FIRST STEPS DATA SYSTEM
Beginning-of-Year Checklist

<u>At the start of each new program year, there are steps each local First Steps partnership needs to follow in order to get their partnership strategies registered and prepared for data entry.</u>

ADMIN FUNCTIONS
- Authorize Programs
- Register Vendors
- Register Programs
- Projected to Serve
- View Registered Programs
- View Registered Logins
- Approve Providers

These steps include:
1. Request new logins to the data system, if necessary
2. Register vendors
3. Register programs
4. Confirm your vendor and program registration
5. Enter Projected to Serve numbers
6. Roll over clients from the prior year (Cases Data)

All of these steps except rolling over clients take place under "ADMIN FUNCTIONS". Only staff with "administrator" level logins can make changes to this area of the data system, usually the partnership director.

1. **Request new logins**. Has your partnership added a new strategy, or had a change in partnership or vendor staff? If so, then you need to request new logins to the First Steps Data System. Each partnership should have at least one administrator level login, and at least one vendor level login per strategy for every staff person that is going to enter data in either the Cases Data, Outputs Data, or Child Care Data sections of the system. Anyone who is going to enter data for a particular strategy is going to need a separate vendor login for each strategy; for example, if a partnership staff member is going to enter data for both in-house scholarships and Countdown to Kindergarten, that staff member will need both a 7032 vendor login and a 4062 vendor login. Note with vendor level logins, you will need to identify a vendor number (1,2,3,etc.). Multiple staff may share a vendor number, if they share the same caseload. To request a new login, download the Data Use Agreement from the "Forms" tab of the data system and mail the completed form to the address provided. Go to "View Registered Logins" to see what administrator and vendor logins and vendor numbers have already been registered for your partnership. **Don't forget to discontinue logins when staff leave employment! This is an important data security issue - contact Carla Sadlier to discontinue logins.**

2. **Register your vendors for the new program year.** Go to "Register Vendors" and add the vendor logins your partnership staff and vendor staff will be using for the current program year. If you don't see the vendor login you need under "Existing Vendors" or the "Available Vendors" drop-down, the issue is either 1. This is a new strategy or new staff member, so go back to Step 1; or 2. The program strategy you are trying to register is not authorized for the current year for your partnership. This can happen when a strategy is added mid-year, or there was a mistake loading this year's partnership strategies. If this is the case, contact Betty Gardiner to resolve.

3. **Register your programs for the new program year.** Go to "Register Programs" and register each program for which you will be entering either Cases Data, Outputs Data, or Child Care Data. It is during this step that you will connect each vendor number to a particular program; therefore, if you have more than one vendor number for a particular program, you will need to re-register the program as many times as you have vendor numbers. For example, a partnership PAT strategy that employs two parent educators, each with their own vendor login, would need to register two PAT programs for their partnership. The same rule applies to partnerships that contract with multiple vendors within a strategy.

4. **Confirm your vendor and program registration.** Steps 1-3 can be complicated … check your work by going to "View Registered Programs" and "View Registered Logins" to make sure the logins you need are active for the new program year. If not, go back to Steps 1, 2, and/or 3.

5. **Enter Projected to Serve (PTS) numbers for EACH strategy that the partnership is operating for the current year, including strategies exempt from data entry such as NFP.** PTS numbers should be the same as what was proposed in the partnership's Grant Application; if not, send a justification to your SCFS Program Officer explaining the difference. Once entered, these numbers cannot be changed. During the grant application review process, PTS numbers will be compared to actual numbers served to determine if the partnership served 75% or higher of projected clients.

6. **Roll Over Continuing Clients.** Within the Cases Data, you have the option of rolling over cases from one year to the next. To roll over cases, go into the cases data for the previous fiscal year, click on the "roll over cases" button, select which cases(s) and which family members within each case to roll over, and click the gray button to save. If you accidentally roll over a case, contact Betty Gardiner to have the case removed. Note only basic case information rolls over. Risk factors, scholarship data, interventions and referrals do NOT roll over and must be re-entered.

QUESTION: ***Where should I enter my data?***
Answer: ***It depends …***

Cases Data	Home Visitation (except NFP), Family Literacy, Countdown to Kindergarten, Scholarships, Early Identification and Referral, and other programs where children, adults, and/or families are served in some type of direct service over a period of time, such as parent training, other family literacy, Fatherhood, etc.
Outputs Data	Imagination Library and other strategies where there is not a direct in-person service provided to children, adults, or families over a period of time, or when it is impractical to capture individual child/adult names and birthdates. The exception is Child Care Training, which enters Outputs Data. Early Identification and Referral strategies also enter referral source contacts and materials distributed in Outputs Data.
Child Care Data	Child Care Quality Enhancement, Quality Counts
Exempt from FS Data System	Nurse-Family Partnership; Early Head Start

Deadline for registering programs and entering Projected to Serve numbers: SEPTEMBER 1
Quarterly data entry deadlines (for the previous quarter): OCT 31, JAN 31, APRIL 30, JULY 31
DATA SYSTEM QUESTIONS: Contact Betty Gardiner at SC First Steps, bgardiner@scfirststeps.org, 803-734-0219
LOGIN PASSWORD QUESTIONS: Contact Carla Sadlier, carla.sadlier@rfa.sc.gov, 803-898-9545

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