

TREATMENT PROVIDER USER MANUAL

Sex Offender Management Board Provider Data Management System

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HISTORICAL BACKGROUND

Background

The Colorado Legislature passed House Bill 16-1345 in June 2016. The bill mandates that the Sex Offender Management Board (SOMB) approved providers collect data about how their clients are treated, evaluated, and polygraphed. You can read a summary of the bill at <https://leg.colorado.gov/bills/hb16-1345>.

The bill requires SOMB to collect data from the evaluators, treatment providers, and polygraph examiners who provide services to adults and juveniles who have committed sexual offenses and are under the purview of the SOMB Standards and Guidelines. Service providers are required to submit standardized information about their service when they completed an evaluation, complete a full treatment program, or each time they complete a polygraph for each client.

The SOMB Provider Data Management System (Data System) website gathers the client information through a computerized tracking system. The individual provider's name and other information that can directly identify you is deleted or encrypted from the research data collected as part of the project. The system collects and uses data at an aggregate level administrative data. The data are not used to isolate individual provider data or outcomes.

To see the current SOMB standards go to:

<https://www.colorado.gov/pacific/dcj/somb-standards-bulletins>

NOTE: Your ID is protected.

Client data and outcome information cannot be linked to you as a provider.
Your individual identity not a part of statistical analysis of the data.

SOMB Information Sheet for Client Consent Form

The prerequisite for entering Client Service Tracking data is obtaining each client's consent to share the data with SOMB. That means each provider will need to create a Client Consent Form for each client. You can include the form as part of a Release and Disclosure form you already have, or create a new form. Feel free to use or adapt any of the suggested content for your own Client Consent form. If a client does not consent you can still enter and submit data, but it is not required. Contact the SOMB Administrator for guidance if you have questions about using or adapting this text.

What is the service tracking database? The Colorado Legislature passed House Bill 16-1345 in June of 2016. In the bill is a mandate for the SOMB to collect data from the evaluators, treatment providers, and polygraph examiners who evaluate, treat, and provide polygraph services to adults and juveniles who have committed sexual offenses per the SOMB Standards and Guidelines. The SOMB Provider Data Management System collects administrative data from evaluators, treatment providers, and polygraph examiners at the time of evaluation, treatment, and polygraph completion for each client.

Why is the data being collected? The SOMB will monitor how well the SOMB Standards and Guidelines are implemented, and provide protection for the community by reducing the likelihood of future sexual offending.

How does it affect providers? Generally, it doesn't. The individual provider's name and other information that can directly identify you will be deleted or encrypted from the research data collected as part of the project. The system collects and uses data at an aggregate level administrative data. The data are not used to isolate individual provider data or outcomes.

How does it affect clients? SOMB is collecting client court case ID. Only the statistical analyst will see your court case ID (no names or birthdays). The court case ID will be used to track future recidivism data. SOMB stores the data on a secured department server.

Why should clients agree to participate? By agreeing to participate, clients will help monitor and improve the quality of the evaluation, treatment, and polygraph process to make sure it closely follows the evidence-based Risk-Need-Responsivity (RNR) model. No negative consequences will occur because of participation.

Do clients have to participate? No, clients are not required to participate. Participation is completely voluntary. If clients agree to participate, they can always change their mind and withdraw. They will experience no negative consequences, whatever they decide.

Who should clients contact for questions? Clients can talk to their treatment provider, or contact Yuanting Zhang at 303-239437 or at yuanting.zhang@state.co.us

Quick Start Overview

- 1- **Confirm Your Account.** When you are accepted as a SOMB provider, you will receive a letter with your username and a link to instructions for establishing your password and confirming your account. After your account is confirmed, you will be able to login to the SOMB Data System. Link is valid for 120 hours (5 days).
- 2- **Login.** Go to the SOMB Data System at <https://sombproviders.state.co.us/>

The SOMB Data System has two main modules for Client Service Providers:

- A. **MY INFO:** View the information available about your services. This module has limited add, edit, or delete functions.
- B. **SERVICE TRACKING:** Add, edit, and delete data, download a PDF of data entered, submit data.

- 3- **Access the MY INFO module.**

Tabs and Topics in MY INFO Module

TAB	TOPIC	READ-ONLY / AVAILABLE FOR EDIT
Provider Info	General Information	Read-only except Additional Languages Spoken
Addresses	Agency, Address, Contact Information	Available for edit
Counties	Counties you provide services within	Available for edit
Services	Services you offer to SOMB clients	Read-only
Supervisors	Your SOMB supervisor(s)	Read-only
Licenses	Your professional licenses	Read-only
Contact Us	Email form to SOMB Administrator	Send email form

- 4- **Access the SERVICE TRACKING module.** Enter, edit, delete, and submit client service data. Download PDF of data entered.
 - A. Enter client information (Client ID, Consent Form, Court Type).
 - B. Enter service data in data entry tabs.

Data Entry Tabs and Topics for Treatment Providers

TAB	TOPIC	TAB	TOPIC
1	Referral source	9	Treatment Setting
2	Demographic information	10	Levels of Risk
3	Adjudication/Conviction	11	Match Treatment to Risk Level
4	Previous Sex Offense Treatment	12	Identify Client Needs
5	Adjunct Treatment	13	Address Client Needs
6	Mode of Treatment	14	Client Responsivity
7	Treatment Session Frequency	15	Treatment Dates
8	Level of Denial	16	Outcome Information

5- Submit Data to SOMB Data System Administration. After you submit data, you will not be able to edit your responses. You will have to contact the SOMB Data System Administrator to make changes. (email: yuanting.zhang@state.co.us)

GETTING STARTED

Computing Requirements

The SOMB Data System website is compatible with most modern browsers. However, browsers have varying levels of compliance with Internet standards, so there may be variations in how screens display and how functions work. This system is compatible with Windows 7 and later.

Here is an incomplete list of browsers that that should work well with the SOMB DMS.

- ✓ Internet Explorer 6 and later
- ✓ Microsoft Edge
- ✓ Firefox 5.x and later
- ✓ Google Chrome (preferred)

Points to consider:

Chrome is the recommended browser for the SOMB Data System whether you use a MAC or a PC. Using other browsers could negatively affect the performance of the data collection functions, especially on Apple computers.

NOTE: Chrome is the only browser that SOMB or the Colorado Office of Information Technology supports.

- **The system is programmed for optimal use on a PC.** Mac users may encounter irregularities in how the program works.
- **Keep your computer system current.** Updated computer hardware and software help the program function smoothly.
- **Firewalls may interfere with system performance.** Check with your IT department (or your owner's manual) on how to change your computer settings to resolve firewall issues.

Confirm Your Account

Before you can access the SOMB Data System, you must first apply to become an approved SOMB provider. For more information about SOMB, go to <https://www.colorado.gov/pacific/dcj/sex-offender-management-unit>

After your application is accepted, the SOMB Data System Administrator sends an email with your assigned username and a link to confirm your account. The link will be active for 120 hours (5 days) after the email is sent. Click the link and follow the instructions to confirm your account, establish a password, and access the SOMB Data System for data entry.

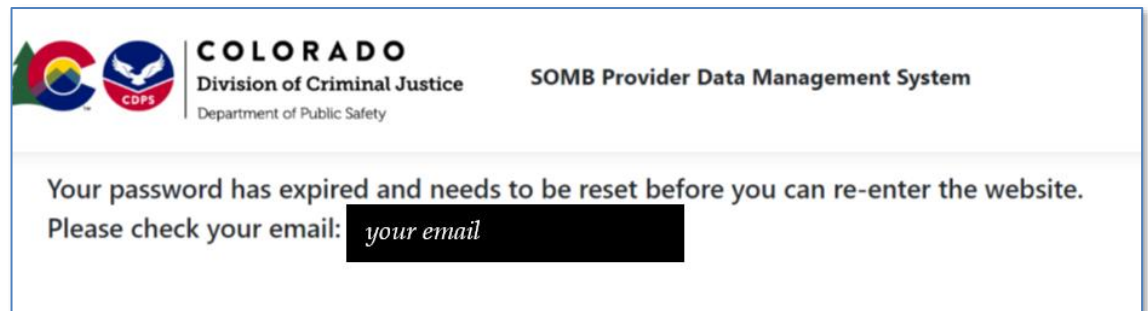
Please NOTE!

You must use the link in the email within 120 hours (5 days) after receiving the confirmation email.

After 120 hours, the link becomes invalid. If you attempt to use the link after it is invalid, you'll receive a message to contact the SOMB Administrator. The Administrator will send another confirmation email with a refreshed link. Click the refreshed link to confirm your account, establish a password, and access the SOMB Data System for data entry. As with the first link, the refreshed link is valid for 120 hours. Click the link to confirm your account, establish a password, and access the SOMB Data System for data entry.

Passwords

The password you establish when you confirm your account expires in 90 days. When you login on the 91st day, the system sends a message:



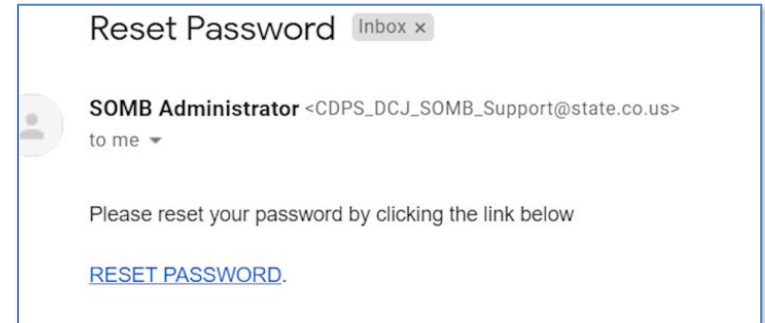
Check your email for a message from SOMB Administrator. The email will contain a link to reset your password. Click the link and follow the instructions.

Requirements for a password:

- Must have at least 8 characters
- Must have at least one lower-case letter
- Must have at least one upper-case letter
- Must contain at least one number
- Must contain at least one special character (like: * \$, !)

If you have trouble using your password, it may be because of a security protection issue. Contact yuanting.zhang@state.co.us for assistance.

After you reset your password, you can login to the SOMB Data System website.



Text Conventions

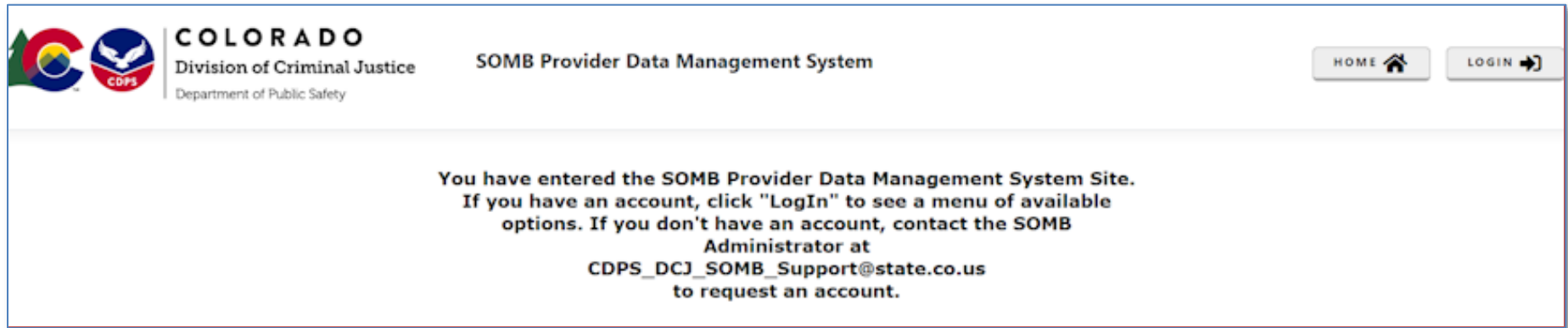
- Bold** Tab names, file names, popups, dashboards (Provider Info tab)
- Italic* Your input (your *Password*)
- ALL CAPS** Modules and acronyms (MY INFO Module, SOMB)
- Button** Clickable button

NOTE:

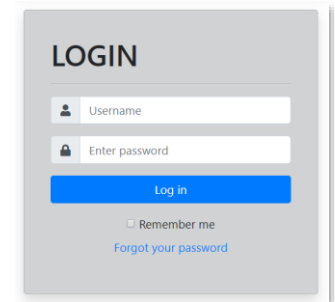
The information in screen graphics is fictitious and used as an example only.

