

PLL DASHBOARD USER MANUAL

A screenshot of the PLL Dashboard website. The top navigation bar is blue with white text for 'Home', 'About', 'Working with PLL', and 'Outcomes'. Below the navigation bar is a large image of four women sitting around a table, engaged in a conversation. The text 'An Evidence-Based Family Treatment Model' is overlaid on the image, along with a blue button that says 'Let's Talk'.

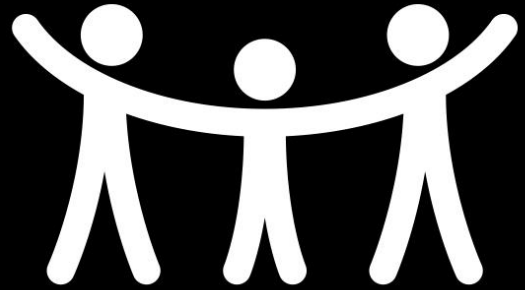
Home About Working with PLL Outcomes

**An Evidence-Based
Family Treatment Model**

Let's Talk

www.gopll.com

PLL



**EVIDENCE-BASED
FAMILY TREATMENT MODEL**

PLL Dashboard User Manual

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PLL Dashboard User Responsibilities and Obligations

In general the following terms and conditions apply to all users of the PLL Dashboard.

All users understand and agree that PLL is granting the user access to the Dashboard for use in the official scope and course of their duties and responsibilities. It is also understood that any negligent or intentional violation of patient confidentiality using information acquired through the Dashboard will be cause for immediate termination of all system privileges. Furthermore, PLL shall take appropriate action to comply with any and all applicable federal, state and local laws and regulations regarding such a violation including, but not limited to, the Health Insurance Portability and Accountability Act of 1996 (“HIPAA”).

The Terms of Use for the PLL Dashboard are as follows:

- All users agree to use their unique username and password only in the official course and scope of their PLL duties and responsibilities.
- All users agree to use only their own username and will not share their username and password with others.
- All users will keep strictly confidential all information, in any format, which they have access to as an authorized user of the Dashboard.
- No user will copy all or part of the database, software, programming, or Dashboard without prior written consent from PLL.
- All users agree to comply with the applicable provisions of HIPAA and PLL policies and procedures related to HIPAA, and information protection.

All users, prior to gaining dashboard access, will sign a User Confidentiality Agreement indicating their agreement to the Terms of Use listed above.

Foreword

As part of your Parenting with Love and Limits (PLL) programming, each Center of Excellence has access to the PLL Dashboard. The dashboard was designed to capture client and site data in order to provide 'real time' results from the work performed with families using PLL.

This manual will give you the direction needed to take advantage of all the features and benefits that the PLL Dashboard provides. This manual is designed to give you an understanding of how to enter your data (inputs) and instruct you on the use of the various charts and reports (outputs).

By taking advantage of the use of the PLL Dashboard, you will be able to provide a higher quality of service to your clients and help enable your organization to produce the best possible outcomes from the use of PLL.

As you begin using the PLL Dashboard, please direct any questions to your PLL Clinical Consultant.

I. Logging In

In order to access the PLL Dashboard, you must first log in to the system. To log in, you will use the following information:

- Network ID for your site
- Dashboard Username
- Your Password

To log in, complete the following steps:

Step 1: Go to the PLL website at www.gopll.com.

Step 2: On the top right corner, click “Login”.

Step 3: Enter your username and password and click the blue Login button. This will take you to your Main Dashboard Page

II. Main Dashboard Page

A. Dashboard Navigation Bar

On the main dashboard page you will see a grey Dashboard Navigation Bar at the top of the page.



When logged into the PLL Dashboard, you always have access to this Dashboard navigation bar. The navigation bar displays the names of the pages that are available to you. Based on your assigned security level, you will have between 2 and 10 pages available. To navigate to each page, click on the name of the desired page.

i. Dashboard

This is the main dashboard page, clicking this link when you navigate to another page will bring you back to your main dashboard page

ii. Cohort Tracking

This is the page where you will create new cohorts. A cohort must be created before you can enter new client data.

iii. Client Information

This page allows you to enter new clients as well as view all the clients being served.

iv. Assessments

This page allows you to see all the assessments are currently in the dashboard for a particular client.

v. Relapse Prevention

This page allows you to see when callbacks and/or tune-ups have occurred or are due

vi. Reports

This page allows you to view, print, or save to your computer various reports indicating the progress of your PLL program

B. Document Library

The Document Library holds numerous documents that are utilized in the implementation of PLL. The title of each section indicates the type of documents that are within the folder. Each document can be downloaded and saved to the user's computer or printed directly from the Document Library.

C. Site Name, License Period, Contract Type, # New Families Served:

The name of your site

The current License Period Displayed

Contract Type

The Number of New Families Served so far in the current license period

D. Select License period drop-down menu

Use the drop-down menu that shows “Select License Period” and select the period you would like to view. You will have the option to view a specific period, or all periods combined. The last selected license period will always be displayed in the upper left section of the dashboard page. *(For sites that are in their first license period of operation, this selection will not be available until a second license period is reached.)* Once you have selected the License Period, click “Change” and the page will update with information for the selected period.

E. Additional Dashboard Pages

You have the ability to navigate to five additional dashboard pages by clicking the applicable item listed immediately below the License Period selection menu.

Additional dashboard pages include:

i. View the PLL Logic Model

When selecting the [View the PLL Logic Model](#) option from the dashboard page, a new page will open on your Internet browser to display a pdf of the PLL Logic Model. To return to the dashboard from the logic model close the webpage that was opened to view the logic model. This should revert you back to your main dashboard page.

ii. Demographics

To view the demographics dashboard, click the dashboard link titled “[Demographics](#).” This page displays charts identifying the demographic information for clients that were Successful Completers and Dropouts. *(Clients who have a status of Referral Only or Administrative Discharge are NOT charted in the demographic charts.)*

Once on the demographics page, you will find the ability to select the License Period and/or Client Type/Sub-Type.

The demographics page contains seven primary charts. Those charts display a pie chart for each of the following demographic categories:

1. Type of Offense
2. Ethnicity
3. Gender

4. Age at Admission
5. Number of Parents/Caregivers
6. Kind of Parents/Caregivers
7. Primary Caregiver

(Note: Each of these charts will be labeled with “n=” in the title, which tells you how many clients are included in the demographic breakdown of that chart.)

In order to better view any slices of each of the pie charts, you can click on the slice and it will separate from the remainder of the slices. This may be helpful for those demographic categories that contain multiple categories.

To navigate back to the main dashboard page, select “Dashboard” from your grey Dashboard Navigation Bar at the top of your page.

iii. Referral Tracking

To view the Referral Tracking dashboard, click the link titled “[Referral Tracking](#)” from the dashboard page.

Once on the referral tracking page, you will find the ability to select the License Period you would like to view.

The Referral Tracking dashboard page contains tables that track scheduled cohort start dates, referrals and the Motivational Interview process, and projects the number of families served by each clinician for the license period selected. This page is divided into tables: one table for each clinician, and a table at the bottom of the page for site totals.

The referral tracking tables are divided by the following columns:

- [Cohort ID](#)
This column indicates a system-generated cohort number that groups clients together who have been assigned to the same cohort.
- [Cohort Start Date](#)
This is the selected cohort start date.
- [Target](#)
This is the target number of clients/families that have been identified for inclusion in the cohort.
- [Eligible Referrals Needed](#)

This is the total number of referrals that fall within the PLL Permissible Treatment Criteria that are needed to reach the target number of families for the cohort.

- Ineligible Referrals Rec'd

This is the total number of referrals received to date for this cohort that DO NOT fall within the PLL Permissible Treatment Criteria.

- Eligible Referrals Rec'd

This is the total number of referrals received to date for this cohort that fall within the PLL Permissible Treatment Criteria.

- Eligible Referrals Contacted

This is the number of the Eligible Referrals Rec'd that have been contacted by phone and have completed the Level 1 Motivational Interview.

- Intakes Completed

This is the number of the Eligible Referrals Rec'd that have completed the Level 2 Motivational Interview, and have completed all intake assessments and paperwork.

