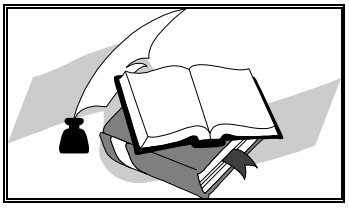


LODESTAR USER'S MANUAL

(Revised 10/5/2010)

The Lodestar MIS was developed, and is maintained, with funding from the Maternal and Child Health Branch of the California State Department of Health Services (MCH), and the Cal-Learn Section of the California Department of Social Services. The current Windows® version was developed, and is maintained, by the Branagh Information Group.

Lodestar was originally developed for MS-DOS® by
Elizabeth Mandell of Lodestar Management/Research, Inc.

Lodestar Technical Support
Branagh Information Group
(707) 895-2510

TABLE OF CONTENTS

INTRODUCTION **5**

SUPERVISION MAKES ALL THE DIFFERENCE! **6**

CONVENTIONS USED IN THIS MANUAL **7**

RUNNING LODESTAR **8**

The Welcome and Log-on Screens **8**

The Lodestar Control Center **9**
- *The Clients Screen* 10
  - Client Identification 11
  - Timestamp 11
    - *Locate* 11
    - *Add* 14
    - *Edit* 15
    - *Delete* 15
    - *Print / Print This Form* 15
    - *Case Notes* 16
    - *Children* 16
    - *Close* 17
  - Status Change 18
    - *Creating a New Status Record* 18
    - *Entering a transfer*: 19
    - *Client Change of Case Manager* 20
    - *Editing a Status Change Form* 21
    - *Adding a Waiver End Date for AFLP Clients New* 21
    - *Outreach Clients* New 21
    - *How to Wait List Clients* 22
    - *Deleting Status Change Form* 24
  - Add New Form / Existing Forms 24
    - *Adding a record* 24
    - *Changing an Index Child* 30
    - *Editing or deleting an existing case management record* 31
    - *Working with error-flagged records* 32
  - Cal-Learn Forms 32
    - *Orientation and Participation Problem* 33
    - *Report Cards* 33
    - *90 Day Participation Period* 35
- Medi-Cal 36
- Reports 37
  - Client Lists 38
    - *Client Roster* 38
    - *Billing List* 42
    - *Contact Log* 42
    - *Follow-Ups Due* 43
    - *Length of Enrollment* 45
    - *School Roster* 45
  - Management Summary 45
    - *Caseload Analysis* 45

Other Caseload Analysis 46
Child Immunization 47
Client Contact Summary 47
Comparison Report 47
Months of Service 47
Other Months of Service 49
Stat 45 49
Unduplicated Client Count 49
MCAH Key 50
Annual 50
Demographic Reports New 51
Progression Reports New 53
L.A. County 55
L.A. Case Assignment 55
L.A. Performance Measures 55
Utilities 57
System 57
Database Repair 57
Setup 57
Backup 59
Troubleshoot 61
Miscellaneous 61
Change Client ID 61
Change Case Manager ID 62
Transmit Data 62
To send your data by internet 62
Contacts 64
Usage Overview 64
Contact Log Report 64
Contacts Screen 66
The Client Contact Summary 68
Ad Hoc 69
Exit 69

UPDATING LODESTAR TO A NEW VERSION 70

WHAT LODESTAR REPORTS TO GENERATE, WHEN 71

LODESTAR BASICS 73

The Mouse 73

Objects 73
Pushbuttons 73
Scrollable Lists 74
Pull-down Lists 75
Fields and Text/Labels 75
Dialog Boxes 76
Icons 77
Other Objects 77

Getting Around in Lodestar's Data Entry Screens 78

The Esc (escape) Key 78

Error Handling 79

Definitions 80

APPENDIX 82

LODESTAR AGENCY LIST 82

AFLP Primary Language List 86

INDEX 87

Introduction

The Lodestar Case Management Information System was designed as a tool for agencies conducting comprehensive case management for pregnant and parenting teens and their siblings. The system adheres to standards developed by the Adolescent Family Life Program (AFLP), Adolescent Sibling Pregnancy Prevention Program (ASPPP), and Cal-Learn Program. The four primary functions of the system are as follows:

1) Gather client demographic and point-in-time information such as living arrangements, educational status, child health indicators, risk factors, service referrals and client contact tracking.
2) Facilitate agency caseload management and supervision of case managers through comprehensive management reports.
3) Create a complete and accurate statewide database of client information for analysis.
4) Produce State required reports and notices, such as the Stat 45, Client Months of Service report, and required client informing notices of action (NOA's).