Login to SOMB System

1- Open a browser window and go to <https://sombproviders.state.co.us/> The login screen displays this message:



- 2- Click **LOGIN** at the top right of the screen. The login popup appears.
- 3- Enter the *username* you received when you enrolled as a provider and the *password* you established when you confirmed your account.
 - Click **Remember me** if you want the system to remember your login information for a longer time.
 - If you need to retrieve your password, click **Forgot your password** and follow the directions given.

The screenshot shows a "LOGIN" popup form. It has a title "LOGIN" at the top. Below the title, there are two input fields: "Username" and "Enter password". Below the "Enter password" field is a blue "Log in" button. At the bottom of the form, there is a checkbox labeled "Remember me" and a link labeled "Forgot your password".

The **MY INFO** Dashboard appears with the **Provider Info** tab open. The data on the screen are fictional.

Most of the presented information is read-only and provided for your review. Contact the SOMB administrator (via the *Contact Us* tab) if any of the information is incorrect.

My Info

- Service Tracking
- SCSTS Background
- SCSTS Instructions

PROVIDER INFO | Addresses | Counties | Services | Supervisors | Licenses | Contact Us

Services Provided For: Adult, Juvenile

Next ADULT Expiration Date: Next JUVENILE Expiration Date:

Dora License(s): Registered Psychotherapist,xyz Date of Fingerprint:

Provider Status: Active Additional Languages Spoken: SPANISH X

Status Date:

UPDATE

If you don't see this screen, (1) click **MY INFO** in the left column, then (2) click the **Provider Info** tab.

NOTE: The system automatically logs you out after 60 minutes.

SOMB Providers Data Management System Website

The SOMB Data System website for Service Providers has two main modules that serve two different purposes:

MY INFO: Here you can view the information on file about you and your services. You can also change your address and contact information. Data in the module originates from your application to be a provider. It is provided for your convenience to verify accuracy. The SOMB Data System Administrator maintains this module, so notify the SOMB Data System Administrator if information changes in areas you can't edit. (email: yuanting.zhang@state.co.us)

SERVICE TRACKING: Here you can view, add, edit, delete, and submit data about your services. Enter and submit data for each client when you complete their full treatment. The data are identified with a Court Case ID.

The next section of the User Manual describes the MY INFO Module.

MY INFO MODULE

The **MY INFO** module contains information on file about you and your services. It's important to keep this information current because this is what SOMB clients see when they search the database for a provider. Most information is Read-only. The next sections discuss information contained in each of the following tabs on the MY INFO Dashboard and guide you in editing Additional Languages Spoken, Address, and County data.

TAB	TOPIC	READ-ONLY / EDIT
Provider Info	General Information	Read-only (except Additional Languages Spoken)
Addresses	Agency, Address, Contact Information	Available for edit
Counties	Counties you provide services within	Available for edit
Services	Services you offer to SOMB clients	Read-only
Supervisors	Your SOMB supervisor(s)	Read-only. Not all providers have a supervisor
Licenses	Your professional licenses on file	Read-only
Contact Us	Email form to SOMB Administrator	Send email form

The screenshot displays the 'My Info' dashboard with the 'PROVIDER INFO' tab selected. A notice at the top states: 'Most of the presented information is read-only and provided for your review. Contact the SOMB administrator (via the Contact Us tab) if any of the information is incorrect.' The interface includes a sidebar with 'My Info' and sub-items like 'Service Tracking', 'SCSTS Background', and 'SCSTS Instructions'. The main content area contains the following fields:

- Services Provided For:** Adult, Juvenile
- Next ADULT Expiration Date:** [Empty field]
- Next JUVENILE Expiration Date:** [Empty field]
- Dora License(s):** Registered Psychotherapist, xyz
- Date of Fingerprint:** [Empty field]
- Provider Status:** Active (dropdown menu)
- Additional Languages Spoken:** SPANISH (tagged with an 'x')
- Status Date:** [Empty field]

An 'UPDATE' button is located at the bottom left of the form area.

Tab - Provider Info

The **Provider Info** tab opens by default in the **MY INFO** dashboard. Click the **Provider Info** tab on the left if you can't see this screen. The following information is available in these data fields:

DATA FIELD	INFORMATION AVAILABLE	Read only/ For Edit
Services Provided For	Adult, Juvenile, Adult and Juvenile	Read-only
Next Adult Renewal Date	Due date for renewal for adult providers	Read-only
Next Juvenile Renewal Date	Due date for renewal for juvenile providers	Read-only
DORA License(s)	License(s) on file for Evaluator	Read-only
Date of fingerprints	Date fingerprints taken	Read-only
Provider Status	Active or inactive	Read-only
Additional Languages Spoken	Language(s) you speak	Available for Edit
Status Date	The date your current status was established - (Active or Inactive)	Read-only

The screenshot shows a web application interface for the 'PROVIDER INFO' tab. At the top, there are navigation tabs: 'PROVIDER INFO', 'Addresses', 'Counties', 'Services', 'Supervisors', 'Licenses', and 'Contact Us'. The main form area contains several input fields:

- Services Provided For:** A text input field containing 'Adult, Juvenile'.
- Next ADULT Expiration Date:** A text input field.
- Next JUVENILE Expiration Date:** A text input field.
- Date of Fingerprint:** A text input field with a calendar icon to its right.
- Provider Status:** A dropdown menu with 'Active' selected.
- Additional Languages Spoken:** A text input field with 'Select' written inside.
- Status Date:** A text input field with a calendar icon to its right.

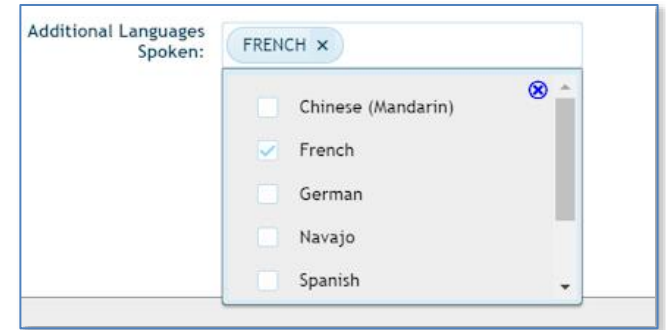
An 'UPDATE' button is located at the bottom left of the form area.

Edit Additional Languages Spoken

You can add or remove languages you speak in the **Additional Languages Spoken** data field.

1- Add Language(s):

- Click into the **Additional Languages Spoken** dropdown on the right side of the screen. A dropdown appears with the available languages to choose from.
- Click the language you want to add in the dropdown list. (If you speak a language that is not on the list, email SOMB Administrator yuanting.zhang@state.co.us to have it added.)
- Then click the blue circled 'x' or click outside the dropdown to exit the dropdown and add the language(s).



2- Remove Language(s):

- To delete one language (two methods):
 - a. Click the black x in the shaded circle around the language.
 - b. Click into the dropdown for **Additional Languages Spoken**. Then unclick the box beside the language name. Then click the blue circled 'x' to exit the dropdown.
- To clear all languages, click the black 'x' that appears in the top right corner of the **Additional Languages Spoken** field when the cursor is in the field.

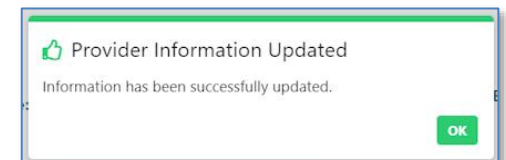
3- Click out of the dropdown to exit.

4- Click **Update** at the bottom of the screen. A "Please be Patient" popup might appear.

A Provider Information Updated popup appears with a message that the information was successfully updated.

5- Click **OK** on the popup.

This updates **Additional Languages Spoken**.



NOTE: The database system automatically saves your input.

Tab - Addresses

From the **MY INFO** dashboard, click the **Addresses** tab to view information on file about where you provide service. You can add, edit, or delete address information on this screen.

Addresses you have previously entered display below the column titles.

Agency	Address	City	Zip Code	Phone #	Phone Ext1	Email		
Counseling As...	1250 Help Lane	Canon ...	80001	(777) 222-4321		Counsel@Help...		
Best Mental H...	444 Chambers Cir...	Aurora	80001	(303) 555-5555		BestMental@H...		

ADD NEW RECORD

- 1- In the **Addresses** screen, click **Add New Record**. The **Add Record** popup screen appears.
- 2- Click into the data entry fields or the dropdowns and enter or select the appropriate information to fill in the information in the fields.

Add record

Agency:*

Address 1:*

Address 2:

City:* -- Select a City -- State:* CO Zip Code:* -- Select a Zipco..

Email Address:*

Phone Number1:* Phone Number2:

Active: True

The information needed in each data field is as follows:

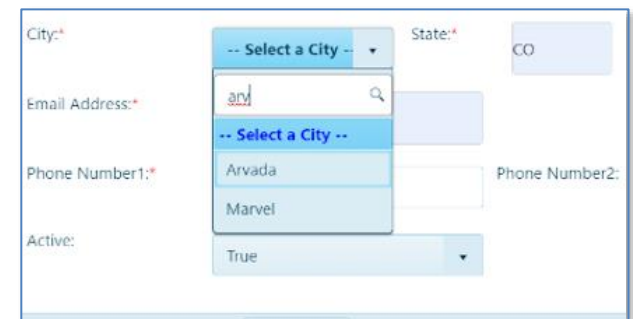
DATA FIELD	INFORMATION TO ENTER
Agency*	Enter the name of your Agency
Address 1*	Enter the street address
Address 2	Enter Suite/Room number, if applicable
City*	Select the city from the dropdown
State*	No action needed - Autofilled with Colorado abbreviation CO
Zip Code*	Select the appropriate Zip Code from the dropdown
Email Address*	Enter your primary business email
Phone Number1*	Enter the primary phone number
Phone Number2	Enter the secondary phone number, if applicable
Active	Select the Active or Inactive business status for this agency

* Asterisks indicate that data is required in that field.

HINT for Selecting from Dropdowns:

- In the **City** and **Zip Code** dropdown fields, begin typing the city or zipcode into the white search field. As you type, the options in the dropdown will narrow. Click one option in the blue option list to select.
- The information appears in the entry fields as you enter or select them. (The data in the example shown is fictional.)

3- Click **ADD** at the bottom of the screen to add the new address to the **MY INFO** screen.

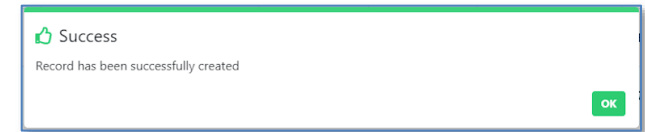
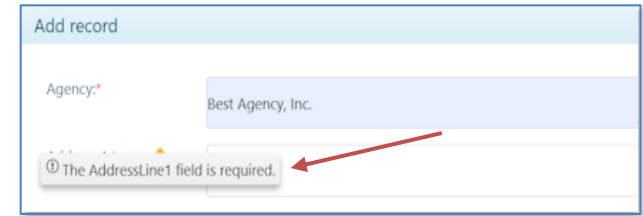


If required information is missing, a message appears beside the empty field.

- A. Enter the missing information in the required fields.
- B. Click **ADD**. The Success popup appears.

If all required information is present after edit, the Success popup with "Record has been successfully updated" message appears.

- 4- Click OK in the Success popup. The new address displays on the Addresses Tab screen.



EDIT an Address

- 1- In the **Addresses** tab screen, click the pencil icon to change your address information. The **Edit Record** popup appears. The data entry fields are the same as the **Add Record** popup.
 - Click into data entry fields for **AGENCY, ADDRESS 1 and 2, STATE, and PHONE 1 and 2** to change the information.
 - Click dropdowns for **CITY, ZIP, and ACTIVE** to change information.



- 2- Click **UPDATE** at the bottom of the popup to accept new information. The **Success** popup with "Record has been successfully updated" message appears if all required information is present.

As before, if required information is missing, a message appears beside the empty field.

- A. Enter the missing information in the required fields.
- B. Click **UPDATE**.

If all required information is present, the **Success** popup with "Record has been successfully updated" message appears.

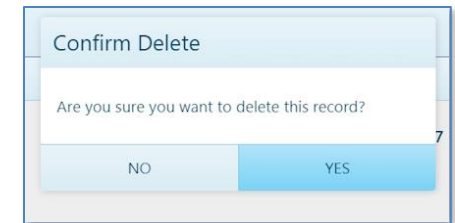
- 3- Click **OK** in the **Success** popup to update the information. Updated address information displays on the **Addresses** tab screen.