- # Attended 2+ Sessions

This is the number of families who completed the Intake process AND have completed at least 2 PLL Sessions (group and/or family coaching).

- Projected Families Served

This is a projection of the aggregate number of families a clinician will have served after each cohort. For cohorts that have already begun, the projection counts the totals from that cohort and any prior cohorts. For cohorts that are planned for the future, the projection counts the aggregate numbers from the # Attended 2+ Sessions for prior cohorts, then adds an average of those prior cohorts to each of the cohorts that are planned to begin in the future.

iv. Completion Rate by Therapist

By clicking this link, you are able to see the completion rates for multiple PLL therapists working in your agency.

v. New Families Served

By clicking this link, you are able to see the new families served within the license period selected. A new family is a client that has had at least two PLL treatment sessions.

F. Proximal (Short Term Outcomes) Charts

Three charts are listed that provide current short-term outcomes: Completion Rates, Referral Engagement, and Lengths of Stay

G. Internal PLL Measures of Effectiveness

By clicking the desired assessment, you are able to see individual youth results as well as total site results. *Note: total site results are only available after ten youth assessments are in the dashboard for a particular license period.

III. Entering new Referrals/Clients

A. Creating a New Cohort

- i. **Step 1:** From the Cohort Tracking page (grey bar at top of Main Dashboard page), click the “Create A New Cohort” link. The user will then be directed to the “Add New Cohort” page which will allow for data entry of the cohort information. *Note: when using the PLL Single Family Delivery System, a cohort of one must be created for each client.

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Home Dashboards Cohort Tracking Client Information Assessments Group Fidelity Coaching Fidelity Video Fidelity Relapse Prevention Reports Signoff

License Period Displayed: 5/2/2013 - 5/1/2014 -- Select Another License Period -- Change

Referral Tracking

[Create A New Cohort](#) ← **Step 1**

Contract ID	Cohort ID	Therapist	Therapist Initials	Therapist Class	Start Date	Min. Referrals Needed	Target	Received	Contacted	Started	
Test	TEST0020	Marketing Team			7/1/2013	10	6	1	1	1	Delete
Test	TEST0021	Marketing Team			8/6/2013	8	6	3	3	3	Delete

- ii. **Step 2:** Select the Coaching Therapist assigned to the cohort by using the drop-down menu for the Coaching Therapist field. Once the therapist is selected, the applicable contact information will automatically appear for the next three fields (Desk phone, Cell phone, & E-mail). If these fields do not automatically update, the user can then add the applicable information.

- iii. **Step 3:** Select the Group Therapist assigned to the cohort by using the drop-down menu for the Group Therapist field. This will be the same selection as the Coaching Therapist.
- iv. **Step 4:** Enter the Minimum # of Eligible Referrals Needed for the cohort. This is the number of referrals that you plan to attempt to engage for this cohort, and it is recommended that you plan to attempt to engage 2 to 3 more families than what you anticipate having in that cohort. *Note: when using the PLL Single Family Delivery System, this number will always be “1”.
- v. **Step 5:** Enter the Target # for Cohort. This is the number of families planned for this cohort, in other words, it will be 2 or 3 fewer than the number entered in Step 4. *Note: when using the PLL Single Family Delivery System, this number will be “1”.
- vi. **Step 6:** Enter the Scheduled Group Start Date. When selected, this field will give the user the ability to select the start date by using a pop-up calendar, or by manually entering the start date. (When manually entering the start date use the following format: mm/dd/yyyy.)
- vii. **Step 7:** Enter any Comments desired for this cohort.
- viii. **Step 8:** Save the cohort by clicking the “Save” button at the bottom of the page. When the cohort is saved, you will navigate back to the Cohort Tracking Summary page. Once there, the newly created cohort should appear.

B. Entering Specific Client Information

As soon as a referral is received, the referral information can be entered in the system. By entering a referral as soon as it is received, the system will allow the clinician to track the intake process for that client regardless of outcome.

- i. **Step 1:** From the Main Dashboard page, click the Client Information page (grey bar at top of Main Dashboard page).
- ii. **Step 2:** Once in the Client Information page, click “Create New Client” and then click the “Client Data” link and fill in the information requested.

*Note: When entering client information, fields showing a red star are required entry fields, however, you are strongly encouraged to provide as much of the non-required data possible.

- iii. **Step 3:** Click on “Referral Information” and provide the information requested. *Note: you must provide information in fields showing a red star. ALSO, if you are providing PLL treatment to this referral using the Single-Family Delivery System, you must check the appropriate box indicating which delivery system you are using with this particular family.
- iv. **Step 4:** This page is used to enter session completed with the referral once they begin their PLL treatment.

There are three fields that summarize the number of sessions completed. The Total # of sessions for Group Sessions and Coaching Sessions are automated and will automatically update as sessions are entered. However, the Total # of Case Management sessions are entered by the Case Manager as case management sessions occur.

1. To enter Group sessions:
 - a. Check the box for that group and then enter the date the group occurred in the date field that pops up
**Note: when using the Single-Family Delivery system, utilize the first five groups to indicate the five Skills Building Sessions and leave Group #6 blank.
2. To enter Family Therapy Coaching sessions
 - a. Click the “Add Family Coaching Session” tab.
 - b. Enter the date the session was completed.
 - c. Select from the drop-down menu, the specific coaching phase that was covered in the session
3. If you wish to add Client notes, click the Summary Completed Date and add today’s date. A field will appear for you to type in client notes. The notes field will expand according to the notes entered. IMPORTANT: any notes you add in this field will appear on the client’s Monthly Summary Report.

C. Entering Client Status

Each client entered in the system is required to have a status selected. To select the client status, click the Client Status tab. Once selected, the Current Status field will be displayed. This is a field that is required to be completed prior to saving the client data. Using the drop-down list for this field, select the appropriate status for the client. There are three available status options:

- i. **Referral Only:** This status is used for a client who has been referred for PLL services but HAS NOT begun PLL sessions. This would include referrals who have yet to be contacted, referrals who have refused services, clients who are in the process of completing motivational interviews or are just waiting for their first PLL session to occur. *Note: once the client attends their first session, REMEMBER to go back to this Client Status page and change the status from “Referral Only” to “In Process”.
- ii. **In Process:** This status is used for any clients who have begun receiving PLL services.
- iii. **Closed:** This status is used for any client who began receiving PLL services and later stopped receiving PLL services. When selecting the “Closed” status, also select the Closure Type from the drop-down menu, and add the Case Closure Date

D. Confirming (Saving) Data

This is the most important step because failure to click the confirm tab will cause all the data entered for that client to be lost.

- i. **Step 1:** To confirm (save) all data entered for the client, click the “Confirm” tab.
- ii. **Step 2:** To save client information, click the “Add New Client” bar on the confirm tab. *Note: if you are adding additional sessions to an existing client and you are going to Confirm, then to save that new information, you will click “Update Client”. Once the client data is saved, you will be returned to the Client Information Summary page. When saving, if there is any required information that is missing, there will be a red “x” shown in the upper left of

the applicable tab where information is missing. To correct, click the tab with the red “x”, and complete the missing information. Any field that is missing required information will also be highlighted.

(WARNING: If you navigate away from the client information tabs prior to saving the client information in the Confirm tab, all entries for that client will be lost.)

IV. Relapse Prevention

The Relapse Prevention page is designed so the user can track clients who have graduated from PLL and will need to have 30-, 60-, and 90-day callbacks completed.

To get to the Relapse Prevention page, click the “Relapse Prevention” listing in the Dashboard Navigation Bar.

A. Entering Relapse Prevention Data

Each client with a Successful Completer status should automatically appear in the summary on the Relapse Prevention page. The relapse prevention summary table as displayed shows a list of all completers along with the client start date, graduation date, and a status listing for each of the callbacks completed.

For each of the Callbacks Completed columns there are four possible listings: “DUE” indicates that the callback for that period was due within the last week OR is due within the next two weeks. “x” means the callback was not completed for that period. A listing of “-” means that the callback is not due to be completed yet. A listing showing a date, is the date that the callback was completed.

