# CAFAS v5.4

# ADMINISTRATORS SOFTWARE TRAINING

Agenda

I. Installation Administration Functions

II. Administrative and Aggregate Reports

III. Exporting CAFAS Data into Excel

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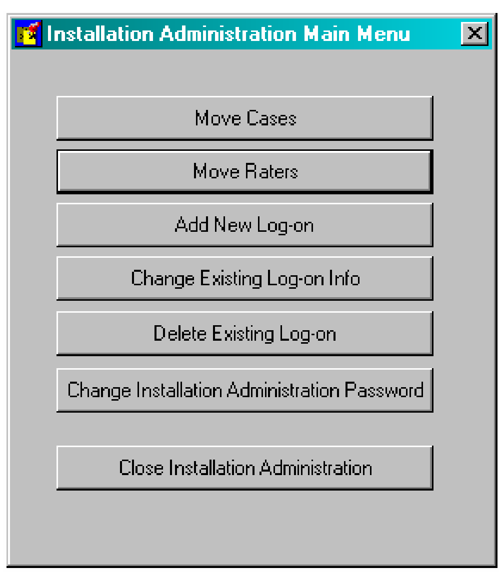
## INSTALLATION ADMINISTRATION FUNCTIONS

### 1. CAFAS Installation Administration Functions Main Menu.

Access is through **Start - Programs - Cafas** path. Click on CAFAS Installation Administration. Enter the default password: **admin** - all lower case.

** It is in your best interest to **NEVER** change this password! CAFAS in Ontario does not provide password retrieval assistance if your password is forgotten.

The Main Menu box will appear.



## 2. To Add a New Log-on or Site

Click on Add New Log-on. Enter an agency name as well as a site name (may be geographic location, eg. Ottawa). Enter a password and re-enter the password. It is recommended that the password be the same as the site name to make it easy to remember. A message will appear telling you that the new log-on has been added.

You can use this feature to add new agency sites as well as different program log-ons if you would like certain programs to have separate log-ons.

It is recommended that, in addition to your agency log-on, that you create at least one other log-on for training and/or junk. You will therefore have the following log-ons:

| | | |
|---|---|---|
| Agency | : | Your official agency log-on/site for clients receiving service |
| Train | : | A log-on, separate from the main agency log-on, for new software users learning to navigate the software |
| Junk | : | Client files cannot be deleted but they can be moved. A junk or garbage site can be used to store spoilt cases and duplicate files. This will allow you to manage the quality of the data that is stored in your main agency log-on. |

You may choose to use one log-on for both training and junk/garbage.

## 3. To Change Existing Log-on Information

If you want to change the name or password of a log-on, click on Change Existing Log-On Info. Use the black arrow and select the log-on you want to change. Make your changes and click OK.

## 4. To Delete an Existing Log-on

Note: A log-on cannot be deleted if it has cases associated with it. It must be empty.

Click on Delete Existing Log-on. Use the black arrow and select the log-on you want to delete. Click delete. A message will appear asking you to confirm that you want to delete the log-on. Click Yes. The log-on will be deleted.

## 5. To Move Cases

You can move client files from one log-on or site to another. Click on Move Cases. Use the black arrows and select the original site where the client is listed and select the new agency site.

If you would like to move all cases associated with the original site to the new site, click on Move All Cases.

If you would like to move selected cases, click on Move Some Cases. Select the cases you want to move by checking the box on the left of the child's name. Click OK.

## 6. To Move Raters

Raters names are entered into a specific log-on and they are associated with that log-in. (See To Enter a New Rater in the next section.) If you want to move a rater from one log-on to another, click on Move Raters. Use the black arrows and select the original site where the rater is already listed and select the new agency.

To move **all** raters, click on Move All Raters.

To move individual raters, click on Move Some Raters. Select the rater/s you want to move by checking the box to the left of the rater/s name. Click OK.

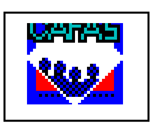
## 7. IMPORTANT NOTE : DO NOT change the installation administration password.

Leave the password as the default password which is **admin**. This is for your protection and for the protection of all those involved.

## ADMINISTRATIVE AND AGGREGATE REPORTS

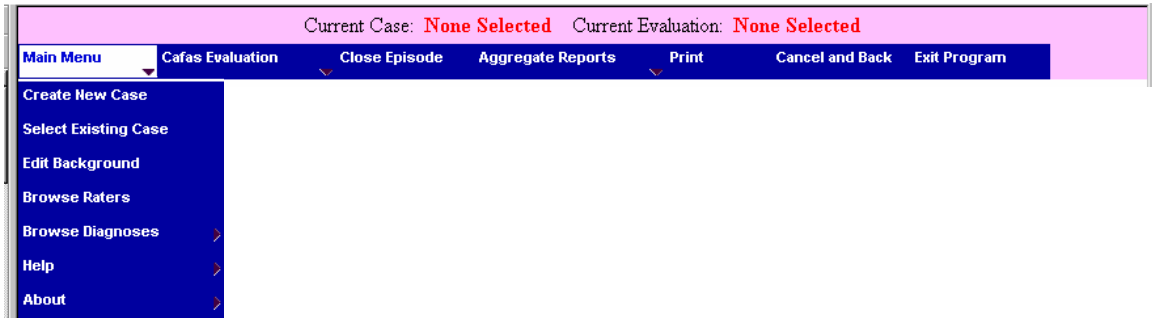
The aggregate reports are generated from within the CAFAS software.