Delete an Address

- 1- In the **Addresses** screen, click the trashcan icon to remove an address. (You may need to scroll horizontally or change the size of the left panel to see the **DELETE** button.)

The **Confirm Delete** popup appears.

- 2- Click **YES** to delete the address
- or -
Click **NO** to exit the screen without deleting the address.



Tab - Counties

From the **MY INFO** dashboard, click the **Counties** tab to view information on file about the counties where you provide service. In this example, no information about counties is present in the system.

Two columns display: **Available Counties** and **Selected Counties**.

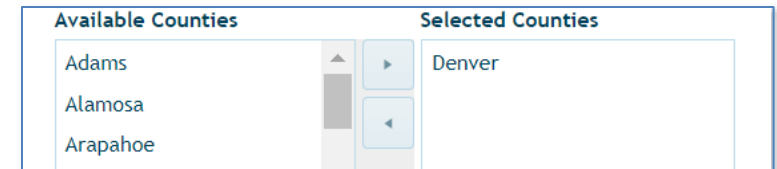
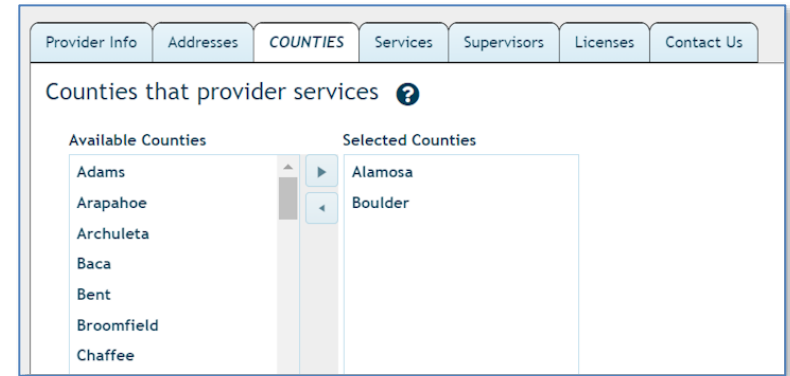
- **Available Counties** show all counties in Colorado.
- **Selected Counties** show which counties are on file for your services.

1- Click the circled black question mark on the screen to access the following instructions for Adding/Moving counties:

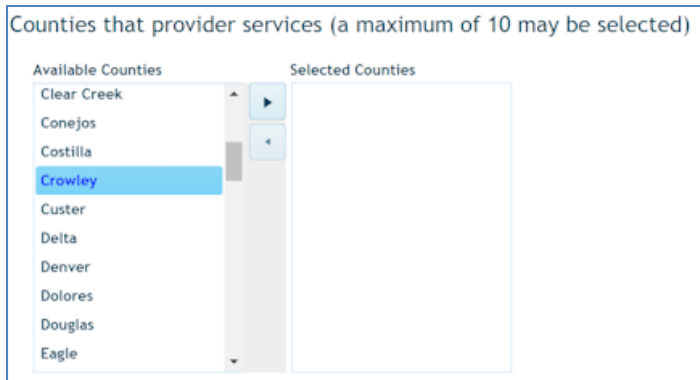
- To add a county, select a county from the "Available Counties" column and click the "Right-Arrow".
- To remove a county, select a county from the "Selected Counties" column and click the "Left-Arrow".
- Alternatively, if you double-click a county it moves from one column to the other.

2- Click the **OK** button on the popup to exit.

- The "Right-Arrow" and "Left-Arrow" between the columns move information between columns.
- The vertical scroll bar allows you to move through the list of counties to find the correct county.



The illustrations show how Crowley County moves from **Available Counties** into **Selected Counties**:



NOTE: You can move an unlimited number of counties into the **Selected Counties** column. However, you can only move one county at a time.

To move a county from the **Selected Counties** column back into the **Available Counties** Column, reverse the process:

- 1- Click to select the county in the **Selected Counties** column you wish to move back into the **Available Counties** column.
- 2- Click the top arrow pointing to the left in the middle of the screen on the right into the to the **Available Counties** column on the left. The county will move back into the **Available Counties** column.

OR

You can double-click a County to move it to the other column.

Tab - Services (Read-only)

From the **MY INFO** dashboard, click the **Services** tab to view information about the services you offer. You can have more than one service description.



Service Description	Offender Category	Service Status	Next Expiration Date	Supervisor
Treatment Provider - Full Level	Adult	Active		
Treatment Provider - Full Level	Juvenile	Active		
Evaluator - Full Level	Adult	Active		

Tab - Supervisors (Read-only)

From the **MY INFO** dashboard, click the **Supervisors** tab to view information about the supervisor(s) assigned to you.

This screen may be empty with a message that “No supervisor is required.” Follow the directions on the screen if you need to update information.



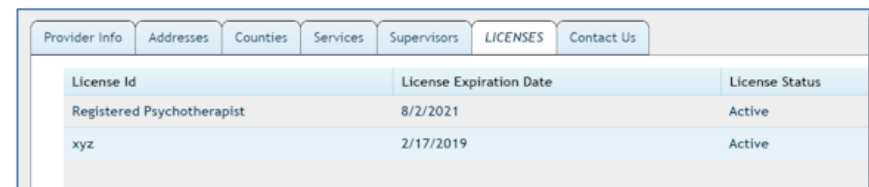
Most of the presented information is read-only and provided for your review. Contact the SOMB administrator (via the Contact Us tab) if you need to update this information.

Instructions: To update this information, complete a Supervision Agreement form available by clicking [HERE](#). Email Completed form to: CDPS_DCJ_SOMB_Support@state.co.us

Supervisor Name	Supervisor Email	Service Being Supervised
No supervisors are required.		

Tab - Licenses

From the **MY INFO** dashboard, click the **Licenses** tab to view information about your professional licenses. If you need to change any of the information about your licenses, use the email form in the **Contact Us** tab to contact the SOMB Data System Administrator.



License Id	License Expiration Date	License Status
Registered Psychotherapist	8/2/2021	Active
xyz	2/17/2019	Active

Tab - Contact Us

From the **MY INFO** dashboard, click the **Contact Us** tab.

- 1- If you wish to contact SOMB Data System Administration, click into the Subject line and enter the *subject* of the email. Entry into this field is required.

The box after "Send a copy to yourself?" should be autoselected. If you deselect the box, you will not receive a copy of the email.

- 2- Click into the Message field and enter *your message*. This field is required.
- 3- Click the **SEND EMAIL** button at the bottom of the screen. **Success** popup appears with the message "Email successfully sent."
- 4- Click **OK** in the Success popup. The **Contact Us** screen returns on the **MY INFO** dashboard.

Most of the presented information is read-only and provided for your review. Contact the SOMB administrator for more information.

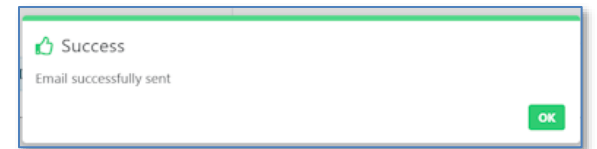
Provider Info | Addresses | Counties | Services | Supervisors | Licenses | **CONTACT US**

Subject*

Send a copy to yourself?

Message*

SEND EMAIL



**This is the last tab in the MY INFO Module.
The SERVICE TRACKING Module instructions that follow will guide through the process of
entering data for the clients you serve.**

SERVICE TRACKING MODULE

The SOMB Data System website for Service Providers has two main modules that serve two different purposes:

MY INFO: Here you can view the information on file about you and your services. You can also change your address and contact information. Data in the module originates from your application to be a provider. It is provided for your convenience to verify accuracy. Notify the SOMB Data System Administrator if your information changes. (email: yuanting.zhang@state.co.us)

SERVICE TRACKING: Here you can view and submit information about your interactions and outcomes with clients. Enter and submit the information for each client when you discharge the client, regardless of the outcome of treatment. The information is identified only with a Court Case ID.

This section of the User Manual describes the SERVICE TRACKING module.

When to Complete the Service Tracking Data Entry

Complete the online **SERVICE TRACKING** data entry for each client when you have finished the treatment and have discharged the client. Use the same client ID each time if you do multiple services for the same client. This data entry applies only to clients receiving services under the SOMB standards and then only if there was adjudication, conviction, or deferment. You are not required to report cases of pre-plea adjudication.

This User Guide will show you how to complete the data entry concerning treatment for SOMB clients you have assisted. At the end of all the data collection entry, you can edit Client Information and Service Tracking data.

CAUTION: Submit data only after you have completed entering and editing all data to your satisfaction. After you click the **SUBMIT** button, your data goes into the SOMB database system and is not available for editing or viewing.

If you need to make changes after the final submission or if you have any questions or issues with the online data entry process, please contact the SOMB Administrator at yuanting.zhang@state.co.us

THANK YOU for your assistance as a SOMB Service Provider!

Let's get started with the **SERVICE TRACKING** Module.

SERVICE TRACKING Dashboard

Click **SERVICE TRACKING** on the left side of the main SOMB Data System dashboard, if it is not open.

The section opens with the **Client Service Record Summaries** displaying client records you have already entered. If you have not yet entered client records, the records area will be blank.

Court Case ID	Client Consent	Court Type	Type	Created Date	Modified Date	Submitted Date	Record Actions
D0011932CR000000	Yes	Adult Crimi...	Treatment	11/19/2019	11/19/2019		Submit Export PDF >>
D0012019CR000899	Yes	Juvenile Co...	Treatment	11/20/2019	11/20/2019		Submit Export PDF >>

On the **SERVICE TRACKING** dashboard, two main sections display across the top screen. The section in use is white.






- **Client Service Record Summaries section.** This section opens first by default. Under this section, you create the client record that with general information about your client. The only identifying ID is a system-generated number that cloaks the personal identification of the client and you as the service provider to that client.
- **Selected Client Service Tracking Record Details (Review/Edit Answers) section.** Under this section, you enter and edit data about the treatment you provided for your client.

Buttons and icons across the screen represent the functions you will need to input data. The button for creating a new client service tracking record is above the Court Case ID rows.

[+ CREATE A NEW CLIENT SERVICE TRACKING RECORD](#)

The other function buttons are at the right end of the Court Case rows:

- Pencil icon - Edit client information

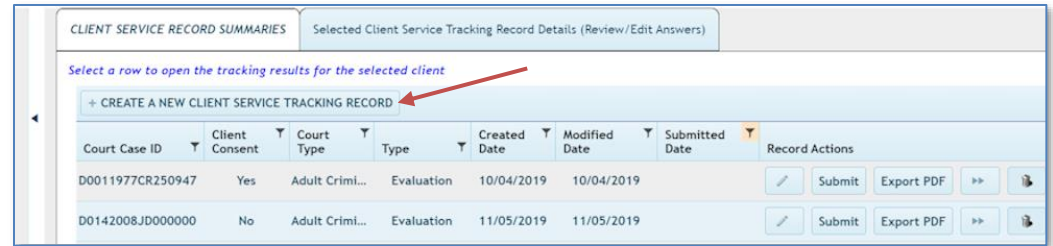
-  Submit a record to SOMB Administration
-  Download a record of the questions and your responses
-  Agency Transfer - Transfer the records to another person within your agency
-  Trashcan Icon - Delete a record
-  Funnel Icon - Opens search and filter options specifically for that column

NOTE: The information shown in this User Manual is fictional and used for example only.

The next section describes the process for adding a new Client Service Tracking Record.

Add a New Client Service Tracking Record

1- Click **Create A New Client Service Tracking Record**



The **Create New Service Tracking Record** Popup screen appears. Begin entering data to receive a system-generated Court Case ID for your client.

NOTE: The database system automatically saves your input, *except* for entered responses to “other” dropdown options.

2- Answer the question: Has the client voluntarily signed the required consent form to participate in this data collection?

- If you answer no, the system will fill in the next five fields with zeros. You may continue adding data into the Service Tracking module and submit for research purposes. **You are required to enter the last two questions in this section before submitting - “Court in which client was adjudicated/Convicted” and “Tracking Type”.** All other data entry is optional.
- If you answer yes, enter data in the next four fields to generate a Court Case ID.

Fields in the form:

- Has the client voluntarily signed the required consent form to participate in this data collection?
- Case Class
- County in which client was adjudicate/convicted
- Case Year
- Case Sequence
- Court Case ID
- Agency Client Id
- Court in which client was adjudicate/convicted
- Tracking Type

3- ***Case Class field:** Click the dropdown arrow and select CR, JD, or M or N/A if unknown.

