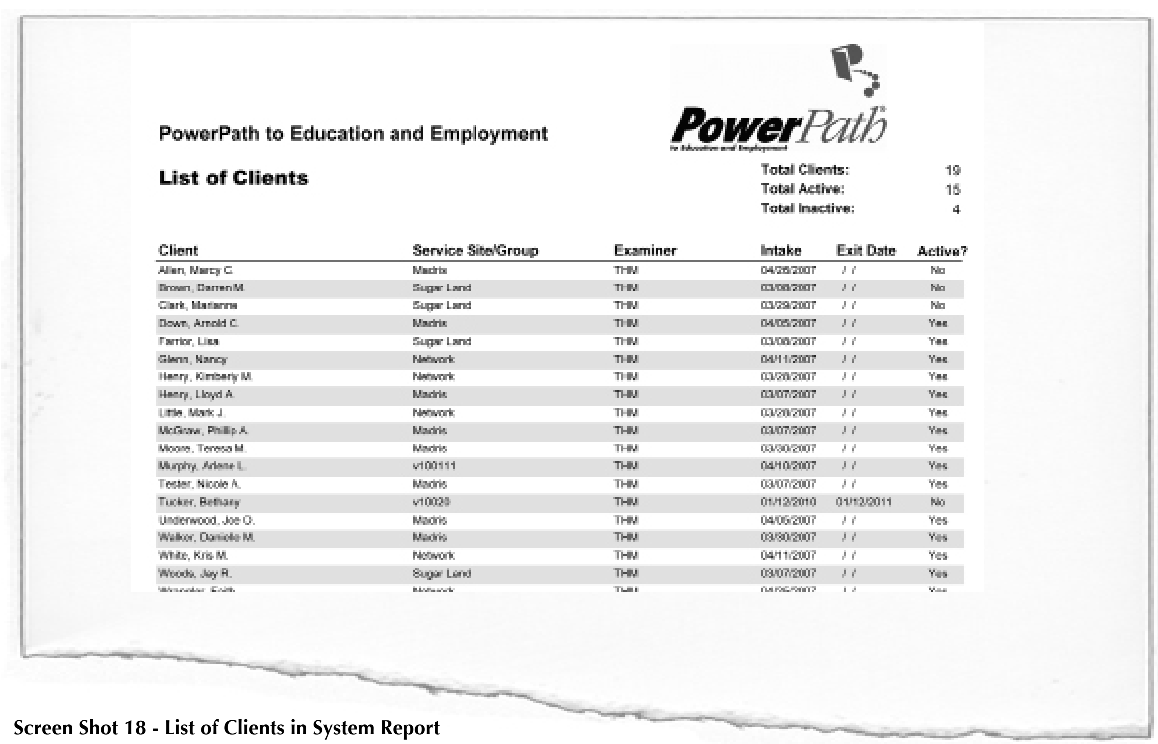
Other Administrative Reports

In addition, the software provides your program with administrative reports that:

- List participants you have entered into the software
- Profile participants by aggregating Personal Profile information and screening results
- Track participant outcomes
- Combine participant information from multiple sites

List of Clients in the System *See Screen Shot 18 - List of Clients in System Report*

This report provides an overview of all clients in the system. The List of Clients report lists client name, service site/group, examiner, intake date, exit data, and whether the client shown as active or inactive status.