## 1. To Access the Software



Click on the CAFAS icon on your desktop. On the opening screen of the CAFAS software, select your site by clicking on the black arrow. Enter your password and click on the blue Click Here to Accept License Agreement bar. The Select Existing Case screen will appear.

On the Select Existing Case screen, notice the blue navigation bar at the top of the screen. It has several menu tabs, beginning with Main Menu on the left and ending with Exit Program on the right.




## 2. To Access On-Screen Help

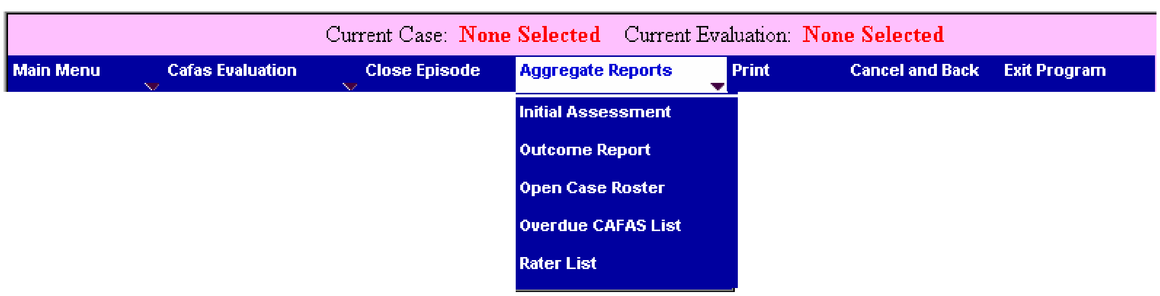
Click on Main Menu on the far left of the blue navigation bar. From the drop-down menu, click on HELP. You can access Navigation Tips and the CAFAS Software Manual from here.

## 3. To Enter A New Rater

To input a new rater or to check which raters have already been entered into the system, click on the Main Menu tab. From the drop-down menu, select Browse Raters.

On the Browse the Rater Files screen, check if your name and ID number are listed.

To enter a new rater, click on the Add button below the raters box. On the Adding/Changing a Rater Record screen, enter the Rater ID and Name of the rater.




## 4. To Print a Rater List

On the blue navigation, click on Aggregate Reports. From the drop-down menu, click on Rater List. On the Listing of Raters screen, click Print. This list is of all raters associated with this particular log-on.

## 5. To Produce a List of Next CAFAS Due

This is a report that lists the Next CAFAS dates entered on the Rate CAFAS screen.

Click on Aggregate Reports. From the drop-down menu, click on Open Case Roster. On the Open Case Roster screen, select the date range to view. Then click on CAFAS's Due Within Date Range. The raters name along with the client's name and the date for the next CAFAS will be listed. To print this report, click Print.

## 6. To Produce an Overdue CAFAS List

To produce a list of clients for whom the Next CAFAS Due date has passed without the next CAFAS being completed, click on Aggregate Reports. From the drop-down menu, click on Overdue CAFAS List. To print this report, click Print.

## 7. To Produce an Initial Assessment Report

To produce an aggregate report of all clients who have had an Entry CAFAS (T1) evaluation completed, click on Aggregate Report.

Select the admission date range for all client data that you wish to view. Click on Create Data for Report. Then click on View Initial Assessment Report. If you wish to print the report, click Print.

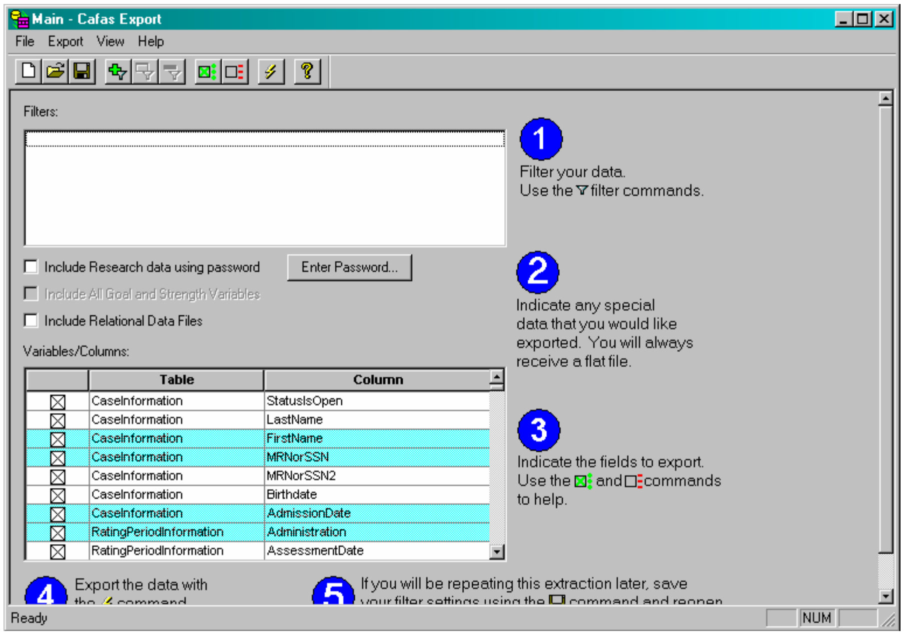
## 8. To Produce an Outcome Report.