- 4- ***County in which client was adjudicated/convicted:** Click the dropdown arrow and select the correct county or N/A if unknown.
- 5- **Case Year:** Enter the *year* the case was first assigned to the court or use the up/down arrows to navigate to the correct year.
- 6- **Case Sequence:** Enter *the series of up to six numbers* from the court docket.

***Note from SOMB Administrator:** “The N/A option has been added for the Case Class and County adjudicated/convicted; you can leave the case year and case sequence blank. If you do this, then the ID field will be all 0s. Then I will know that you have a consent client, but you could not get the court case ID”.

The SOMB Data System generates a Court Case ID in the next field.
Record this number for use if you treat this client again in the future.


Continue filling in the data entry fields.

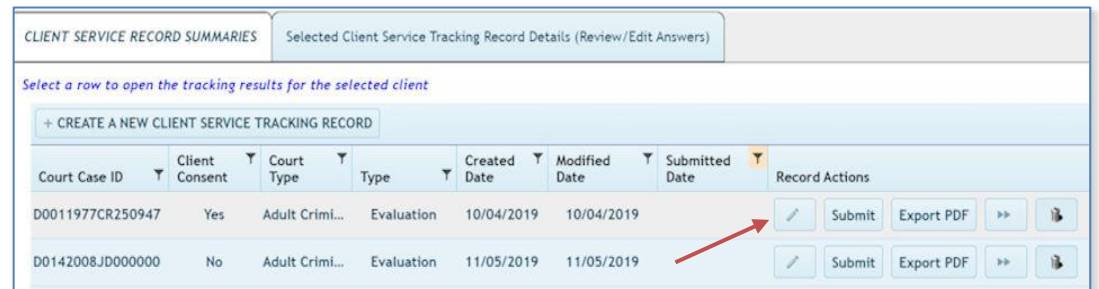
- 7- **Agency Client ID:** Enter the ID number your agency uses for identification. Not required but collected for ease of tracking.
- 8- **Required:** **Court in which client was adjudicated/convicted:** click the dropdown and select Adult Criminal Court or Juvenile Court.
- 9- **Required:** **Tracking Type:** Click the dropdown and select your role for the current client. More than one Tracking Type may appear.
- 10- Click **CREATE** to enter the information and create a new client record.
OR
Click **CANCEL** to exit the popup without adding the new client.

This completes the process for adding a Client Service Tracking Record.

The screen advances to **Selected Client Service Tracking Details Record** section with Tab 1 opens. To enter, edit, and submit data about the services you provided for your client, skip to the instruction for the next module.
To edit or review the Client Information you just entered, follow the instructions below.

Edit Client Information

- 1- Click the **Client Service Record Summaries Tab** to view the list of Court Case IDs. The full list of clients you have submitted displays, but are identified by their Court Case ID number only.
- 2- Locate the Court Case ID from the list for the client whose data you want to review or edit.
- 3- Click the edit icon  on the left side of the client row.



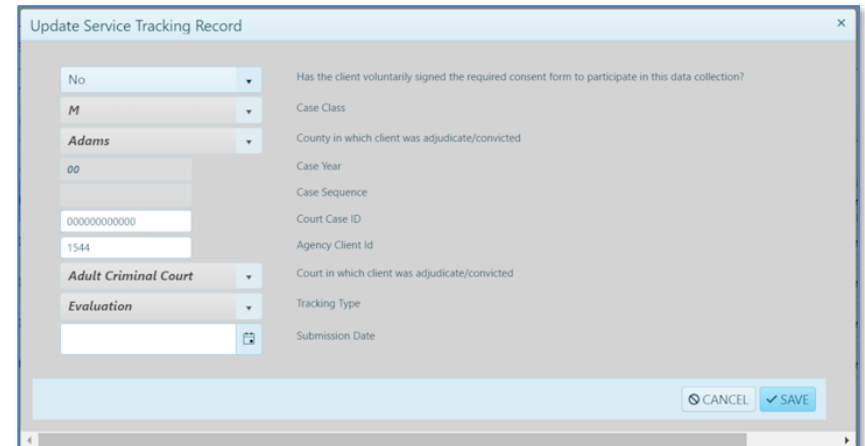
The screenshot shows the 'CLIENT SERVICE RECORD SUMMARIES' interface. At the top, there are two tabs: 'CLIENT SERVICE RECORD SUMMARIES' and 'Selected Client Service Tracking Record Details (Review/Edit Answers)'. Below the tabs, there is a prompt: 'Select a row to open the tracking results for the selected client'. A button labeled '+ CREATE A NEW CLIENT SERVICE TRACKING RECORD' is visible. The main area contains a table with the following columns: Court Case ID, Client Consent, Court Type, Type, Created Date, Modified Date, Submitted Date, and Record Actions. Two rows are visible in the table. The first row has Court Case ID 'D0011977CR250947', Client Consent 'Yes', Court Type 'Adult Crimi...', Type 'Evaluation', Created Date '10/04/2019', Modified Date '10/04/2019', and Record Actions including an edit icon, 'Submit', 'Export PDF', and other icons. The second row has Court Case ID 'D0142008JD000000', Client Consent 'No', Court Type 'Adult Crimi...', Type 'Evaluation', Created Date '11/05/2019', Modified Date '11/05/2019', and Record Actions including an edit icon, 'Submit', 'Export PDF', and other icons. A red arrow points to the edit icon in the Record Actions column of the second row.

Court Case ID	Client Consent	Court Type	Type	Created Date	Modified Date	Submitted Date	Record Actions
D0011977CR250947	Yes	Adult Crimi...	Evaluation	10/04/2019	10/04/2019		[Edit] [Submit] [Export PDF] [More]
D0142008JD000000	No	Adult Crimi...	Evaluation	11/05/2019	11/05/2019		[Edit] [Submit] [Export PDF] [More]

The **Update Service Tracking Record** popup containing client information displays on the screen. The popup contains the same fields as the **Create New Service Tracking Record** popup. Refer to instructions in that section if necessary.

Note that the Submit Date is blank. If the record had been submitted it would not appear on the case list and you would not be able to edit data.

- 4- Click into the data field or dropdown you wish to change and enter the new data.
- 5- Click **SAVE** in the popup then click **OK** in the Success popup.
OR
Click **CANCEL** to clear the edit.



The screenshot shows the 'Update Service Tracking Record' popup form. It contains several fields and dropdown menus. The fields are: 'No' (dropdown), 'M' (dropdown), 'Adams' (dropdown), '00' (text field), '000000000000' (text field), '1544' (text field), 'Adult Criminal Court' (dropdown), 'Evaluation' (dropdown), and a blank text field. The labels for these fields are: 'Has the client voluntarily signed the required consent form to participate in this data collection?', 'Case Class', 'County in which client was adjudicate/convicted', 'Case Year', 'Case Sequence', 'Court Case ID', 'Agency Client Id', 'Court in which client was adjudicate/convicted', 'Tracking Type', and 'Submission Date'. At the bottom right, there are two buttons: 'CANCEL' and 'SAVE'.

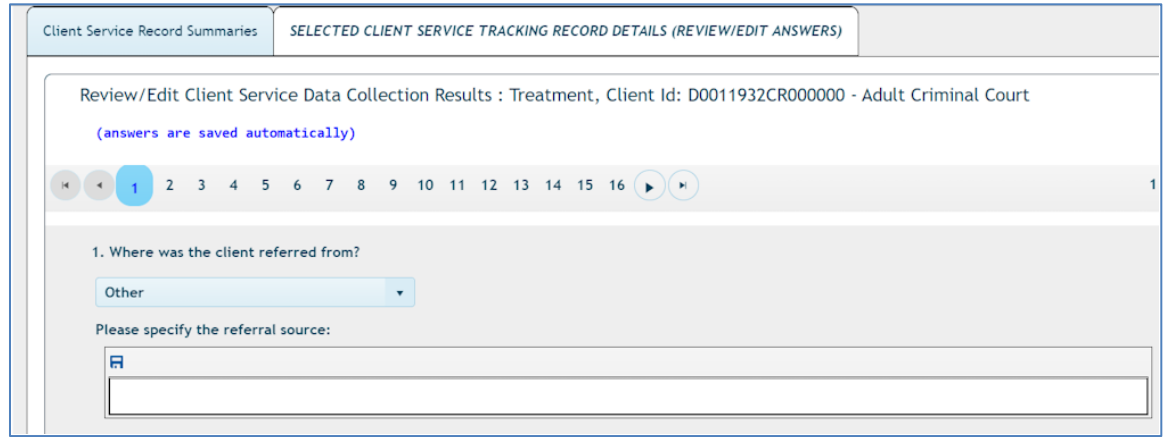
The screen advances to **Tab 1** in the **Selected Client Service Tracking Details Record** section. In this section, you enter, edit, and submit data about the services you provided for your client. Instructions for these processes begin in the next section.

This completes the process for creating and/or editing a new service tracking record.

Your next step is to enter data into the Selected Client Service Record Tracking Details tabs about the treatment you provided. Instructions for entering Service Tracking data are in the next section of this User Manual.

Dashboard - Selected Client Service Tracking Record Details

After you create a new client service tracking record, the screen opens to the **Selected Client Service Record Tracking Details** dashboard (top of screen shown). Notice that this main section label is now white. In this section, you enter and edit data, download data, and submit data about the services you provided for your client.



The screen has 16 data entry tabs where you enter Service Tracking information about your interactions with the client. Tab 1 is open by default. The Client ID, Tracking Type, and Court display above the data entry tabs as the document name. When you hover over each tab, a note displays the tab content and the complete/incomplete status of the tab.

Tabs and Topic are as follows:

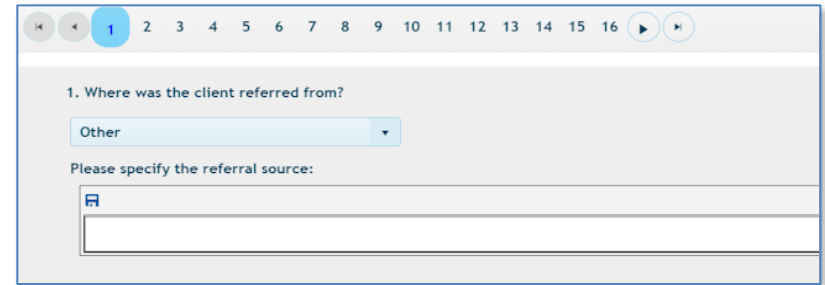
TAB	TOPIC	TAB	TOPIC	TAB	TOPIC
1	Referral source	6	Mode of Treatment	11	Match Treatment to Risk Level
2	Demographic information	7	Treatment Session Frequency	12	Identify Client Needs
3	Adjudication/Conviction	8	Level of Denial	13	Address Client Needs
4	Previous Sex Offense Treatment	9	Treatment Setting	14	Client Responsivity
5	Adjunct Treatment	10	Levels of Risk	15	Treatment Dates
				16	Outcome Information

The following sections discuss the data entry needed for each tab. You don't have to enter data in any particular tab order. The SOMB Data System saves your responses automatically, *except* for entered responses to "other" dropdown options.

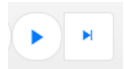
Enter Client Service Tracking Data

Tab 1 - Referral Source

- 1- Click Tab 1 to open Question 1: **Where was the client referred from?**
- 2- Click the dropdown arrow in Tab 1 and select an option from the referral sources.
- 3- If you select other, enter the name of the other referral source in the data entry field that appears. Click the blue save icon to submit your response.



HINT:

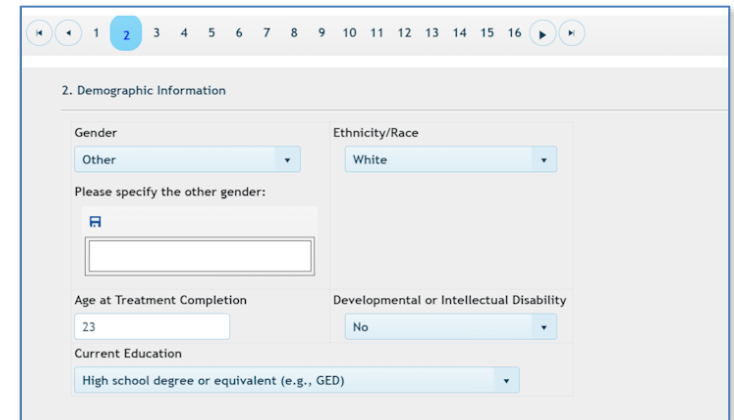


Click the arrows on the right or left of the tab bar to move through the tabs. The outside arrows (with the vertical line) go to the first or last tab. The single arrows advance or retreat by one tab per click.