Lodestar's modular design allows agencies flexibility in choosing the level of client tracking to implement. For example, an agency may choose to track and categorize each contact with a client, or omit this function of the system completely. There is a basic set of information gathered on all clients at Intake, Pregnancy Outcome, and in six-month intervals thereafter.

Lodestar runs under the Microsoft Windows® operating system on either a stand-alone PC or supporting multiple users on a PC network. A basic familiarity with Windows, such as how to use a mouse and manipulate pushbuttons, pull-down lists and perform other common Windows tasks is required. System users new to Windows are encouraged to read the ***Lodestar Basics*** section of this manual. Many of the basic techniques needed to operate Windows software programs are reviewed there.

Supervision Makes All the Difference!

An automated management information system such as Lodestar is a powerful tool that has the potential to help administrators and other staff do their jobs more efficiently and effectively. It provides a wealth of information about agency clients, services linkages, program activities, and program outcomes. It measures success in meeting contract requirements and program or worker goals and facilitates good program management and planning. It can only serve these purposes, however, if the data in the system is entered completely, timely and accurately, and if the management information produced is seen by the right people and used productively.

The key to maintaining an accurate, up-to-date MIS and to using the information generated from it effectively is attentive system supervision. Good system supervision does not require solving hardware and software problems or even understanding the technical aspects of computer operation. It means insuring that:

> The right forms are filled out at the right time, checked for accuracy and completeness, and submitted for data entry in a timely manner.
>
> Data is entered in a timely manner.
>
> Data problems are noticed and resolved promptly, and corrections are entered into the computer promptly.
>
> Lodestar reports are run monthly, distributed to those who need to see them, and used well for program management and monitoring.
>
> Data is backed up regularly.
>
> Case managers are trained as needed on Lodestar forms.
>
> Data entry clerks are trained as needed on the Lodestar software.
>
> A proper filing system exists for forms, including those that have been entered into the computer, those that have not been, and those that contain a data problem.

AFLP/ASPPP Sibling/Cal-Learn providers should designate a management-level supervisor to handle these responsibilities.

Conventions Used In This Manual

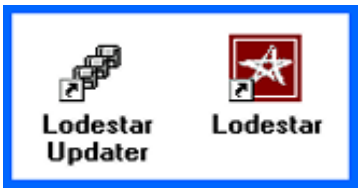
Aside from section headings, words in non-italicized bold face type refer to Lodestar screens and items found on them (e.g. "Once you are in the **Clients** screen, click the **Locate** pushbutton"). Computer keyboard characters and functions are represented in console font, in quotes where the actual character is used, e.g. "X," "3" and "@," and capitalized where names of keys are used, e.g., Down Arrow, Enter and Space. An underlined character indicates the Alt key keyboard combination or “hot-key” which corresponds to the button function (e.g., holding down Alt + “L” in the above example is the same as clicking on the **Locate** pushbutton).

Words in italicized bold face type refer to sections of the user’s manual (e.g. ***Lodestar Basics***).

The names of Lodestar forms are capitalized (e.g. Client Identification and Update form). Wherever possible, we have tried to avoid confusion by using the following distinctions: where Lodestar *forms* (the actual paper documents) contain *data items*, the corresponding Lodestar *screens* (on your computer) have *fields* into which data is entered.