PowerPath to Education and Employment

PowerPath to Education and Employment

List of Clients

Total Clients: 19
Total Active: 15
Total Inactive: 4

Client	Service Site/Group	Examiner	Intake	Exit Date	Active?
Allen, Marcy C.	Madris	THM	04/26/2007	/ /	No
Brown, Darren M.	Sugar Land	THM	03/08/2007	/ /	No
Clark, Marianne	Sugar Land	THM	03/29/2007	/ /	No
Down, Arnold C.	Madris	THM	04/05/2007	/ /	Yes
Farrior, Lisa	Sugar Land	THM	03/08/2007	/ /	Yes
Glenn, Nancy	Network	THM	04/11/2007	/ /	Yes
Henry, Kimberly M.	Network	THM	03/28/2007	/ /	Yes
Henry, Lloyd A.	Madris	THM	03/07/2007	/ /	Yes
Little, Mark J.	Network	THM	03/28/2007	/ /	Yes
McGraw, Phillip A.	Madris	THM	03/07/2007	/ /	Yes
Moore, Teresa M.	Madris	THM	03/30/2007	/ /	Yes
Murphy, Arlene L.	v100111	THM	04/10/2007	/ /	Yes
Tester, Nicole A.	Madris	THM	03/07/2007	/ /	Yes
Tucker, Bethany	v10020	THM	01/12/2010	01/12/2011	No
Underwood, Joe O.	Madris	THM	04/05/2007	/ /	Yes
Walker, Danielle M.	Madris	THM	03/30/2007	/ /	Yes
White, Kris M.	Network	THM	04/11/2007	/ /	Yes
Woods, Jay R.	Sugar Land	THM	03/07/2007	/ /	Yes

Screen Shot 18 - List of Clients in System Report

Client Data Entered *See Screen Shot 19 - Client Data Entered Report*

This report provides an overview of the categories of screening data have been entered for all clients. It will allow you to identify what type of screening data has been entered for each client, enabling you to find out if any client is missing any desired screening data.

PowerPath to Education and Employment

Client Data Report

Intake dates from 03/07/2007 through 04/27/2011.

Client	Service Site/Group	VF	AF	Extended	AC	VSS	Exit
Allen, Marcy C.	Madris	X	X		X	X	
Brown, Darren M.	Sugar Land	X	X		X	X	
Clark, Marianne	Sugar Land	X	X		X	X	
Down, Arnold C.	Madris	X	X		X	X	
Farrior, Lisa	Sugar Land	X	X		X	X	
Glenn, Nancy	Network	X	X		X	X	
Henry, Kimberly M.	Network	X	X		X	X	
Henry, Lloyd A.	Madris	X	X		X	X	
Little, Mark J.	Network	X	X		X	X	
McGraw, Phillip A.	Madris	X	X		X	X	
Moore, Teresa M.	Madris	X	X		X	X	
Murphy, Arlene L.	v100111	X	X		X	X	
Tester, Nicole A.	Madris	X	X		X	X	
Tucker, Bethany	v10020	X	X	X	X	X	X
Underwood, Joe O.	Madris	X	X		X	X	
Walker, Danielle M.	Madris	X	X		X	X	

Screen Shot 19 - Client Data Entered Report

List of Service Sites/Groups *See Screen Shot 20 - List of Service Sites/Groups Report*

This report lists all of the sites/groups and indicates if the site/group has been imported or exported and when, if applicable. It also lists the number of clients that were entered locally, how many sites/groups were imported, and total number of clients.

PowerPath to Education and Employment

Service Sites/Groups

Service Site/Group	Imported?	Last Import	Last Export	# Of Clients
Madris	No			8
Network	No			5
Sugar Land	No			4
v100111	No			1
v10020	No			1

Total Clients in Local Service Sites/Groups:	19
Total Clients in Imported Service Sites/Groups:	0
Total Clients:	19

Screen Shot 20 - List of Service Sites/Groups Report

Can I incorporate participant and/or site information from a remote site into my existing PowerPath database?

The Remote Sites option can be used for more than printing a Service Summary. Using Incorporate Remote Site/Group/Participant Information into Current Database from the upper Tools menu will enable you to incorporate selected information into an existing or new client database.

This data integration feature can be used to create a "main database", i.e., one PC that holds all site/group data, incorporating data gathered from other locations. With this feature, data exported using the remote sites feature can also be incorporated from one or more external remote sites/groups into a main database. For example,if a program has a system of laptops in the field and desktop units in the program office, the site/group data can be moved from ech laptop to the desktop unit to create one master database for all or selected sites.