HINT: You can collapse the left panel to make more room for the data entry panel on the right by clicking the small arrow between the right and left panel.

Tab 2 - Demographic Information

- 1- Click Tab 2 to open Question 2: **Demographic Information.**
- 2- Click the dropdown arrow under **Gender** and click answer to select. If you select “other,” *enter your response* in the data field and click the blue icon to save.
- 3- Click the dropdown arrow under **Ethnicity/Race** and click answer to select.
- 4- Click into **Age at Treatment Completion** field and enter a *numerical age*.
- 5- Click the **Developmental or Intellectual Disability** dropdown arrow and click answer to select.
- 6- Click the **Current Education** dropdown arrow and click answer to select.

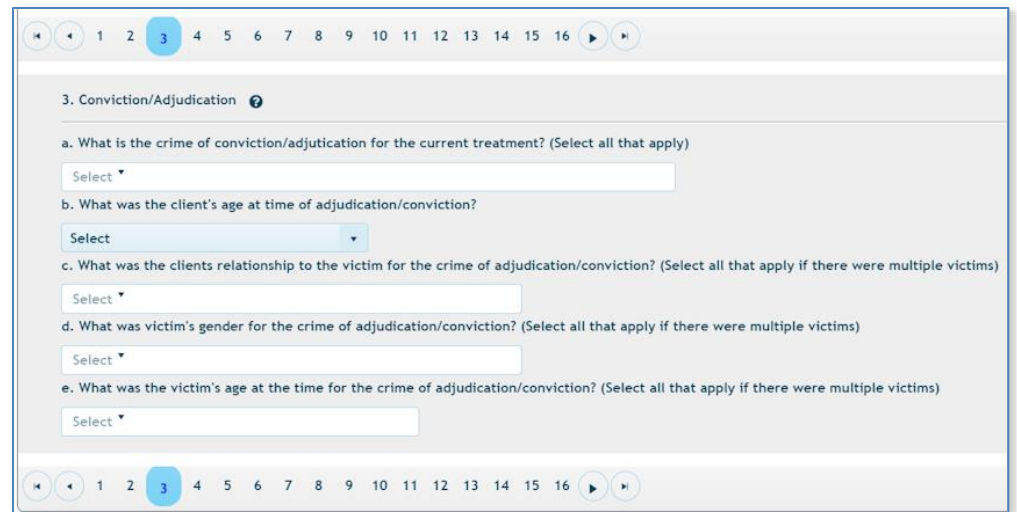


Tab 3 - Adjudication/Conviction

- 1- Click Tab 3 to open Question 3:
Conviction/Adjudication. Five questions with dropdowns display. A small black and white question mark appears to the right of the question.
A- Click the small question mark and read the text that appears about Victim Choices Information.
B- Click **OK** in the Victim Choices Information text field.

Then proceed with the questions under Tab 3.

- 2- Question a. **What is the crime conviction/adjudication for the current treatment?** Click the dropdown arrow and select an answer. If the answer does not appear on the dropdown, select “Other”. A data entry field will appear. Enter *your answer* and click the blue save icon to record your response.
- 3- Question b. **What was the client’s age at the time of adjudication/conviction?** Click the dropdown and select the appropriate age range.
- 4- Question c. **What was the client’s relationship to the victim for the crime of adjudication/conviction?** Click the dropdown arrow and select an answer. Select all answers that apply if there were multiple victims, including all victims in the referral charges, not other past identified victims.
- 5- Question d. **What was the victim’s gender for the for the crime of adjudication/conviction?** Click the dropdown arrow and select an answer. Select all answers that apply if there were multiple victims.
- 6- Question e. **What was the victim’s age at the time for the crime of adjudication/conviction?** Click the dropdown arrow and select an answer. Select all that apply if there were multiple victims.



The screenshot shows a digital form titled "3. Conviction/Adjudication" with a question mark icon. It contains five questions, each with a "Select" dropdown menu. Question a asks for the crime of conviction/adjudication. Question b asks for the client's age at time of adjudication/conviction. Question c asks for the client's relationship to the victim. Question d asks for the victim's gender. Question e asks for the victim's age at the time of the crime. The form is part of a multi-page interface, with a navigation bar at the top and bottom showing tabs 1 through 16, with tab 3 highlighted.

HINT: Move to a different page with the arrows at the bottom of this page.

Tab 4 - Previous Sex Offense Specific Treatment

- 1- Click Tab 4 to open Question 4: **Has the client previously been in the Specific Sex Offense Treatment?**
- 2- Click the dropdown and select either YES or NO.
- 3- *If you answer YES*, click the second dropdown that appears and answer YES or NO to the question: **Did you utilize the discharge summary from the previous treatment provider in your current treatment plan?**
If you answer NO, the second dropdown will not appear.

Tab 5 - Adjunct Treatment

- 1- Click Tab 5 to open Question 5: **Was adjunct treatment (e.g. mental health, trauma) utilized during the treatment?"**
 - A table with 3 columns appears (from left to right):
 - Adjunct Treatment (Mental Health, Trauma, Substance use, Grief/Loss, other)
 - Other Treatments before the current Sex Offense Specific treatment.
 - Treatment Since the Current Treatment.
 - Columns 2 and 3 have dropdowns with YES and NO options aligned with Adjunct Treatment methods. **Bulk Answer** at the top of the column changes all answer in the column to either YES or NO.

Adjunct Treatment	Other treatments before the current Sex Offense Specific treatment	Treatment since the current treatment
Bulk Answer	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Mental Health	No	No
Trauma	No	No
Substance Use	No	No
Grief/Loss	No	No
Other	No	No

- 2- For each Adjunct Treatment, click the dropdown in the "Other Treatments before the current Sex Offense Specific treatment" column and select either Yes or No.
If you select Yes in "other", enter the *other treatment* in the answer box that appears. Click the save icon above the data entry field to save your answer.

Tab 6 - Mode of Treatment

1- Click Tab 6 to open Question 6: **What was the mode of the treatment sessions(s) (choose all that apply) and the average length and average number of participants in the group session?**

- A table with 3 columns appears: 1) Treatment Mode 2) Session Duration column with dropdown boxes 3) Average Group size with dropdown boxes
- Other Mode Description with a data entry field appears below the columns.

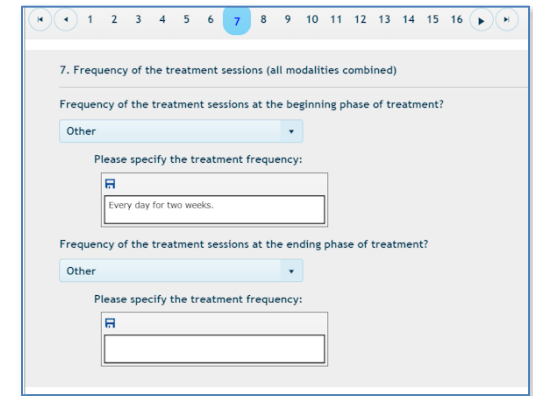
Treatment Mode	Session Duration	Average Group Size
Close-ended Group	N/A	N/A
Open-ended Group	N/A	N/A
Individual	Less than 1 hour	N/A
Family	Less than 1 hour	N/A
Psycho-social and skills building	N/A	N/A
Other	N/A	N/A

Other Mode Description
Required

- 2- For each item in the Treatment Mode column, click the dropdown in Session Duration and select an approximate length of time or N/A.
- If you select "other", *enter your response* in the comment field that appears and click the blue icon to save your answer.
- 3- For each item in the Treatment Mode column, click the dropdown in Average Group Size and select the appropriate range of participants or N/A. Individual and Family Treatment Modes do not offer dropdown or data entry options.
- 4- Click into the "Other Mode Description" data entry field and enter a *description of another possible treatment mode* and click the blue icon to save your answer.

Tab 7 - Treatment Session Frequency

- 1- Click Tab 7 to open Question 7: **Frequency of the treatment sessions**. Two questions with dropdown boxes appear below Question 7.
- 2- Click the dropdown below the first question and select the answer to the question: **Frequency of the treatment sessions at the beginning phase of treatment**. If your answer is “Other,” enter your response in the data entry field and click the blue save icon.
- 3- Click the dropdown below the second question and select the answer to the question: **Frequency of the treatment sessions at the ending phase of treatment**. If your answer is “Other,” enter your response in the data entry field and click the blue save icon

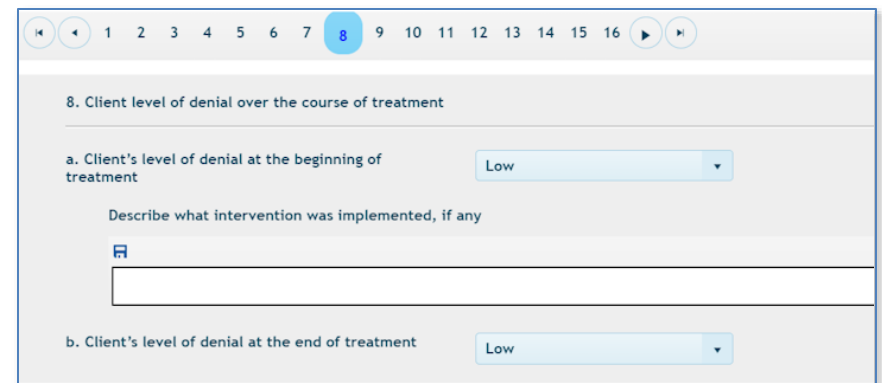


The screenshot shows a software interface for Question 7. At the top, there is a navigation bar with tabs numbered 1 through 16, with tab 7 highlighted. Below the navigation bar, the question title is "7. Frequency of the treatment sessions (all modalities combined)". The first question is "Frequency of the treatment sessions at the beginning phase of treatment?" with a dropdown menu set to "Other". Below this is a text entry field with a blue save icon and the text "Every day for two weeks." The second question is "Frequency of the treatment sessions at the ending phase of treatment?" with a dropdown menu set to "Other" and an empty text entry field with a blue save icon.

Tab 8 - Level of Denial

NOTE: This question is only for adult clients: Skip to Tab 9 if your client is a Juvenile.

- 1- Click Tab 8 to open Question 8: **Client level of denial over the course of treatment**. Three questions appear:
 - a. Client's level of denial at the beginning of treatment (with dropdown).
 - Describe what intervention was implemented, if any (with data entry field for description).
 - b. Client's level of denial at the end of treatment (with dropdown).
- 2- Click the dropdown arrow and click to select Low, Moderate, or High for questions a. and b. Click the blue circled "x" that appears in the top right corner of the dropdown to close the list.
- 3- Enter your *description* of your intervention into the data field that appears between the questions. Click the blue icon to save your response.



The screenshot shows a software interface for Question 8. At the top, there is a navigation bar with tabs numbered 1 through 16, with tab 8 highlighted. Below the navigation bar, the question title is "8. Client level of denial over the course of treatment". The first question is "a. Client's level of denial at the beginning of treatment" with a dropdown menu set to "Low". Below this is a text entry field with a blue save icon and the text "Describe what intervention was implemented, if any". The second question is "b. Client's level of denial at the end of treatment" with a dropdown menu set to "Low".

Tab 9 - Treatment Setting

- 1- Click Tab 9 to open Question 9: **What was the treatment setting for the current discharge for treatment?**
- 2- Click the dropdown and select all applicable answers.

If you select "other" enter *your response* in the comment field that appears and click the blue icon above the box to save your answer.

Tab 10 - Levels of Risk

- 1- Click Tab 1 to open Question 10: **What are the identified levels of risk or protective factors based on validated risk assessment instrument?** (Illustration shows the top of the screen.)

Below the question are two tabs: Adult Assessment Instruments and Juvenile Assessment Instruments.