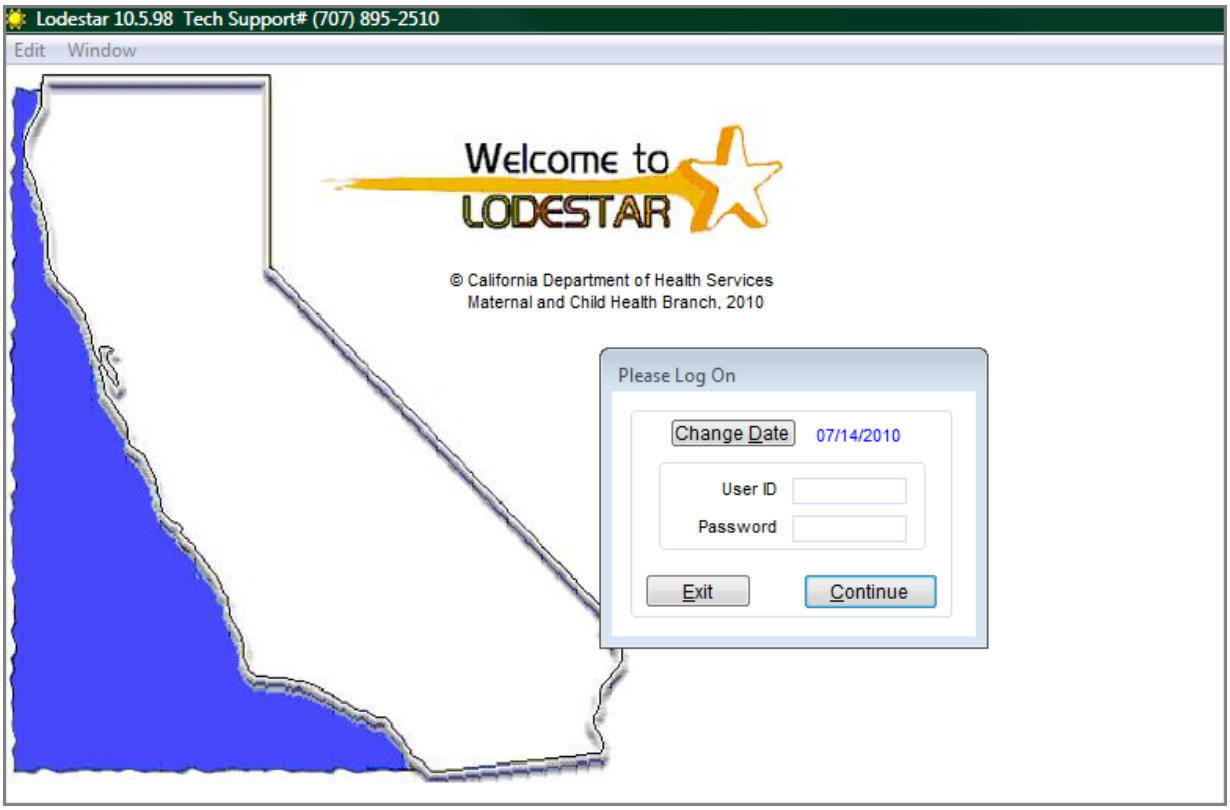
Running Lodestar

The red square with a white star and the title “Lodestar” accesses the main Lodestar application. Double click on this icon (or select it from the Start Menu) to begin running Lodestar. The Lodestar Updater is sometimes needed after download to help complete an update to a new version of Lodestar.