As you conduct your callbacks and/or tune-ups, follow the steps below to enter your data:

- i. **Step 1:** Find the column for the applicable callback to be updated. (30-, 60-, or 90-day callback) and enter the actual date the callback was completed.
- ii. **Step 2:** If a Red Flag was noted for the client, click the applicable checkbox for that callback.

- iii. **Step 3:** If there are any notes regarding the Red Flag that was noted in Step 3, add those in the Red Flags Notes field.
- iv. **Step 4:** If a Tune Up was initiated, click the applicable checkbox for that callback. (Note: If a Tune Up was initiated, the Sessions Completed for this client will also need to be updated. For instructions on updating the Sessions Completed section, refer to Section IV of this manual on Client Information.
- v. **Step 5:** If there are any notes regarding the Tune Up that was noted in Step 5, add those in the Tune Up Notes field.
- vi. **Step 6:** If there was any additional action that was being taken with the client, add those notes in the Additional Action Taken field.
- vii. **Step 7:** Click the “Save” item at the bottom of the page to save the updates/changes

B. Creating a Relapse Prevention Measure

In the event a client does not appear on the page, follow the steps below to create the Relapse Prevention Measure for that client.

- i. **Step 1:** From the Relapse Prevention summary page, click “Create New Relapse Prevention Measure”. The user will then be directed to the Add New Client page.
- ii. **Step 2:** From the Add New Client page, use the drop-down menu for Client Information and select the client who you wish to generate a Relapse Prevention Measure for.
- iii. **Step 3:** Click the “Save” button to save the Relapse Prevention Measure. Once you have saved the Relapse Prevention Measure, you will be directed back to the Relapse Prevention summary page where you will find the name of the client you generated the Relapse Prevention Measure for. * Note: Relapse Prevention Measures are not able to be generated for any client with a Referral Only or In Process Status.

V. Reports

A. Using the Reports Page

The Reports page is designed so the user can generate reports based on the data that has been entered in the PLL dashboard. To get to the Reports page, click the listing of “Reports” in the Dashboard Navigation Bar.

On the Reports page a list of available reports is shown. There are two sections of available reports – Site Reports and Assessment Reports.

B. Site Reports

There are three site reports that can be generated.

i. Monthly Performance Summary Report:

This report is generated by client and is available for any client who has been entered in the Dashboard. The monthly summary report will provide comprehensive data for each client in a .pdf format that can be printed or saved by the user.

Follow the steps below to generate the Monthly Performance Summary Report:

1. **Step 1:** Using the drop-down menu, select the Client who you wish to generate the report for.
2. **Step 2:** If there are client notes that have been entered for the selected client, a menu will appear that will display “Select Monthly Performance Summary”.
 - a. **Step 2a:** To display all client notes on the report, select the option for “All Client Notes”
 - b. **Step 2b:** To display client notes only from a specific date, select the desired date.
3. **Step 3:** Click “Generate Report” to generate the Monthly Performance Summary Report. The report will take 20-30 seconds to generate. The report will be generated in a .pdf format that will allow the user to print and/or save the report.

ii. Key Benchmarks for Referral Tracking Report:

This report is generated by license period and summarizes site and therapist results for the period selected in a .pdf format.

Follow the steps below to generate the Key Benchmarks for Referral Tracking Report:

1. Step 1: Using the license period drop-down menu, select the license period for which you wish to generate the report. (Note: The current license period should automatically be filled in this field when selecting this report.)
2. Step 2: If you would like to filter the report based on a specific client type, use the Select Client Type drop-down menu and select the desired client type. If you do not want to run the report by Client Type, make no selection in this field and proceed to Step 3.
 - a. Step 2a: Once a Client Type selection is made, the Client Sub-Type menu will appear. If you would like to filter the report by Client Sub-Type, use the Select Client Sub-Type drop-down menu and select the desired client sub-type.
3. Step 3: Once the license period has been selected (and Client Type/Client Sub-Type, if desired), click “Generate Report” to generate the Key Benchmarks for Referral Tracking Report. The report will take 20-30 seconds to generate. The report will be generated in a .pdf format that will allow the user to print and/or save the report.

iii. Relapse Prevention Report:

This report is generated by license period and summarizes site and therapist results for the period selected in a .pdf format.

Follow the steps below to generate the Relapse Prevention Report:

1. Step 1: Using the Select License Period drop-down menu, select the license period that you wish to generate the report for. (Note: The current license period should automatically be filled in this field when selecting this report.)
2. Step 2: If you would like to filter the report based on a specific client type, use the Select Client Type drop-down menu and select the desired client type. If you do not want to run the report by Client Type, make no selection in this field and proceed to Step 3.
 - a. Step 2a: Once a Client Type selection is made, the Client Sub-Type menu will appear. If you would like to filter the report by

Client Sub-Type, use the Select Client Sub-Type drop-down menu and select the desired client sub-type.

3. **Step 3:** Once the license period has been selected (and Client Type/Client Sub-Type, if desired), click “Generate Report” to generate the Key Benchmarks for Supervision Report. The report will take 20-30 seconds to generate. The report will be generated in a .pdf format that will allow the user to print and/or save the report.

iv. Key Benchmarks for Supervision Report:

This report is generated by license period and summarizes site and therapist results for the period selected in a .pdf format.

Follow the steps below to generate the Key Benchmarks for Supervision Report:

1. **Step 1:** Using the Select License Period drop-down menu, select the license period that you wish to generate the report for. (Note: The current license period should automatically be filled in this field when selecting this report.)
2. **Step 2:** If you would like to filter the report based on a specific client type, use the Select Client Type drop-down menu and select the desired client type. If you do not want to run the report by Client Type, make no selection in this field and proceed to Step 3.
 - a. **Step 2a:** Once a Client Type selection is made, the Client Sub-Type menu will appear. If you would like to filter the report by Client Sub-Type, use the Select Client Sub-Type drop-down menu and select the desired client sub-type.
3. **Step 3:** Once the license period has been selected (and Client Type/Client Sub-Type, if desired), click “Generate Report” to generate the Key Benchmarks for Supervision Report. The report will take 20-30 seconds to generate. The report will be generated in a .pdf format that will allow the user to print and/or save the report.

v. Key Benchmarks for Stakeholders Report:

This report is generated by license period and summarizes the overall site results for various measures in a .pdf format.

Follow the steps below to generate the Key Benchmarks for Stakeholders Report:

1. Step 1: Using the Select License Period drop-down menu, select the license period that you wish to generate the report for. (Note: The current license period should automatically be filled in this field when selecting this report.)
2. Step 2: If you would like to filter the report based on a specific client type, use the Select Client Type drop-down menu and select the desired client type. If you do not want to run the report by Client Type, make no selection in this field and proceed to Step 3.
 - a. Step 2a: Once a Client Type selection is made, the Client Sub-Type menu will appear. If you would like to filter the report by Client Sub-Type, use the Select Client Sub-Type drop-down menu and select the desired client sub-type.
3. Step 3: Once the license period has been selected (and Client Type/Client Sub-Type, if desired), click “Generate Report” to generate the Key Benchmarks for Supervision Report. The report will take 20-30 seconds to generate. The report will be generated in a .pdf format that will allow the user to print and/or save the report.

C. Assessment Reports

There are two assessment reports that are available to be generated.

i. CBCL Report:

This report can be generated either by license period or by client. This report provides scoring results for CBCL assessments for either the site or client (as selected) in a .pdf format that can be printed or saved by the user.

To generate the CBCL Report by site, begin by clicking the listing for the “CBCL Report” from the Reports page. Then follow the steps below:

1. Step 1: Using the Select License Period drop-down menu, select the license period that you wish to generate the report for. (Note: The current license period should automatically be filled in this field when selecting this report.)

2. Step 2: If you would like to filter the report based on a specific client type, use the Select Client Type drop-down menu and select the desired client type. If you do not want to run the report by Client Type, make no selection in this field and proceed to Step 3.
 - a. Step 2a: Once a Client Type selection is made, the Client Sub-Type menu will appear. If you would like to filter the report by Client Sub-Type, use the Select Client Sub-Type drop-down menu and select the desired client sub-type.
3. Step 3: Once the license period has been selected (and Client Type/Client Sub-Type, if desired), click “Generate Report” to generate the CBCL Report. The report will take 20-30 seconds to generate. The report will be generated in a .pdf format that will allow the user to print and/or save the report.