- Below each tab is a table with three columns: **Instrument, Score and Risk Level at Beginning of Treatment, and Score and Risk Level at End of Treatment.**

Risk Instrument (Static and Dynamic Tools)	Beginning of Treatment		End of Treatment	
	Score	Risk Level	Score	Risk Level
SOTIPS ⓘ	Enter Number	Select	Enter Number	Select
STATIC 99 R or 2002R ⓘ	Enter Number	Select	Enter Number	Select
VASOR or VASOR 2 ⓘ	Enter Number	Select	Enter Number	Select
VRAG or VRAG-R	Enter Number	Select	Enter Number	Select

HINT: Click the black question marks to the right of SOTIPS, STATIC 99r, 2002r, and VASOR or VASOR 2 to see the criteria for those tools.

- Below the table are two more questions with dropdown boxes: "Beginning treatment overall risk assessment" and "End treatment overall risk assessment" Use the scroll bar to view all questions. (Illustration shows the bottom of the screen.)

2- Choose the applicable tab (Adult or Juvenile) for your hypothetical client.

- Scroll down to see all instrument(s) in the Instrument column.
- Choose instruments you use to assess a client. The list of instruments will vary depending on your choice.

3- In the same row as each instrument, enter a score from the instrument used and select a level of risk for that score from the dropdown.

- If applicable, enter *other instruments you might use* in the "Other Instrument Description data entry field below the table."
- Note that not all instruments for juveniles will have a risk score.

4- Scroll down to the two questions at the bottom of the table. Click in each dropdown and enter your overall risk assessment for the client:

- At the beginning of treatment.
- At the end of treatment.

NOTE: You can advance to other tabs from the bottom of the Tab 10 screen.

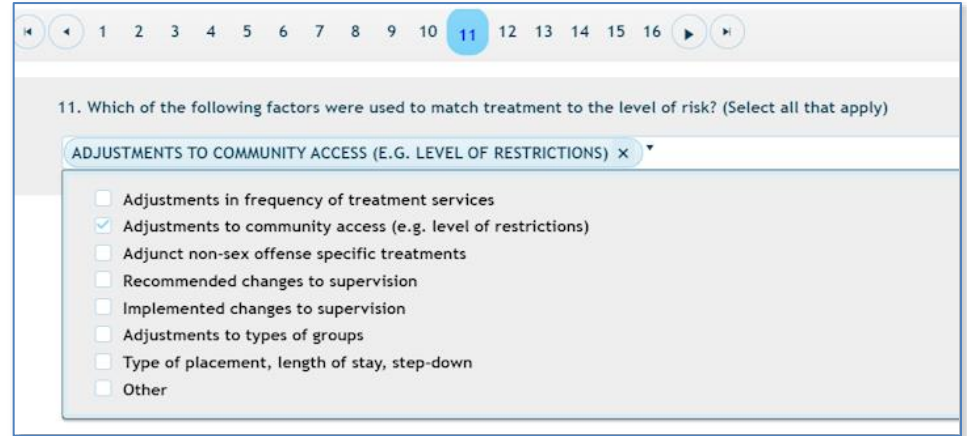
Tab 11 -Match Treatment to Risk Level

- 1- Click Tab 11 to open Question 11: **Which of the following factors were used to match treatment to the level of risk?** (Select all that apply).

A dropdown box appears below the question.

- 2- Click the dropdown and select all applicable answers.

If you select "other" enter *your response* in the comment field that appears and click the blue icon above the box to save your answer. Click the circled "x" that appears in the top right corner of the options list to exit the dropdown.



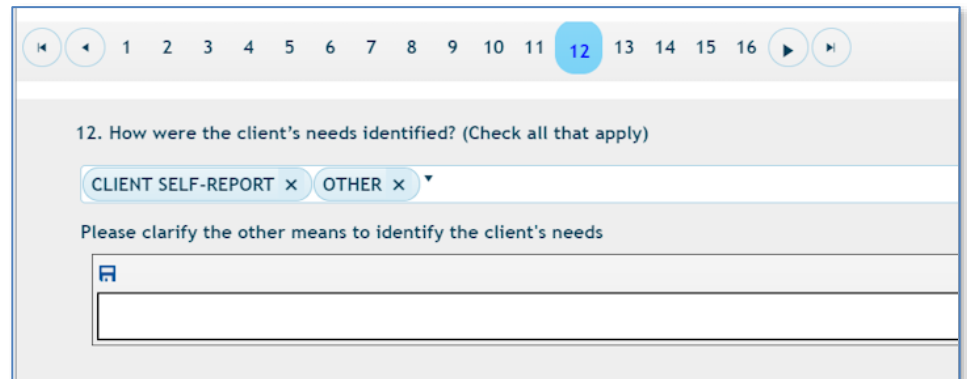
The screenshot shows a navigation bar at the top with tabs 1 through 16, where tab 11 is highlighted. Below the navigation bar is the question text: "11. Which of the following factors were used to match treatment to the level of risk? (Select all that apply)". A dropdown menu is open, showing the selected option "ADJUSTMENTS TO COMMUNITY ACCESS (E.G. LEVEL OF RESTRICTIONS) x". The dropdown list contains the following options with checkboxes: "Adjustments in frequency of treatment services", "Adjustments to community access (e.g. level of restrictions)" (checked), "Adjunct non-sex offense specific treatments", "Recommended changes to supervision", "Implemented changes to supervision", "Adjustments to types of groups", "Type of placement, length of stay, step-down", and "Other".

Tab 12 -Identify Client Needs

- 1- Click Tab 12 to open Question 12: **How were the client's needs identified?**

- 2- Click the dropdown and select all applicable answers.

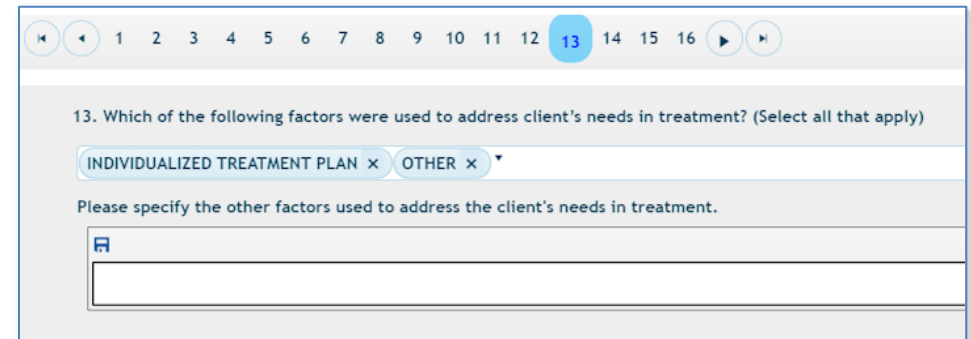
If you select "other," enter *your response* in the comment field that appears and click the blue icon above the box to save your answer. Click the circled "x" that appears in the top right corner of the options box to close the list.



The screenshot shows a navigation bar at the top with tabs 1 through 16, where tab 12 is highlighted. Below the navigation bar is the question text: "12. How were the client's needs identified? (Check all that apply)". Two dropdown menus are open, showing the selected options "CLIENT SELF-REPORT x" and "OTHER x". Below the dropdowns is the instruction "Please clarify the other means to identify the client's needs" followed by a text input field with a blue save icon above it.

Tab 13 -Address Client Needs

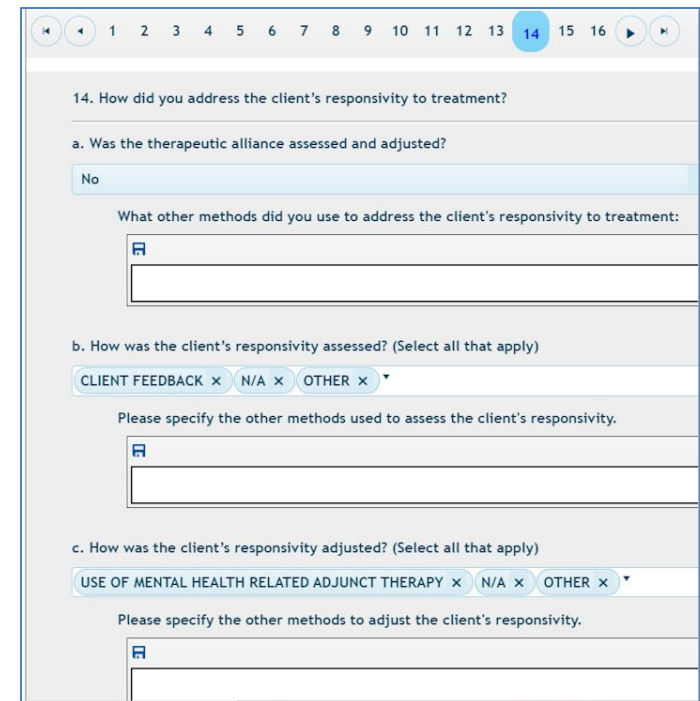
- 1- Click Tab 13 to open Question 13: **Which of the following factors were used to address the client's needs in treatment?**
- 2- Click the dropdown and select all applicable answers. If you select "other," *enter your response* in the comment field that appears and click the blue icon to save your answer. Click the circled "x" that appears in the top right corner of the options box to close the list.



The screenshot shows a navigation bar at the top with tabs 1 through 16, where tab 13 is highlighted. Below the navigation bar, the question text reads: "13. Which of the following factors were used to address client's needs in treatment? (Select all that apply)". There are two selected options: "INDIVIDUALIZED TREATMENT PLAN" and "OTHER". Below the options, there is a text input field with a blue save icon and a blue "x" icon in the top right corner.

Tab 14 -Client Responsivity

- 1- Click Tab 14 to open Question 14: **How did you address the client's responsivity to treatment?**
Three questions with dropdowns boxes appear below Question 14.
- 2- Question a. **Was the therapeutic alliance assessed and adjusted?**
 - Select the applicable answer from the dropdown.
 - If you choose "No", enter *your response* and click the blue icon to save.
- 3- Question b. **How was the client's responsivity assessed?**
 - Select all applicable answer(s) from the dropdown.
 - If you choose "other", enter *your response* and click the blue icon to save.
- 4- Question c. **How was the client's responsivity adjusted?** (select all that apply).
 - Select the applicable answer(s) from the dropdown. If you choose "other," enter *your response* and click the blue icon to save.



The screenshot shows a navigation bar at the top with tabs 1 through 16, where tab 14 is highlighted. Below the navigation bar, the question text reads: "14. How did you address the client's responsivity to treatment?". There are three sub-questions: a, b, and c. Sub-question a has a dropdown menu with "No" selected. Sub-question b has a dropdown menu with "CLIENT FEEDBACK", "N/A", and "OTHER" selected. Sub-question c has a dropdown menu with "USE OF MENTAL HEALTH RELATED ADJUNCT THERAPY", "N/A", and "OTHER" selected. Each sub-question has a text input field with a blue save icon and a blue "x" icon in the top right corner.

Tab 15 -Treatment Dates

1- Click Tab 15 to open Question 15: **Treatment Dates (must be in sequence)**. Two columns appear with blanks for treatment dates.

Dates requested for adult treatment are:

- Description and Date. Includes Current treatment started, Maintenance or After-Care started (if applicable) and Current Treatment Discharge.
- Calendar icons appear in the Date column after the three descriptions.

Dates requested for juvenile treatment are:

- Current Treatment Started
- Current Treatment Discharge

2- Click the calendar icons and navigate to the appropriate dates. Click to select dates for each treatment category.

15. Treatment Dates (must be in sequence)

Description	Date
Current Treatment Started	11/5/2019
Maintenance or After-Care Started (if applicable)	
Current Treatment Discharge	11/19/2019

15. Treatment Dates (must be in sequence)

Description	Date
Current Treatment Started	12/2/2019
Current Treatment Discharge	12/16/2019

Tab 16 -Outcome Information

1- Click Tab 16 to open Question 16: **Outcome Information**. Four questions appear with dropdowns for responses. Use the dropdowns to select the appropriate answer to the four questions.

2- Question a. **Type of Discharge**.

3- Question b. **Select Improvements in the quality of life**. Select all that apply.

4- Question c. **What barriers to progress were identified during the course of treatment?** Select all that apply.

5- Question d. **What recommendations were made to overcome identified barriers?** Select all that apply.

If for any of the questions, you select "other" enter your response and click the blue icon to save. Click the circled "x" that appears to close the list.

16. Outcome Information

a. Type of discharge
Unsuccessful - Non-compliance discharge
Select the reasons for unsuccessful completion, if applicable.
Select

b. Select Improvements in the quality of life (Select all that apply)
NONE (THE QUALITY OF LIFE DID NOT IMPROVE OVER THE COURSE OF TREATMENT) x

c. What barriers to progress were identified during the course of treatment? (Select all that apply)
NONE x

d. What recommendations were made to overcome identified barriers? (Select all that apply)
HOUSING/EMPLOYMENT x

SUBMIT

This completes the data entry portion of the SOMB Data System.