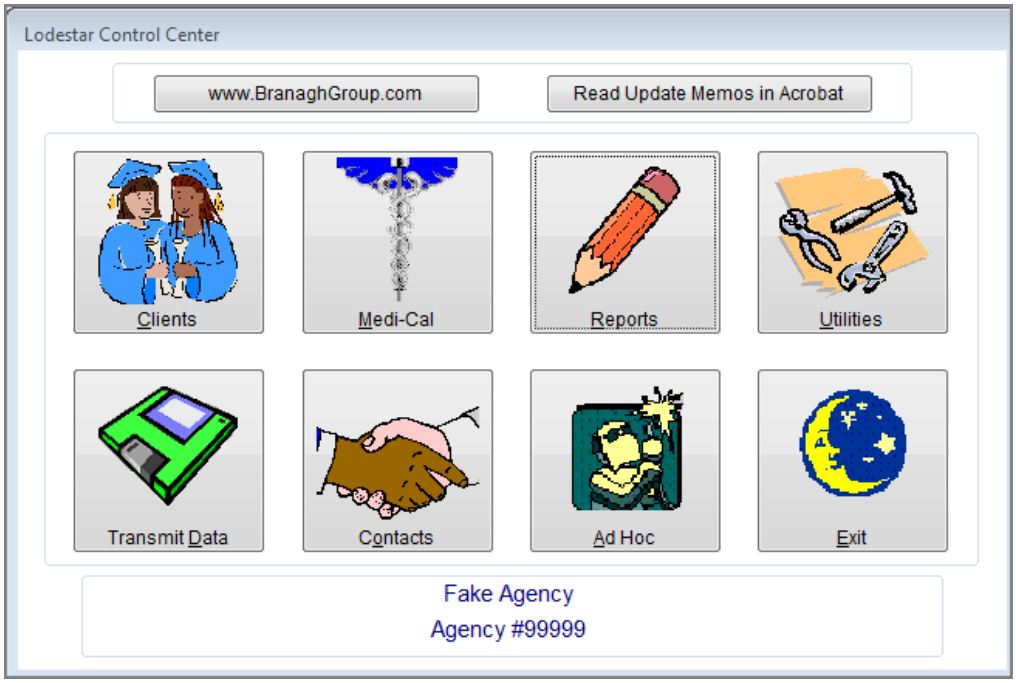
The Welcome and Log-on Screens

After double clicking on the Lodestar icon as described above, the Welcome screen will appear and a window entitled **Please Log On** will appear. In this window, **Today’s Date** is taken from your computer’s calendar. Make sure it is correct before continuing. Type in your user ID and your password in the fields provided (your supervisor assigns both). Press `Enter` or `Tab` after completing each. Press `Enter` when the **Continue** button is selected (a dotted line will appear around the word "**Continue**") to get to the **Lodestar Control Center**.



The Lodestar Control Center

The **Lodestar Control Center** screen is the hub from which you access the various modules of the Lodestar system. To access a module, click the mouse once within the box containing the icon and module name. Displayed below the pushbuttons are the name of your agency and your agency number. Above the modules are two more buttons. The left button gives access to our website for downloading forms and manuals. The button on the right accesses several recent update memos.



The following modules are accessed from the Lodestar Control Center:

Clients - accesses all client data entry screens with the exception of the Contact Tracking and Medi-Cal. Use this module to access client Intake, Pregnancy Outcome, Follow-Ups, and all Cal-Learn informing notices and notices of action (NOA's).

Medi-Cal - data entry and reporting modules for Medi-Cal FFP processing.

Reports - produces Lodestar management reports and client lists.

Utilities - includes procedures to repair damaged system data files and other system housekeeping tasks. It also includes Setup features for updating information about your agency (such as AFLP and ASPPP contracted Months of Service), case managers, client school lists, orientation locations, and Lodestar users.

Transmit Data - automates sending monthly data to MCH.

Contacts - tracks case manager contacts with clients. Use of this module is not mandated by AFLP, ASPPP, or Cal-Learn, and as such is optional at the site's discretion.

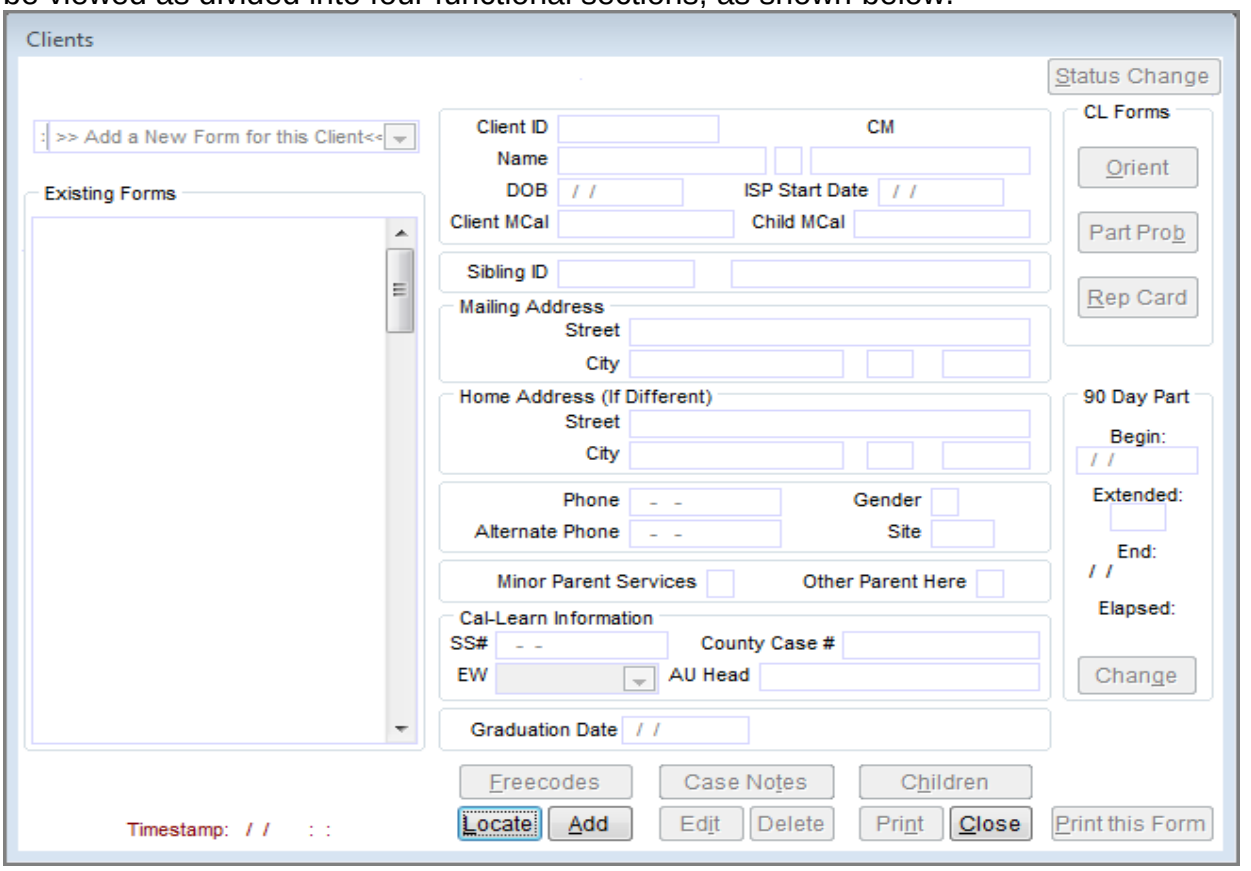
Ad Hoc - allows the user to create customized queries and reports.