To generate the CBCL Report by client, simply take one additional step of selecting the client name that you wish to generate the report for. (Note: Clients are only listed once a pre-test, post-test, or both have been entered into the database) REMEMBER to click “Generate Report” to generate the CBCL Report. The report will take 10-30 seconds to generate.)

ii. **FACES Report:**

This report can be generated either by license period or by client. This report provides scoring results for FACES IV assessments for either the site or client (as selected) in a .pdf format that can be printed or saved by the user.

To generate the FACES IV Report by site, begin by clicking the listing for the “FACES IV Report” from the Reports page. Then follow the steps below:

1. Step 1: Using the Select License Period drop-down menu, select the license period that you wish to generate the report for. (Note: The current license period should automatically be filled in this field when selecting this report.)
2. Step 2: If you would like to filter the report based on a specific client type, use the Select Client Type drop-down menu and select the desired client type. If you do not want to run the report by Client Type, make no selection in this field and proceed to Step 3.
 - a. Step 2a: Once a Client Type selection is made, the Client Sub-Type menu will appear. If you would like to filter the report by Client Sub-Type, use the Select Client Sub-Type drop-down menu and select the desired client sub-type.

3. Step 3: Once the license period has been selected (and Client Type/Client Sub-Type, if desired), click “Generate Report” to generate the FACES IV Report. The report will take 20-30 seconds to generate. The report will be generated in a .pdf format that will allow the user to print and/or save the report.

To generate the FACES IV Report by client, simply take one additional step of selecting the client name that you wish to generate the report for. (Note: Clients are only listed once a pre-test, post-test, or both have been entered into the database) REMEMBER to click “Generate Report” to generate the FACES IV Report. The report will take 10-30 seconds to generate.

VI. Umbrella Contracts & Users with Access to Multiple Contracts

An Umbrella Contract is a grouping of contracts set up in the system that allows the user to aggregate data across multiple sites. For user’s who have been assigned an Umbrella Contract there are special instructions for using the dashboard.

While using an umbrella contract, updates and edits to data entry fields are not permitted. Updates and edits are only permitted when looking at an individual contract outside of an umbrella label.

Some users have access both to an umbrella contract (and its sub-contracts) as well as individual contracts (where updates and edits can be made). For these users, a “HOME” page will be listed in the Dashboard Navigation Bar. (see section titled “Users with Access to Multiple Contracts” below for further instructions regarding these logins.)

A. Users with Access to Multiple Contracts

Some users have access both to an umbrella contract (and its sub-contracts) as well as individual contracts (where updates and edits can be made). For these users, a “HOME” page will be listed in the Dashboard Navigation Bar. The HOME page allows the user to select which contract they would like to work with.

By making a contract selection on the home page, the user will be logged in to that individual contract. Once a contract is selected, the user can make updates to the data (since this is not possible while logged in to an Umbrella contract). Once a contract is selected on the Home page, the user will automatically navigate back to the main dashboard page. From there, the dashboard will operate as normal until a new contract selection is made.

To change from one individual contract to another:

- Step 1: Navigate to the Home page on the Dashboard Navigation Bar
- Step 2: Use the dropdown menu to select the desired contract and click "Select."

To Toggle back to an Umbrella Contract:

- Step 1: Click on the Dashboards page.
- Step 2: Using the Contracts dropdown menu, select the applicable Umbrella Contract (contract starting with UMB---).
- Step 3: Click Change

Note: If the user desires to look at one of the sub-contracts for the umbrella, without having the capability to make edits/updates, select the applicable contract name listed BELOW the Umbrella contract listing

B. Using the Dashboard Pages for Umbrella Contracts

i. Main Dashboard Page

When logged in to the dashboard with an umbrella contract, the user will notice a couple of different features that are available. The user has the ability to quickly toggle between each of the individual contracts they have been assigned access to and the umbrella contract (which aggregates data from the assigned contracts). Additionally, Umbrella users have the ability to view data for customized date periods.

Toggling Between Contracts: *(on next page)* At the top of the main dashboard page, in the Contracts field, there is a dropdown menu that contains a listing of the contracts that are available to the user. To display a particular site, select the desired site then click the Change button on the screen. The dashboard will then update based on the selection.

Selecting Custom Dates: To display data based on a specific date period, the user will need to enter the desired dates in the “Date From” and “To” fields. Once entered, click the Change button and the data will update based on the dates selected.

ii. Demographics and Referral Tracking Dashboard Pages

Toggling Between Contracts: At the top of each of these pages there is a dropdown menu that contains a listing of the contracts that are available to the user. To display a particular site, select the desired site then click the Change button on the screen. The page will then update based on the selection.

Selecting Custom Dates: To display data based on a specific date period, the user will need to enter the desired dates in the “Date From” and “To” fields. Once entered, click the Change button and the data will update based on the dates selected.

C. Cohort Tracking, Client Information, Assessments, and Relapse Prevention Pages for Umbrella Contracts

On the cohort tracking page, client information page, assessments page, and relapse prevention page, the user can also toggle between contracts and select custom dates to view summary data. (Data updates and editing are not permitted on these pages when viewing an umbrella contract or any of its sub-contracts.)

To Toggle between sites: At the top of each page there is a dropdown menu that contains a listing of the contracts that are available to the user. If left as is, the page will display all data for the umbrella contract. To display a particular site, select the desired site then click the Change button on the screen. The page will then update based on the selection.

Selecting Custom Dates: To display data based on a specific date period, the user will need to enter the desired dates in the “Date From” and “To” fields. Once entered, click the Change button and the data will update based on the dates selected.

D. Reports Page for Umbrella Contracts

Each of the reports on the Reports page are also able to be utilized with the Umbrella contract.

Key Benchmarks for Supervision Report: To run this report under an umbrella contract, a site **MUST** be selected. (This report is not able to be generated using aggregate data across all sites in the umbrella.) To run this report, use the dropdown menu to select the desired site. If a specific date period for the report is desired, make those selections in the Date From and To fields. Once all the selections are made, click “Generate Report”.

Relapse Prevention Report, Key Benchmarks for Stakeholders Report, CBCL Report, FACES Report, and Readiness Report: To run any of these reports under the umbrella contract, the user has the option to run the report for “All Sites” or by individual sites. To run any of these reports, use the dropdown menu to select the desired site. If a specific date period for the report is desired, make those selections in the Date From and To fields. Once all the selections are made, click “Generate Report”.

Appendix A

Sessions Required for Graduation (by Condition Code)

Condition* - Most appropriate classification of a youth in PLL				
States	Abbreviation	Condition	Min. FT	Definition
All Locations (except Alaska Reentry teams & Rhode Island)	D	Diversion	4	A process by which a youth is channeled from the juvenile justice system. Examples are Informal Adjustment, Truancy Court, etc.
	P	Probation	6	Includes all referrals and youth disposed with placement on Juvenile Probation. Youths are placed on probation by order of a judge and Probation Officers supervise the youths' performance of sanctions ordered by the judge at the time of disposition.
	R	Residential/ Reentry	12	Youth placed in out of home placement.
	FC	Foster Care	12	generally, care of children on a full-time, temporary basis by persons other than their own parents.
	SED	Severe Emotional Disturbance	6	For the individual to be deemed emotionally disturbed, it must be determined that the child's condition results in functional impairment, substantially interfering with one or more major life activities, such as the abilities to eat, bathe, and dress oneself, or the ability to function effectively in social, familial, and educational contexts.
Alaska	OCS-3	OCS - Level 3	12	Youth placed in Level 3 program.
	OCS-2	OCS - Level 2	8	Youth placed in Level 2 program.