The system recorded and saved your responses automatically as you advanced through the tabs, except for entered responses to “other” dropdown answers.

The next section describes how to download (export) data, edit, and submit data.

Laptops and Tablet Screens

Providers who use small tablet or laptop screens might not be able to see the function buttons on the right side of the viewing screen. The answer lies in either collapsing or reducing the panel on the left side of your screen to reveal the buttons on the right:

- A. Click and drag the arrow on the panel border to collapse or expand the left panel.
- B. Click and drag the border to resize the left panel with the small vertical “pipe” on the panel border.

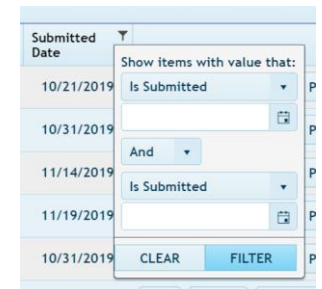
The **Edit** and **Delete** buttons have identifying icons with tooltips on the buttons to remind you of the button function.

Export a Response Record Before Submitting Data

You can download a record of the questions and your responses for this client any time during data entry by clicking **Export PDF** on the **Client Service Record Summaries** tab on the main **SERVICE TRACKING** dashboard.



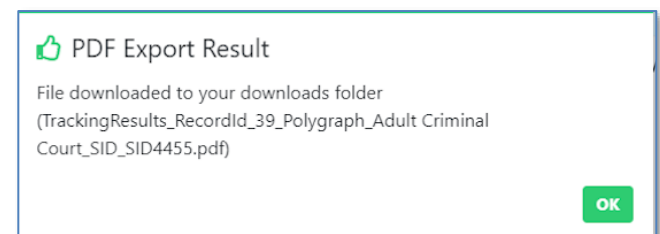
If you want to see data you have already submitted for a client, click the funnel symbol in the **Submitted Date** column change the filter from “Not Submitted” (default) to “Submitted”. A search field appears requesting criteria date ranges. Enter the criteria for the client(s) you want to see and click **FILTER**. A list of client data displays. Click the Export PDF button as you would for client data you have not yet entered.



The SOMB Data System then produces and downloads an Excel file for your use. A **PDF Export Result** popup appears with the name of the record placed in your designated downloads folder.

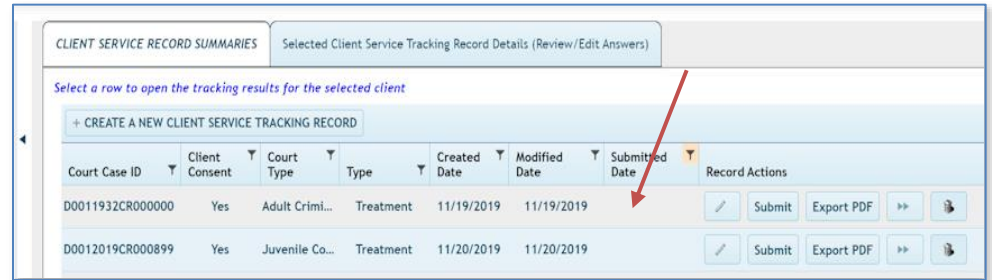
The PDF record shows you each question in the **SOMB SERVICE TRACKING** module, the possible answers, and your responses.

You can also access the file immediately by clicking the downloaded record in the lower left corner of your computer screen.



Edit Client Service Tracking Data

- 1- Click the **Client Service Record Summaries Tab** to view the list of client IDs. The full list of clients you have submitted will display on the screen. They will be identified by Court Case ID number.
- 2- Locate the Court Case ID from the list for the client whose data you want to review or edit.
- 3- **CLICK WITHIN THE CLIENT ROW** to access the Service Tracking Record data. (**NOT** the **Edit** button.)



The **Selected Client Service Tracking Record Details** tab opens for the client starting with Tab 1 - Referral Sources.

- 4- Review the information in the tabs, click the appropriate tab, and edit the data. Refer to previous instructions if necessary.
- 5- Click **Update** on the popup to change the data, or Click **CANCEL** to exit the popup without changing data.

Reminder: The tabs and their associated topics are as follows. Hovering the cursor over a tab reveals the topic.

TAB	TOPIC	TAB	TOPIC	TAB	TOPIC
1	Referral Source	6	Treatment Sessions	11	Match Treatment to Risk
2	Demographic Information	7	Session Frequency	12	Client Needs
3	Treatment/Adjudication	8	Level of Denial	13	Address Client Needs
4	Previous Sex Offense	9	Treatment Setting	14	Client Responsivity
5	Adjunct Treatment	10	Levels of Risk	15	Treatment Dates
				16	Outcome Information / Submit

Submit Responses

Tab 16 is where you submit your data into the SOMB data system.

Be aware that after you submit your responses, you will not have access to them for reviewing or editing. If you wish to review or edit any the data before submitting, refer to the previous section for instructions: **Edit Client Service Tracking Data.**

- 1- Click **SUBMIT** if you are convinced that all your responses are accurate to the best of your knowledge.

If all your answers are complete:

A popup appears with the message "Confirm Submit! This will set the Submit Date. After setting the submit date you will not be able to edit your responses. Do you wish to continue?"

Options to Confirm or Cancel appear below the question.

- 1- Click **CONFIRM** to submit your responses.

OR

Click **CANCEL** to exit the popup and return to the data collection areas.

Clicking **CONFIRM** produces a popup with the message "Service Tracking Record Completed. The Client Service Tracking Record is complete and has been submitted."

- 2- Click OK in the popup to confirm submittal.

Confirm Submit!

This will set the Submit Date. After setting the submit date you will not be able to edit your responses. Do you wish to continue?

CONFIRM **CANCEL**

Service Tracking Record Completed

The Client Service Tracking Record is complete and has been submitted.

OK

Screen returns to Client Service Record Summaries Screen. **NOTE: The new record will not visible onscreen.** If you need to change data after submitting the record, contact the SOMB Data System Administrator (email: yuanting.zhang@state.co.us).

If you have omitted answers:

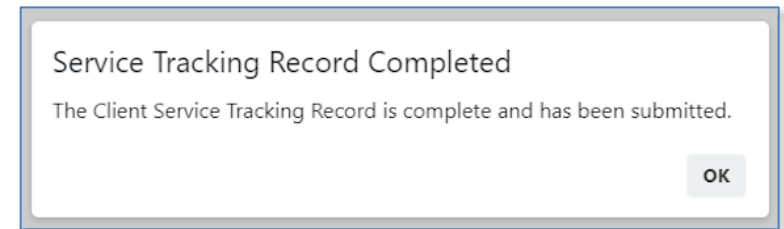
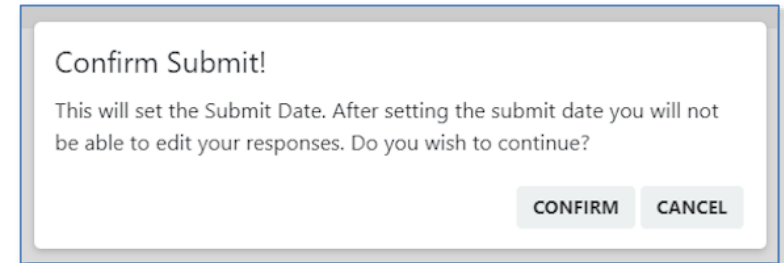
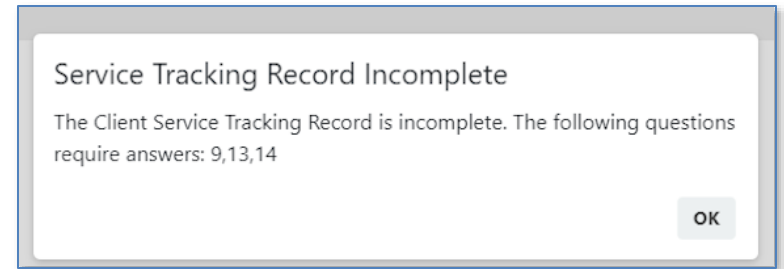
A popup appears with the message "Service Tracking Record Incomplete. The Client Service Tracking Record is incomplete. The following questions require answers: (number provided)"

- 1- Click **OK** and go to the indicated question(s) to complete the answers.
- 2- Go to Tab 15 and click **SUBMIT**.

If after your edit, all answers are complete:

A popup appears with the message "Confirm Submit! This will set the Submit Date. After setting the submit date you will not be able to edit your responses. Do you wish to continue?" Options to **Confirm** or **Cancel** buttons appear below the question.

- 3- Click **CONFIRM** to submit your responses.
a popup with the message "Service Tracking Record Completed. The Client Service Tracking Record is complete and has been submitted."
- 4- Click **OK** in the popup to confirm submittal.



Screen returns to Client Service Record Summaries Screen. **The new record will not be visible onscreen.**
If you need to change data after submitting the record, contact the SOMB Administrator (email: yuanting.zhang@state.co.us).

Submit Responses After Editing

The process for submitting edited responses is the same as for first responses. Return to Tab 16 and follow instructions in the Submit Responses Section.

NOTE: You can also submit from the **Client Service Record Summaries** screen.

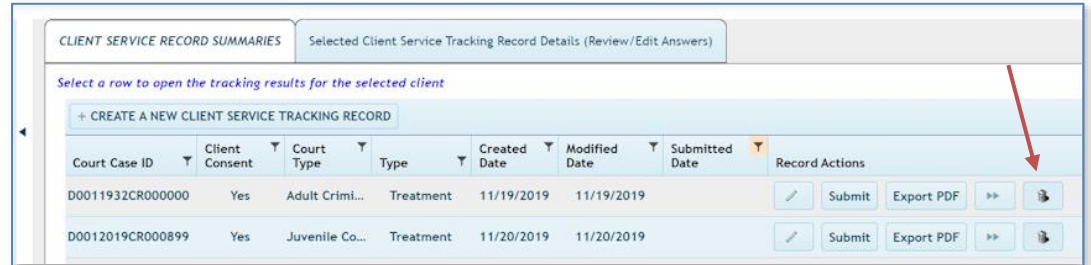


The screenshot displays the 'CLIENT SERVICE RECORD SUMMARIES' interface. At the top, there are two tabs: 'CLIENT SERVICE RECORD SUMMARIES' and 'Selected Client Service Tracking Record Details (Review/Edit Answers)'. Below the tabs, a message reads 'Select a row to open the tracking results for the selected client'. A button labeled '+ CREATE A NEW CLIENT SERVICE TRACKING RECORD' is visible. The main area contains a table with the following columns: Court Case ID, Client Consent, Court Type, Type, Created Date, Modified Date, Submitted Date, and Record Actions. Two rows of data are shown, each with a 'Submit' button in the Record Actions column. A red arrow points to the 'Submit' button in the first row.

Court Case ID	Client Consent	Court Type	Type	Created Date	Modified Date	Submitted Date	Record Actions
D0011932CR000000	Yes	Adult Crimi...	Treatment	11/19/2019	11/19/2019		Submit Export PDF >>
D0012019CR000899	Yes	Juvenile Co...	Treatment	11/20/2019	11/20/2019		Submit Export PDF >>

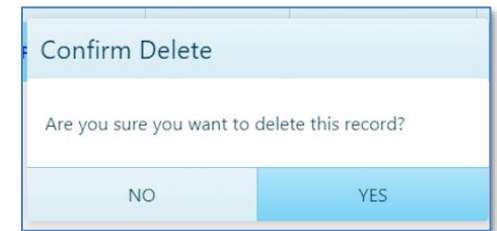
Delete a Client Service Tracking Record in the Client Tracking System

- 1- Click the **Client Service Record Summaries** tab to reveal the list of Client IDs.
- 2- Select a client ID and click the trashcan icon on the right side of the screen.



The popup to confirm that you want to delete appears.

- 3- Click **YES** in the popup to delete the record.
OR
- 4- Click **NO** to exit the screen and retain the record.