Exit - closes Lodestar and returns control to Windows.

IMPORTANT: Do NOT exit Lodestar in any way *other than* the Control Center's **Exit** pad. This function closes all files properly and insures against data loss or corruption. Always make sure that Lodestar has been exited through this button BEFORE turning off or leaving your computer.

The Clients Screen

The **Clients** screen serves as the main module for locating, editing, and adding client data to the Lodestar database. It accesses and displays the current and past data for a given client, and may be viewed as divided into four functional sections, as shown below.



Case management reporting period forms

Client Identification section.

Cal-Learn section

Current (and past) client status information

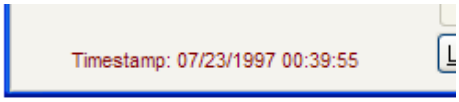
The center section of the screen displays the client that is currently being accessed. It contains the client identification data (as taken from the Lodestar Client Identification and Update form). The column on the left of the screen displays and controls the creation and editing of the Lodestar case management reporting period forms. The column to the right contains Cal-Learn related data such as orientation, report cards, and the 90-day participation period information. The top section of the screen displays the client's current status and funding source (i.e. AFLP - Active) and is used to access a client's status history and to change a client's status. Within each section are a

set of pushbuttons and scrollable lists that control the actions for that section. The sections and control buttons are described in further detail below.

Client Identification

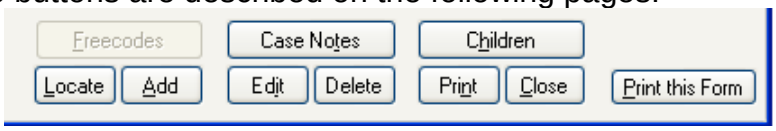
Data fields in the center part of the Clients Screen correspond to data items on the Client Identification and Update form. For a client to be in the Lodestar system, they must be added to the database from this screen.