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(BTKH - Reentry)	OCS-IC	OCS In Community	6	Youth in community and has not participated in L2 or L3 program.
	DJJ-3	DJJ – Level 3	12	Youth placed in Level 3 program.
	DJJ-2	DJJ – Level 2	8	Youth placed in Level 2 program.
	DJJ-IC	DJJ In Community	6	Youth in community and has not participated in L2 or L3 program.
	AC	Acute Care (Out-Patient)	6	SED youth is referred to PLL in order to prevent eventual placement.
	V2	Voluntary Placement (Level 2)	8	Family selects to place child in placement in a Level 2 program.
	V3	Voluntary Placement (Level 3)	12	Family selects to place child in placement in a Level 3 program.
	<ul style="list-style-type: none"> • Status is assigned based on original referral source and status at the time of the referral but is subject to change if youth goes deeper in program level. Example: Youth in Level 2 at time of referral but after assessment is placed in Level 3 program. • Status does not change if level decreases during course of PLL treatment. Example: Youth in Level 2 or Level 3 returns back to community. 			
Rhode Island (Reentry)	A	Adjudicated/ Probation or Wayward	12	The court declares a child wayward resulting in placement. (Youth may or may not be placed on Probation)
	V	Voluntary Placement	12	A parent presents themselves and their child to DCYF requesting assistance.
	DCYF-C	DCYF Custody	12	In the custody of DCYF – Parent rights have been terminated (TPR) and a long-term caregiver has been assigned.
	DP	Dependency	12	Parents cannot meet the needs of the child and go before the court; case results in involuntary shared custody between DCYF and Parents.

Appendix B

PLL Inclusionary & Exclusionary Criteria for Treatment

INCLUSIONARY CRITERIA

- Youth's age is 10 to 18 years old
- Exhibiting emotional or behavioral problems, such as depression, anxiety disorders, substance abuse, oppositional defiant disorder, conduct disorder, ADHD, eating disorders, etc.
- **Must have a parent or caregiver present- foster parents and kinship care are welcome**
- Youth having committed a sex offense, as long as the following conditions are met:
 - Referral source must understand that PLL is not the sex offender treatment provider
 - Youth and caregiver must be in the same home
 - Youth must be permitted to attend the PLL Group sessions with peers

EXCLUSIONARY CRITERIA:

- Actively psychotic clients
- Actively homicidal clients
- Actively suicidal clients
- Caregiver or youth with an Intelligence Quotient (IQ) of less than fifty (50)

Any Exception to the inclusionary/exclusionary criteria rule must be approved in writing by PLL

Appendix C Closure Types

Successful Completer	Family enrolled attended an equivalent of 5 out of 6 groups and received the full dosage of the 4 core coaching phases.
Drop Out	Youth commitment or re-commitment (not as a result of charge received prior to being a PLL Active Case).
Drop Out	Youth placed or re-placed in Foster Care.
Drop Out	Parent non-participation.
Drop Out	Parent non-compliant.
Drop Out	Youth non-compliant.
Drop Out	Lack of contact with family; Unable to contact family.
Drop Out	Did not complete Group Session requirement.
Drop Out	Did not complete Family Coaching requirement.
Drop Out	No show/Lost contact.
Drop Out	Caregiver medical issues.
Drop Out	Youth medical issues.
Drop Out	Parent incarcerated.
Drop Out	Other
Administrative Discharge	Family attends 1 session (group or coaching) but does not follow through with any additional group or coaching sessions.
Administrative Discharge	Family moves out of service area.
Administrative Discharge	Judge disagrees with recommendation for PLL and removes youth from program.
Administrative Discharge	Youth is committed or pending placement in residential based on charges prior to being a PLL Active Case .
Administrative Discharge	Family begins PLL but does not fall within the Permissible Treatment Criteria .
Administrative Discharge	Referral Provider informs family PLL is optional and petitions court for termination of court supervision without successful PLL closure.
Administrative Discharge	Death of youth or caregiver.
Administrative Discharge	Loss of jurisdiction.

Appendix D
Offense Categories/Dispositions

Category	Disposition
Destruction of Property	Arson
	Property Damage
	Felony Vandalism
	Vandalism
	Offenses against Property
Legal System Violation	Contempt of Court
	False Information
	False Report
	Obstruction of an Officer
	Violation of Probation
	Escape from Training School, Secure Detention, or Residential Program
	Obstruction of Justice without Violence
	Misdemeanor Obstruction of Justice
	Violation of Aftercare/Furlough
	Violation of Community Control
	Pick up Order
	Interstate Compact
Mischief/ Misbehavior	Criminal Attempt
	Curfew Violation
	Disorderly Conduct
	Entering an Auto
	Tampering/Interfering w/ Government Property
	Loitering or Prowling
	Runaway
	Reckless Conduct
	Traffic Violation
	Trespass
	Parent Filed Unruly Charge
	Violation of Hunting, Fishing, Boating Laws
	Non-Felony Traffic Offenses
	Non-Criminal Infraction

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	Behavioral Problems in the Community
	Behavioral Problems at Home
No Charges	No Charges
Other	Other Felony
	Misdemeanor Other
	Violation of County, Municipal Ordinance
	Federal Charge
Illegal Possession	Carrying a Concealed Weapon
	Simple Drug/Alcohol possession
	Tobacco Possession
	Weapon or Firearm Offense
	Felony Drug Laws
	Misdemeanor Weapon or Firearm offense
	Misdemeanor Drug Laws
	Misdemeanor Alcohol Offenses
	Substance Abuse
School Violation	Disturbing School
	Truancy/Skipping School
	Behavioral Problems at School
Sex Offense	Sexual Battery
	Other felony Sex Offense
	Misdemeanor Sex Offense
Theft	Auto Theft, Unlawful Drive-Away of an Automobile
	Burglary
	Forgery
	Shoplifting
	Theft-General (take, recv, convert, not SL)
	Other Robbery
	Grand Larceny
	Forgery - Counterfeiting
	Stolen Property
	Petit Larceny

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Violence/Threat of Violence	Battery
	Cruelty to Animals
	Fighting in a Public Place
	Inciting a Riot
	Assault & Battery
	Assault with a Deadly Weapon
	Attempted Home Invasion
	Domestic Violence
	Home Invasion
	Robbery with Force
	Simple Assault
	Terroristic Threats
	Murder, Manslaughter
	Attempted Murder, Manslaughter
	Kidnapping
	Armed Robbery
	Aggravated Assault and/or Battery
	Obstruction of Justice with Violence
Assault and/or Battery - Not Aggravated	
Violent or Aggressive Offenses	

Appendix E

Glossary of Terms

30-Day Callback - A follow up phone call with the family that is completed 30 days post-graduation with the intent of identifying whether the family is continuing to use the tools learned from PLL, if there are any Red Flags, or if a Tune-Up Session is needed.

60-Day Callback - A follow up phone call with the family that is completed 60 days post-graduation with the intent of identifying whether the family is continuing to use the tools learned from PLL, if there are any Red Flags, or if a Tune-Up Session is needed.

90-Day Callback - A follow up phone call with the family that is completed 90 days post-graduation with the intent of identifying whether the family is continuing to use the tools learned from PLL, if there are any Red Flags, or if a Tune-Up Session is needed.

Assessments – Outcome measures that are completed by the client and caregiver to identify changes in the client, family, and family structure due to PLL services.

Assessments are administered to the youth and/or caregiver as a pre-test (at the start of the PLL program) and again as a post-test (at the conclusion of the PLL program).

CBCI – The Child Behavior Checklist assessment that is completed by the primary caregiver for the client as a pre-test (prior to beginning PLL services), and as a post-test (at the completion of PLL services).

FACES IV - Family Adaptability and Cohesion Evaluation Scale that is completed by both the client and primary caregiver as a pre-test (prior to beginning PLL services), and as a post-test (at the completion of PLL services).

Client Status – The designation of where a client is in the PLL process.

Closed - This status is used for all clients who have successfully completed PLL programming, who for voluntary or other similar reasons have stopped receiving PLL services or have stopped receiving PLL services for involuntary reasons.

Successful Completer - This status is used for all clients who have successfully completed PLL programming.

Dropout – This status is used for all clients who for voluntary or other similar reasons have stopped receiving PLL services.

Administrative Discharge – This status is used for all clients who have stopped receiving PLL services for involuntary reasons.

In Process – This status is used for any clients who are currently receiving PLL services.

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Referral Only - This status is used for any clients who have been referred for PLL services but HAVE NOT begun PLL sessions. This would include referrals who have yet to be contacted, referrals who have refused services, clients who are in the process of completing motivational interviews, or who are just waiting for their first PLL session to occur.