Contact for Questions or Concerns

If you have questions or concerns about entering data or about the SOMB Data System, email the SOMB Administrator at yuanting.zhang@state.co.us

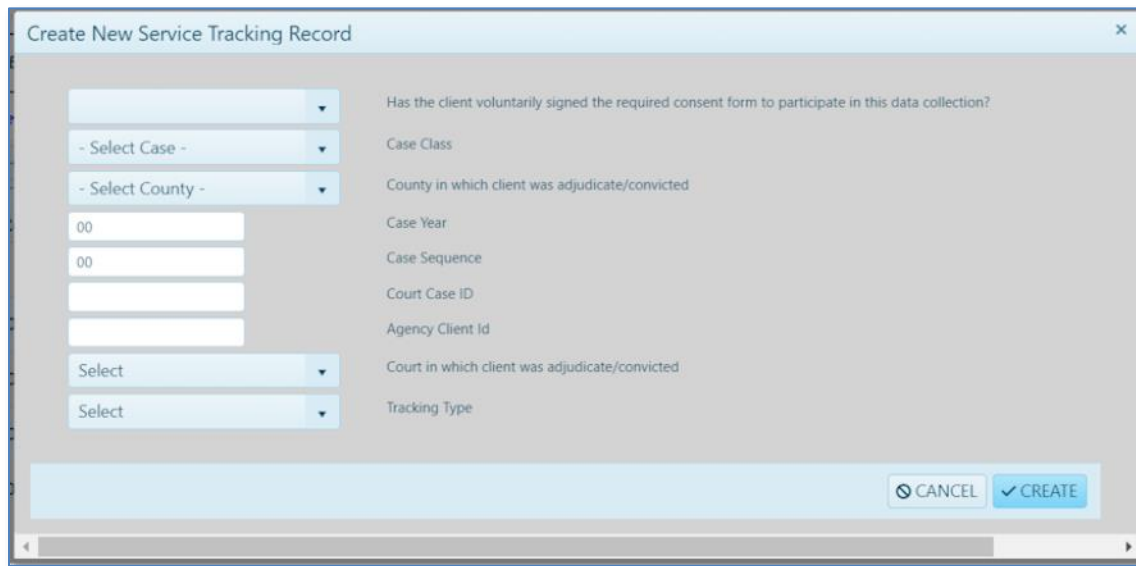
SOMB Data System FAQ

1. *If we use court case number, do we want the current court case number or the original sex offense case number ?*

Either number is fine. We prefer sex case number as it makes it easier to match later, but both will work. Even the ID for a closed case is fine.

2. *When clients refuse consent, do providers still need to provide the court case number?*

On the **Create a New Service Tracking Record** tab, the consent question will be the first question on tab. When the response to client consent is No, all of the remaining court case data will be populated as 0000s. The providers can either add data and submit, or submit without adding any data.



Case Class field: click the dropdown arrow and select CR, JD, or M.

County: County in which client was adjudicated/convicted.

Case Year: 4-digit year of adjudication/conviction

Case Sequence: enter the series of up to six numbers from the court docket.

The SOMB system generates a Court Case ID in the next field.

Court in which client was adjudicated/convicted: click the dropdown and select Adult Criminal Court or Juvenile Court.

Agency Client ID: (Optional field)

3. *Do I need to enter the data for someone who is not adjudicated/convicted? Similarly, does a community treatment provider enter data if they receive a client referral from DHS?*

It depends on who falls under the SOMB standards. This data entry applies only to clients who are under the SOMB standards and only if there was adjudication, conviction, or deferment (deferred judgement, deferred sentences, deferred adjudication). You don't have to report cases of pre-plea adjudication or diversion.

4. *What will be a provider see if they are both treatment provider and evaluator?*

One user name with two roles.

5. *How can I find a case quickly?*

On the Create a New Service Tracking Record pop-up, a new field for agency identification number has been added so that providers can find cases more quickly using the naming conventions they are more familiar with.

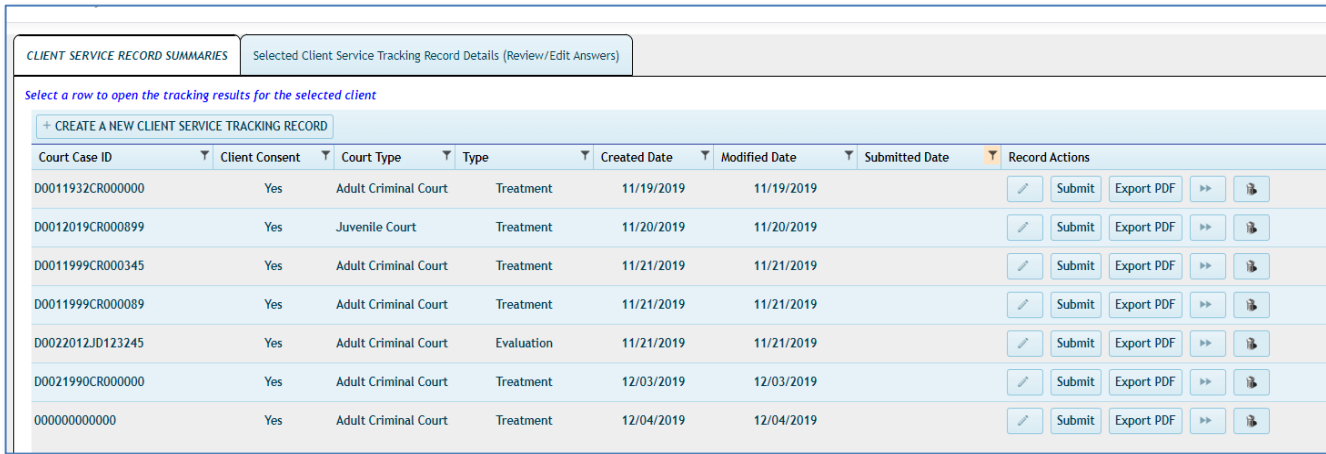
6. *Do I need to use the data system if I have an outside-of-the agency client transfer (or if a client transferred from residential to outpatient)?*

Yes. If you want to transfer the case to a provider who is outside your agency, you need to complete the case and use the SOMB Data System to submit the data. An out-of-agency transfer is considered an unsuccessful administrative transfer, according the SOMB standards.

If you transfer the case to another provider inside your agency (an internal agency transfer) you don't have to use the data system. The next question provides more information on internal agency transfers.

The screenshot shows a web-based form titled "Create New Service Tracking Record". The form is organized into two columns. The left column contains several input fields: a dropdown menu, a "Select" dropdown, a text input with "00" and a spinner, another text input, another "Select" dropdown, and a "Select" dropdown with an open menu showing "Treatment" and "Evaluation". The right column contains labels for "Case Class", "County in which client was adjudicate/convicted", "Case Year", "Case Sequence", "Court Case ID", "Has the client voluntarily signed the required consent form to participate in this data collection?", "Court in which client was adjudicate/convicted", and "Tracking Type". At the bottom right, there are two buttons: "CANCEL" and "CREATE".

7. How should I process transfers within an agency?



CLIENT SERVICE RECORD SUMMARIES Selected Client Service Tracking Record Details (Review/Edit Answers)

Select a row to open the tracking results for the selected client

+ CREATE A NEW CLIENT SERVICE TRACKING RECORD

Court Case ID	Client Consent	Court Type	Type	Created Date	Modified Date	Submitted Date	Record Actions
D0011932CR000000	Yes	Adult Criminal Court	Treatment	11/19/2019	11/19/2019		Submit Export PDF >>
D0012019CR000899	Yes	Juvenile Court	Treatment	11/20/2019	11/20/2019		Submit Export PDF >>
D0011999CR000345	Yes	Adult Criminal Court	Treatment	11/21/2019	11/21/2019		Submit Export PDF >>
D0011999CR000089	Yes	Adult Criminal Court	Treatment	11/21/2019	11/21/2019		Submit Export PDF >>
D0022012JD123245	Yes	Adult Criminal Court	Evaluation	11/21/2019	11/21/2019		Submit Export PDF >>
D0021990CR000000	Yes	Adult Criminal Court	Treatment	12/03/2019	12/03/2019		Submit Export PDF >>
000000000000	Yes	Adult Criminal Court	Treatment	12/04/2019	12/04/2019		Submit Export PDF >>



This button allows you to transfer clients and client data from one provider to another provider **within the same agency**. Providers can transfer clients by using this button only when a client is transferring from one provider within the agency to another provider within the same agency. If a client transfers to a different agency, that is considered an outcome and requires that the provider finish the case and submit data into the system as if the case is completed.

8. How and what should I input when a client has both adult and juvenile cases?

A client can only fall under one SOMB standard at one-time point, not both standards at the same time. Please enter data based on whichever standard you were following for that client.

9. Do I need to enter data for Interstate or Federal cases who follow SOMB standards?

No need to enter data for interstate or federal cases.

10. Can an office administrator enter the data for service providers?

This is strongly discouraged. But we understand there are circumstances and special needs. We don't control who the providers give their credentials to, so the liability of doing so falls on the service providers.

11. What do I do if I have client coming back to me?

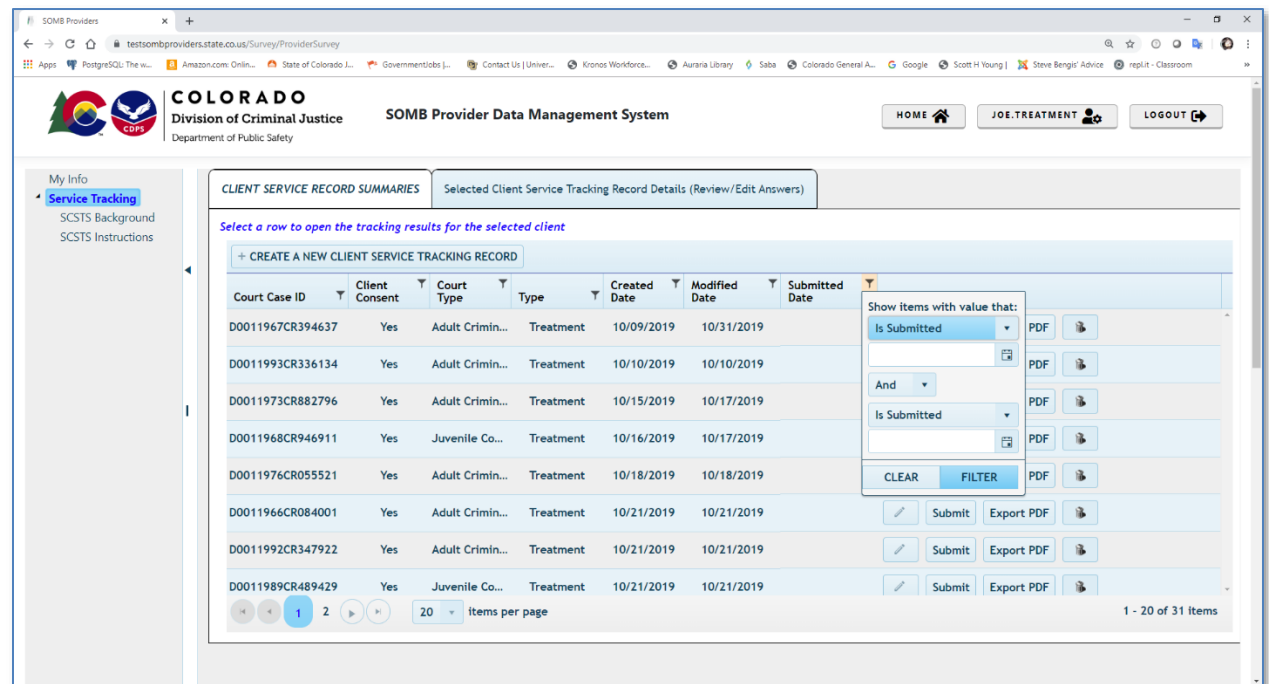
Treat it as a new case and do new data entry. Use the same identifying numbers that you used for the same client in the past.

12. What should I do if I see “Stop Scripts” message?

Users are responsible for configuring their browsers. If you get a stop script message, you may need to adjust configuration. Browsers have all kinds of settings, including how scripts are handled (disabled, confirm, allow, etc.). One easy fix is to change your Browser to Google Chrome to increase compatibility.

13. Can I still see the case once I submitted already?

Yes. Click the funnel icon in the Submitted Date and change the filter from “Not Submitted” (default) to “Submitted”. You can view the service tracking data after you submit your case, but you can’t edit it further unless you contact SOMB administrator.



14. How can I know which question tab I stopped at the last time I used the Data System?

If you want to know what questions you haven't answered, click on the submit button and it will show you in a popup which questions are still unanswered.