Timestamp



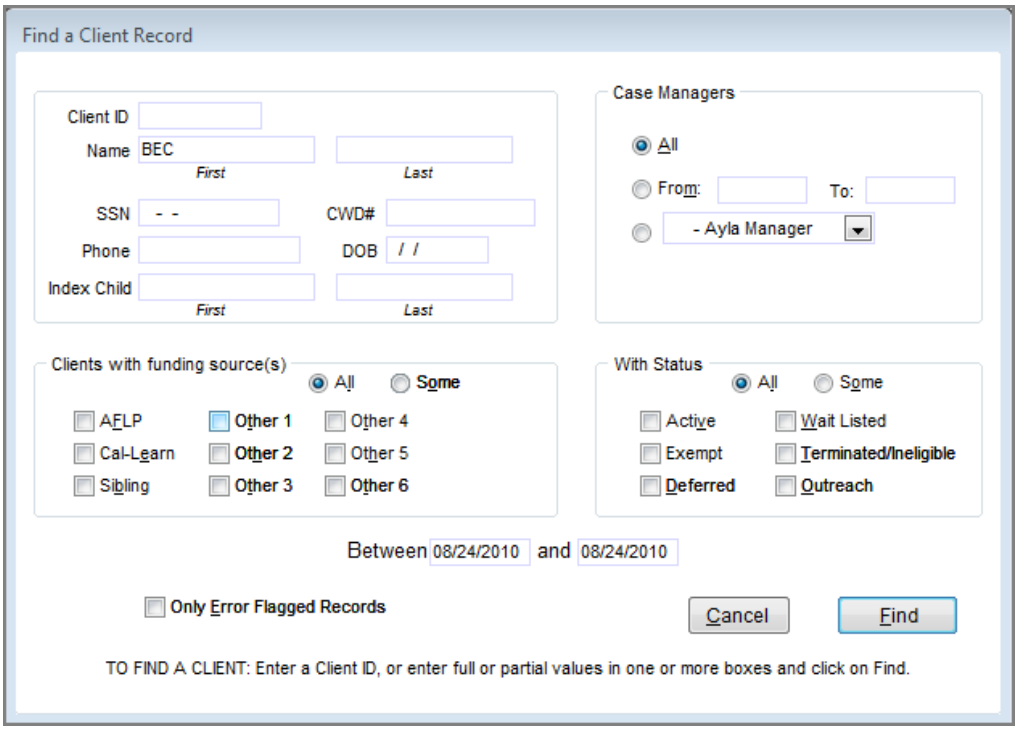
The timestamp at the bottom of each form records the date and time that the form was first entered. Subsequent edits of that form will not change the original date and time.

Take a look at the pushbuttons at the bottom of the center portion of the screen. The functions of each of these buttons are described on the following pages.



Locate

The Locate pushbutton is used to bring to the screen the Identification and Update form data of a client that has already been entered into Lodestar. You must always do this before you can add, edit or delete data in any of the other Lodestar client screens for that client.

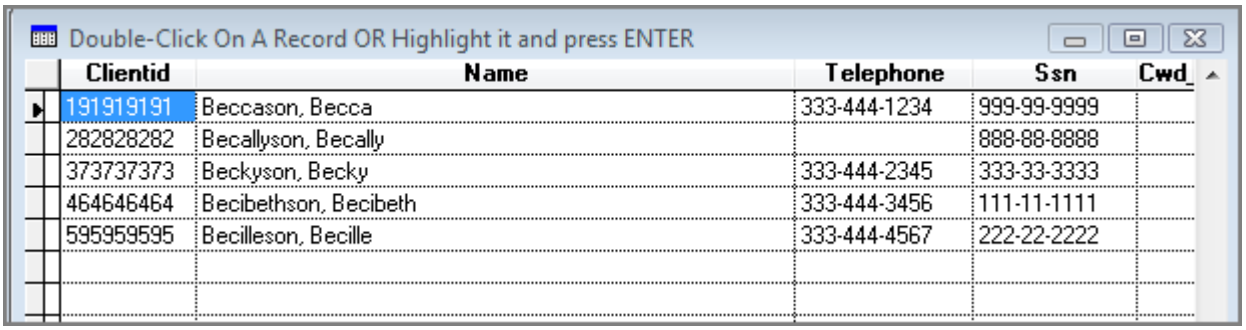


To locate a client, click on the **Locate** pushbutton. A window entitled **Find a Client Record** appears (shown above), allowing you to locate a client in many ways. You can locate by Client ID number, Case Mgr ID number, the name of the client (first and/or last), the name of the client's index child, client's SS#, the CWD case #, the client's phone #, date of birth, funding source or status. You may use any combination of search criteria to find a client or clients, or no criteria at all. By leaving all the fields blank, Lodestar will find *all* the clients in your database.

For the search illustrated above, the first few letters of the client's name were entered. It would also have been possible to enter just the last name (BECKYSON), or just the first name (BECKY), or just the initial of the last name (B). Lodestar will conduct the search on just about any full or partial entry into one of more of these fields, provided it is entered starting from the left. You will need to try entering different search criteria to become familiar with how the **Locate** command works, but you will find it a useful and flexible tool.