Client Type/Sub-Type – Identifiers of the type of services a client is receiving and what type of referral (sub-type) provided the client for PLL services.

Coaching Therapist – The PLL trained clinician who is assigned to provide coaching sessions for clients assigned to a cohort.

Cohort Start Date – The date Group 1 is planned for a particular cohort or group.

Cohort Tracking – The dashboard page that is used to properly plan and project families being served throughout the license period.

Contact Outcome – The selected outcome of the Level 1 Motivational Interview. Options for this selection are: Not Contacted, Unable to Contact, or Family Contacted.

Dashboard Navigation Bar – The area of the dashboard pages that is used for navigation to the various dashboard pages. This bar is located at the top of each page when using the dashboard.

Dashboard Password – A user’s personalized password that is needed to login to the dashboard from the Fidelity Dashboard login page.

Dashboard Username – A user’s personalized login name that is entered on the Fidelity Dashboard login page.

Demographics Dashboard – Dashboard page that charts demographic results for the Center of Excellence.

Distal (Long Term) Outcomes – Expected outcomes over an extended period of time from use of the PLL model. Expected outcomes are: decreased criminal recidivism, replacements, or readmissions to mental health services; overall reduced length of stay in residential or community; and cost avoidance or cost savings.

Eligible Referral – A Referral received that fits within the permissible treatment criteria and has valid contact information.

A FAMILY SYSTEMS STABILIZATION AND TRAUMA MODEL

Group Therapist - The PLL trained clinician who is assigned to provide group sessions for clients assigned to a cohort.

Intake Outcome - The selected outcome of the Level 2 Motivational Interview (Intake Interview). Options for this selection are: Intake Not Complete, Family Agreed/Intake Complete, or Family Refused.

Internal PLL Measures of Effectiveness – Outcome measures that are completed by the client and caregiver to identify changes in the client, family, and family structure due to PLL services. Otherwise known as Assessments.

Key Benchmarks for Referral Tracking Report - Report that provides charts of various outcomes for the site that tracks the effectiveness of the referral process and referral results by source.

Key Benchmarks for Stakeholders Report – Report that provides charts of various outcomes for the site that is targeted for administrators and stakeholders.

Key Benchmarks for Supervision Report – Report that provides charts and information regarding how each site is performing. This report is used during PLL Consultation sessions.

Level 1 Motivational Interview – The first formal contact by the PLL clinician with a referral that attempts to engage the family in PLL services. This interview is conducted by phone.

Level 2 Motivational Interview – An in-person contact by the PLL clinician with a referral that attempts to engage the family in PLL services.

License Period – The time period that a Center of Excellence is licensed to provide PLL services.

Monthly Performance Summary Report – Report that provides client specific progress information and results.

Network ID – Each COE's assigned login name that allows the user to login to PLL's webpage, www.gopll.com.

Permissible Treatment Criteria – List of requirements that make a client eligible to receive services from PLL.

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PLL Logic Model – This is a diagram of the intended process and outcomes that are achieved by using the PLL model. The logic model can be accessed from any dashboard page.

Projected Families Served – The expected number of families that a clinician will provide PLL services for during a license period.

Proximal (Short Term) Outcomes – The expected results from use of the PLL model. Expected outcomes are increased parent involvement, decreased referral attrition, decreased length of stay, increased behavior & mental health, increased family functioning, and decreased trauma levels.

Red Flags – Identified warning signs for possible relapse issues and action steps identified during a post-graduation call back.

Referral Source – The type and source of a client that was referred to the PLL program.

Referral Tracking Dashboard Page – The page of the dashboard that is used to track the process of planning, receiving, and contacting referrals to PLL programming.

Relapse Prevention Dashboard Page – This part of the dashboard allows the user to track clients who have graduated from PLL and will need to have 30-, 60-, and 90-day callbacks completed.

Relapse Prevention Report – This report allows the user to track clients who have graduated from PLL and have had, or need to have 30-, 60-, and 90-day callbacks completed and whether any red flags or tune-ups were needed or completed.

Site Password – Each COE's assigned password that allows a user from that site to log in to the PLL webpage, www.gopll.com.

Tune-Up – A follow-up family coaching session that is completed post-graduation to help reduce the possibility of a relapse of behaviors.

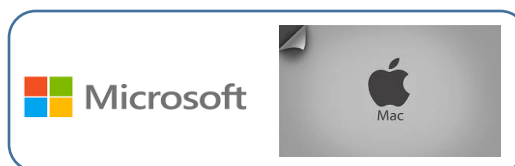
Umbrella Contract – A grouping of contracts set up in the system that allows the user to aggregate data across multiple sites.

Utilization Rate – A ratio of the number of families served by a clinician during a license period as compared to either the clinical minimum number of families to be served, or to the licensed number of families to be served.

Appendix F Uploading Videos to PLL's Secure Server

Recommendations:

Use FTP (Filezilla) for Windows and MAC →



Use sFTP Client for Chrome →



PC OR MAC USERS

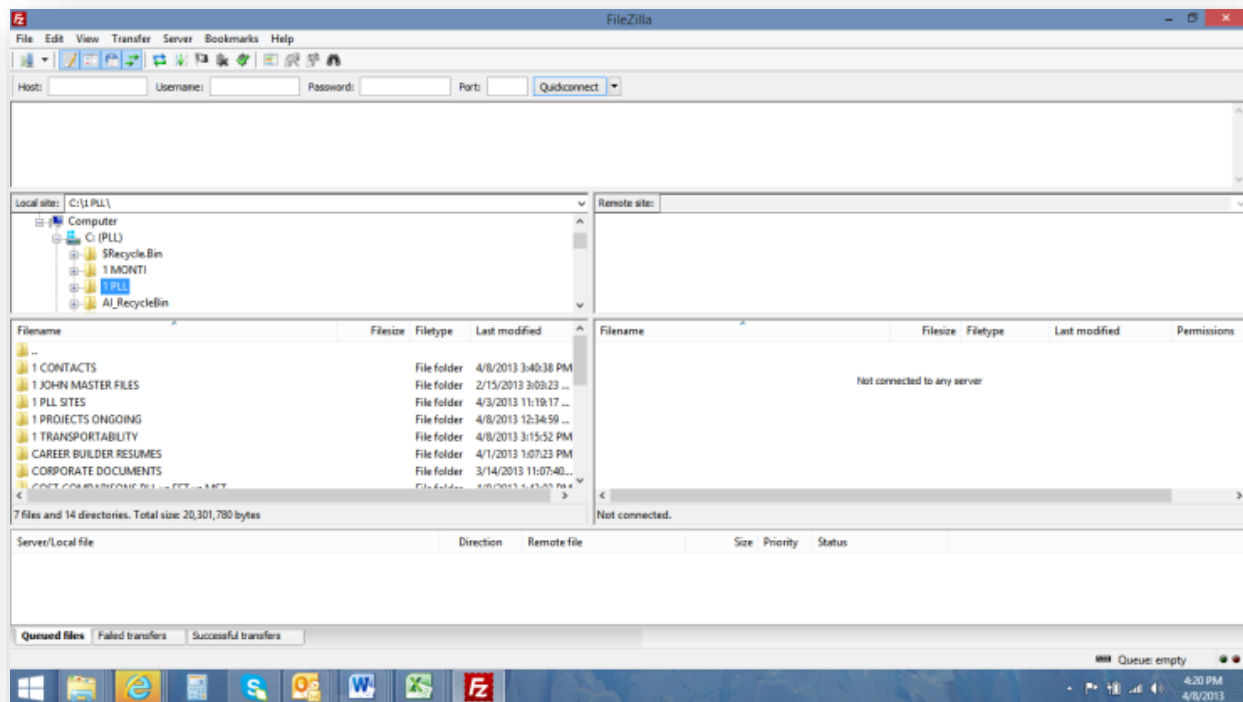
Steps for using Filezilla:

Step 1: Download Filezilla from the following website: www.filezilla-project.org

If you need help with specific instructions for downloading and installing Filezilla, view this YouTube video at <http://www.youtube.com/watch?v=Wtqg1Mn1ltA>