To move only selected participants from one database to another, you may create a separate site/group for this information. A new site/group name can be created for the records that are being moved from one PowerPath software database to another. This will allows the movement of specific participant data or partial group information into an existing database. Once this information is transferred, this site name may then be edited in order to include this participant information in the desired site/group at the new location.

Incorporated data will function just the same as if they had been entered manually into the software at its new location. For example, when using this incorporate remote site/group/participant option, you will be able to print Individual Reports for a participant that was entered at a different site and transferred into the existing client data base.

Incorporate Remote Site/Group Information into Current Database:

1. **Go to Tools** in the upper menu.
2. **Click on Incorporate Remote Site/Group/Participant Information** into Current Database.
3. **Select the Sites/Groups** data you want to import from the drop-down list of available files.
4. **Browse** to the desired Data Export file.
5. **Click on Import**.
6. When receiving is complete, **click on Close**.

Can I export my raw data to another program for analysis?

PowerPath has added a new tool for analyzing a program's raw data by exporting it to Microsoft Excel or Access. This report includes all screening data information and more. (Since this report must be calculated each time it is run, the report cannot be permanently formatted.)

To Export Raw PowerPath Data:

1. **Go to Tools** in the upper menu.
2. **Click on Raw Data Export** to Excel or Access.
3. **Select the Dates** of service to be covered.
4. **Select the Sites/Groups** desired from the drop-down list.
5. **Choose output Format** -- Access (MBD) or Excel (CSV).
6. **Browse** to where you would like to save the exported data.
7. **Name the file --** you may want to include the date of export in the title (i.e., PPrawdata8292009).
8. **Click on Export**.
9. When copying is complete, **click on Close**.

How do I backup my data?
How do I export my data for Technical Support?

PowerPath has a tool for backing up PowerPath client data manually on demand. This feature will allow saving backup data in a different location, making data more secure. This feature will also provide helpful tech support information in case of any future software issues you may encounter.

How do I compile logs for Technical Support?

Occasionally, you may need to speak to the TLP Group / PowerPath Software Technical Assistance about a software problem. The software's error log feature tracks the specific details about a problem and can provide a lot of helpful information to our tech support team. If you are experiencing difficulty, please take a minute to generate the software error logs and provide the information to tech support.

<u>To compile Error Logs:</u>

1. **Go to Tools**.
2. **Click on <u>Compile Logs for Technical Support</u>**.
3. **Browse** to where you would like to save the error log data.
4. **Name the file** -- you may want to include the date of export in the title (i.e., location8292009).
5. **Click on Compile**.
6. When compiling is complete, **click on Close**.
   If there are no recorded errors, no report will be created.

Get us the Error Log Report by emailing the file to techsupport@powerpath.com. Please include a brief description of your software issue and your contact information.

Conclusion

PowerPath's software provides a variety of useful reports both for participants and organizations.

- Our personalized Individual Reports provide lots of customized strategies and helpful analysis for each participant. Based upon a program's experience and knowledge of each participant, Individual Reports can be also be edited to include the screener's observations during the screening process, to change or edit recommended strategies, or to add to the list of recommended adaptations and strategies.
- The Service Summary is a powerful administrative tool for tracking and reporting client demographics and outcomes. This report can also be customized to suit each program's needs.

In Part 5: Building the Partnership and Setting the Path, there will be a walk through Step 4 – Building Insight and Partnership and Step 5 – Setting the Path for Success.

These two steps use the Individual Reports as a means to build the participants' knowledge of themselves and select adaptations and strategies for overcoming their learning challenges. The participant will also learn the steps of SMARTER used to set goals, place the knowledge or skills in a context of related known mental models, practice adaptations and strategies, manage tasks and time, and build in a self evaluation. The participant can select specific skills, strategies, and processes to continue their growth as a successful learner or worker.