This outcome report will provide aggregate information on all CLOSED cases with at least 2 CAFAS ratings. Only cases in which there is an Entry CAFAS (T1) and all 8 CAFAS scales assessing the youth are scored are included in this report.

Click on Aggregate Report. Then click on Outcome Report. On the Outcome Report screen, choose the start and end date of the admission date range for the outcomes you wish to view. Click on Create Data for Report. Then click on View Outcome Report.

## EXPORTING CAFAS DATA INTO EXCEL

The CAFAS Export Box is accessed through **Start - Programs - Cafas**. Click on Cafas Export.




## INSTRUCTIONS FOR EXPORTING CAFAS DATA

1. Click on the **Start** button. Select **Programs**, **CAFAS**, then **CAFAS Export**. The Main-CAFAS Export window will appear. (If you do not have this feature on your computer, it will be found on your server computer.)

2. Once you have accessed the Export window, click on the green cross and funnel icon on the taskbar at the top of the Export window. The Select Agency/Site box will appear.

3. In the Agency/Site box, enter **admin**

4. The password is **admin**.

5. Click **OK**.

6. The CAFAS Export Query Filter window will appear.

7. Select your filters. Here is an example:

   - In the Case Status box in the top left-hand corner, select **Both**
   - In the bottom Agency/Site box, select all sites containing client files that you wish to

examine (take care not to include your Junk and Training sites unless you specifically have a reason to include these)

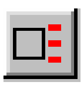
- In the top right-hand corner, click on **All Matching Cases**.

The Export Query Filter window will close and a Filter line will appear in the open white box in the CAFAS Export window.

8. Select your variables (variables refer to the information on a client):

- You will notice that the boxes to the left of the turquoise and white lines contain **X**'s indicating that the variables have been **default** selected.

If you would like to *customize* the variable selection to suit your own needs:



- Deselect all variables by clicking on the icon with the black box beside three red lines on the taskbar. The boxes will empty, allowing you to pick and choose the variables you want to export.

- Use the right hand scroll bar next to the turquoise and white lines to scroll through the list of variables.

- Select your choice of variables by clicking on the selection box (once a variable has been selected, an **X** will appear).

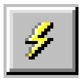
  **For example**:

  Of the Case Information variables, select:
  - LastName
  - FirstName
  - MRN  or SSN *  (this is the case ID number)
  - Birthdate
  - Admission Date

- Of the Rating Period Information variables, select:
  - Administration
  - AssessmentDate

- Of the Case Information variables that follow, select the following:
  - Sex
  - DaysSinceLastCafas

- Of the Rating Period Information variables that follow after the Background variables,
  select the following:
  - AdministrationOther
  - NextCafasDate
  - RaterID
  - RaterName



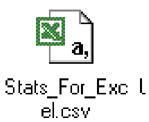
9. Now export your data by clicking on the thunderbolt icon on the taskbar.

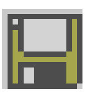
10. An <u>Exported Files</u> box will appear stating that your files have been exported successfully to the following location: **C:\Program Files\CAFAS**. (It is possible however that these exported files will go to another location so take careful note of the location listed.) Click **OK.**

11. You will access the exported files by following the path mentioned.

    For example, for **C:\Program Files\CAFAS**

    - Click on **My Computer** (icon will be on your desktop or accessed through your Start button in the bottom left-hand corner of your screen
    - Click on **Local Disc (C:)**
    - Click on **Program Files**
    - Click on **Cafas**
    - Click on **Stats_for_Excel.csv.** The Excel file will open**.**



13. If you want to do further work with this file, be sure to save this file with an appropriate name. These Stats files act as "holding tanks" and will be copied over on your next export procedure.

14. **I would highly recommend that you place a short-cut to the Stats_for_Excel.csv file on your desktop so that you can access you exported files quickly and easily.**

If you need any assistance with these instructions contact
**Nicole Benjamin de Perez at nicole.benjamindeperez@sickkids.ca**
**or call (416) 813-7654 ext 2636**