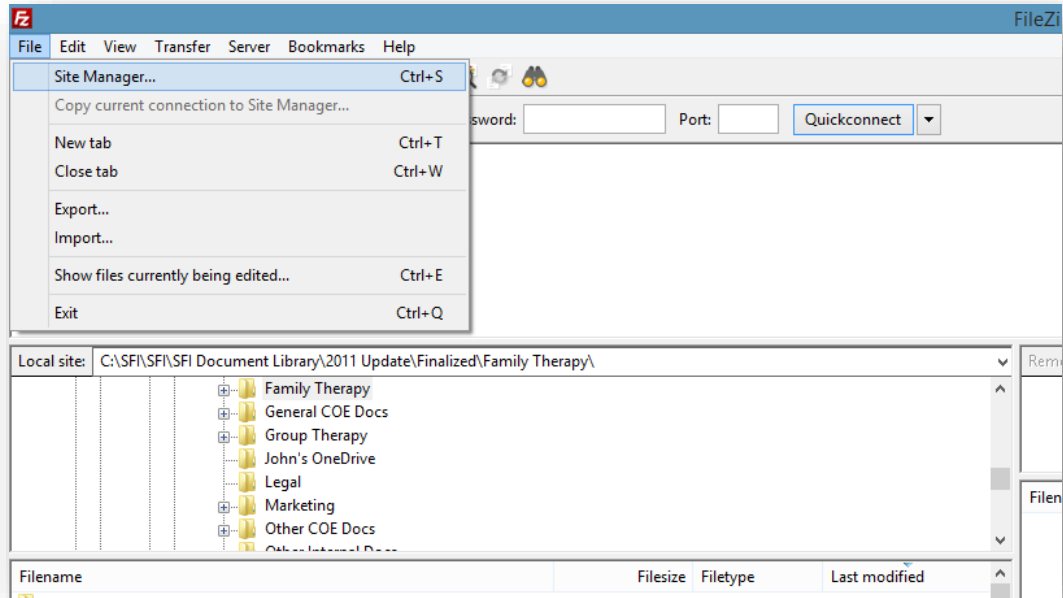
Step 2: Once you have downloaded Filezilla, open the program by double-clicking on the FileZilla icon on your desktop.

Step 3: When you open your FileZilla program for the first time, the “local browser screen” will appear. This screen should show your computer’s hard drive (C:) on the left side. Nothing will show on the right side until you have logged into PLL’s secure server.



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Step 4: In order to open a “remote browser connection” which allows you to access PLL’s secure server, you must open the Site Manager dialog box. To do this, select the “File” menu and then select “**Site Manager**”.



Step 5: On the left side of the Site Manager, click on the **New Site** button and type a unique name, like “PLL”, under **My Sites** that will allow you to easily identify this particular remote server.

Step 6: On the right side, set the Host to sftp.gopll.com

Step 7: Set the protocol to **SFTP - SSH File Transfer Protocol**

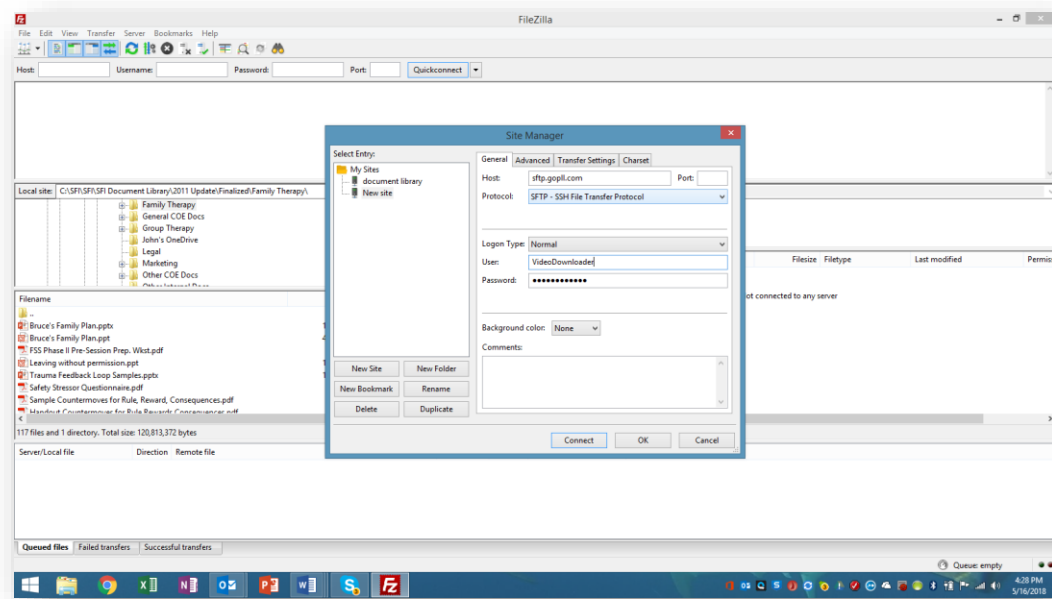
Step 8: Set the Logon Type to **Normal**

Step 9: Now, enter your site’s **Username and Password** (provided to you by PLL)

Step 10: Click **Connect**

- The first time you connect, you will get a dialog informing you that the host key is not known. This is normal, and you should check “Always trust this host, add this key to the cache”, and click OK. You will not be prompted about this in the future and should exercise caution if you are notified again without notice from PLL.
- In the future, you can click on **Site Manager**, and then double click on the connection name, “PLL”, in our example.

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Step 11: Once you have clicked Connect, FileZilla will log you into the server, and when connected, you will see the term, **Directory listing successful.**

- When you have logged in successfully, you will see the “Remote Site” yellow file folder appears.

****Note:** In the event that you have entered all the proper information, and you are unable to login to the remote browser, use the Network Configuration Wizard to test your setup. The Network Configuration Wizard can be found under the Edit menu. Also check to ensure that the port being used for the connection is 21. Once the correct information is entered for the remote connection, click **“Quickconnect”** to connect.

Step 12: Once you have logged onto the server, you can now upload your video. Once the “remote browser” is open, your screen is split into two sections/browsers: “Local Site” on the left and “Remote Site” on the right. To upload the desired video file from your computer, select the appropriate drive (example (C:)) from the “Local Site” section and the correct file from the “Filename” section.

Simple, click, drag, and drop the video file to the yellow folder at the Filename section (on the right side). At this point, the file should begin to transfer. You will be able to see the file listed in the “transfer Queue” at the bottom of the screen. This area will show the status of the file as it is being uploaded to the server. The transfer queue will also show the estimated time left for the transfer. If you have multiple files to transfer, you are able to drag and drop as many files as you like, and they will also show in the

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transfer queue. FileZilla will only upload 2 files at a time. Once a file is completed, FileZilla will automatically start transferring the next file to be transferred.

Since most video files are large, the transfer time may be lengthy. The time that it takes to transfer depends on the size of the file and the speed of your internet connection. For very large files and /or multiple video files, it is recommended that you start the transfer process in the evening and let it run overnight.

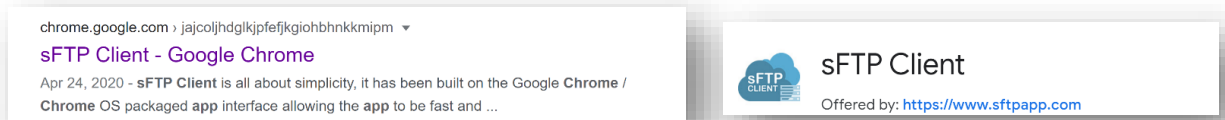
Step 13: You will know the transfer has been completed when the video file name is now populated on the right side in the “Filename” section of the server. It will list all files that have completed transferring.

Step 14: Upon completion of uploading videos, complete your VIDEO UPLOAD CHECKLIST and email to Sharon Mills.

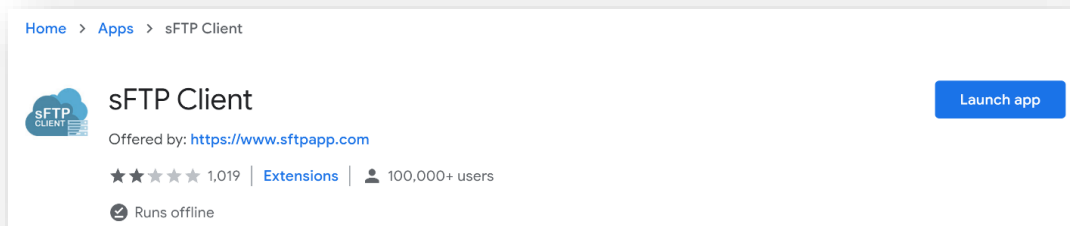
CHROME BOOK USERS

Steps for using sFTP:

Step 1: In your search engine, type in “sFTP Client for Chrome” (it should be the first or second option)



Step 2: Click the option and you should see option below



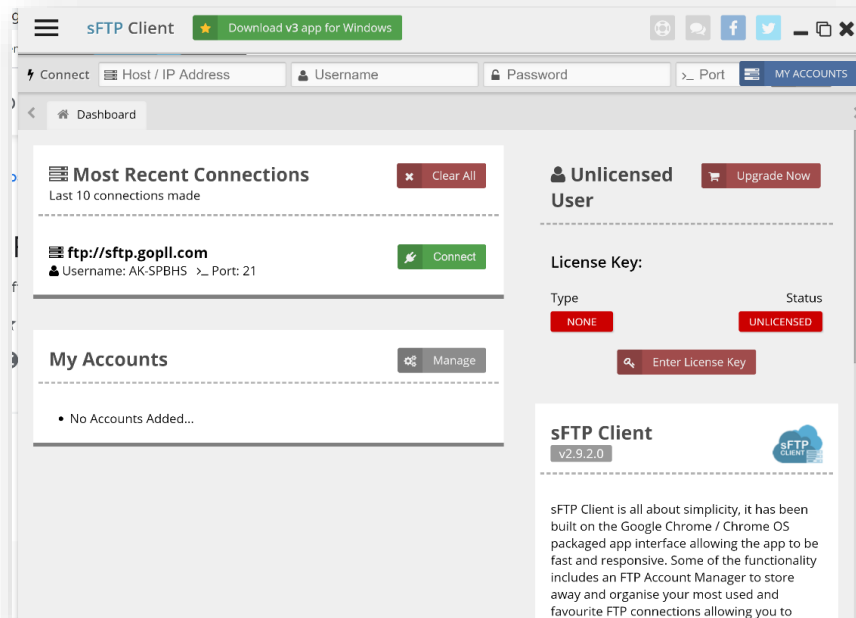
Step 3: Click the blue button on the right “Launch App”

Step 4: There is a 30-day free trial, you can use for 30 days first and then pay or pay the one-time cost of \$30

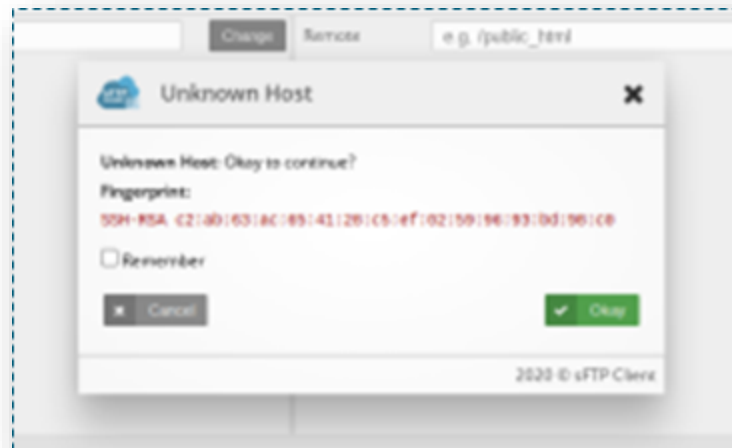
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Step 5: You will see the page that looks like the picture below. Populate the following fields:

- “Host / IP Address” – always type in “sftp.gopll.com”
- “Username” – use the name assigned to your site
- “Password” – use the password assigned to your site
- “Port” – type in port “22”

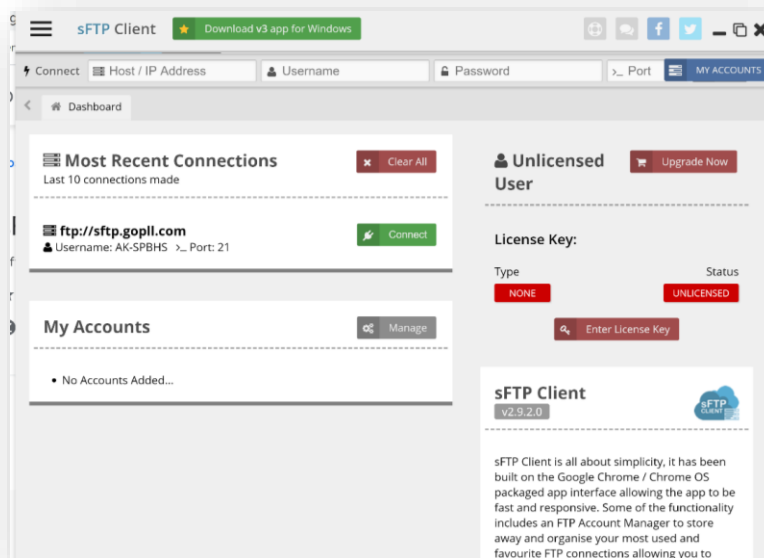


Step 6: A one-time screen will pop up like the one below. Check the box and click the green close option

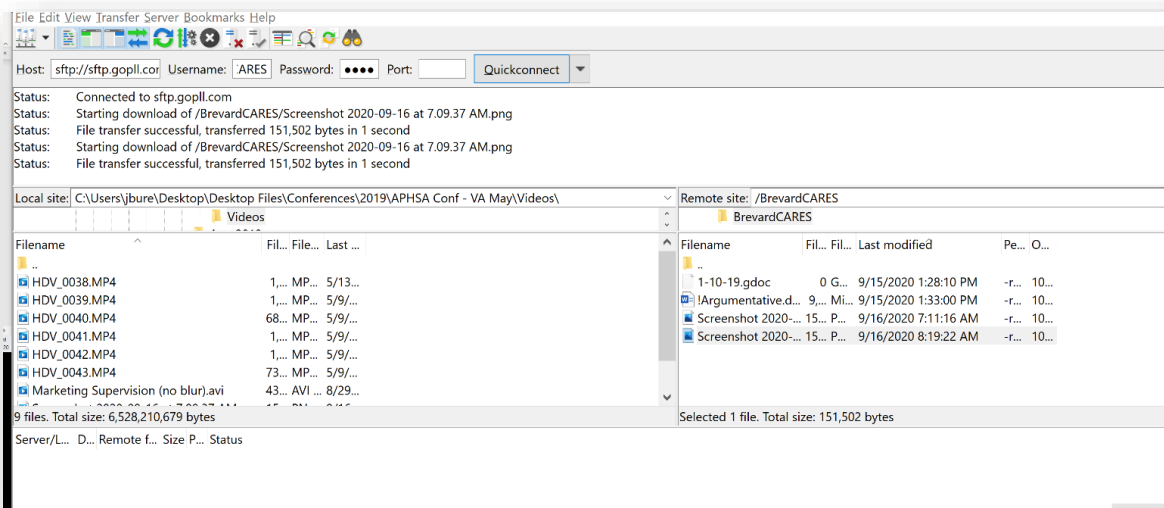


A FAMILY SYSTEMS STABILIZATION AND TRAUMA MODEL

Step 7: Once you have populated the fields one time, the program will remember, and you can click “**Most Recent Connections**”. Under the most recent connections, you will see <ftp://sftp.gopll.com> with a green connect option. Click the green connect button and it will bring you to the place where you select files to be uploaded.



Step 8: You will see the files on the left under “filename” and these files are in your chrome book. Just like you do when searching for files on your computer, go to the location where your video is saved and drag or double click the video file to be uploaded.



****Once you have clicked on the video file to upload, you will see a green bar moving from left to right, indicating the video file is uploading. Once the upload is finished, the green bar will appear on the right indicating the upload is complete.**