After typing in data for the client(s) you wish to locate, click on **Find**. If Lodestar cannot match a record to the data you typed in, a message will appear briefly in the upper right corner of the screen that says "Client record not found. Please try again or press Cancel."

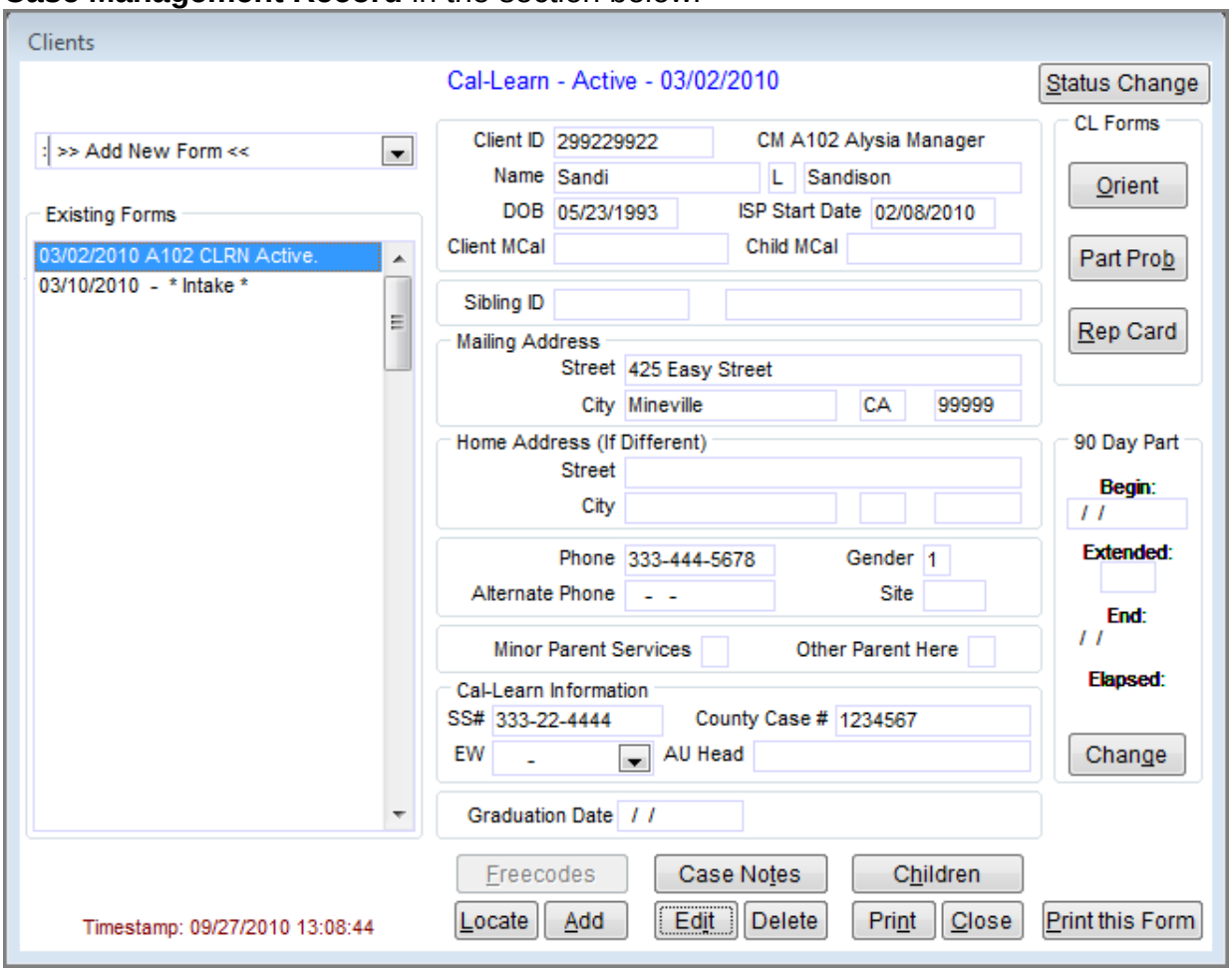
Sometimes the search yields more than one matching record, depending on the specificity of your search criteria. In the example shown, BEC was typed in the first name and there are five clients who have BEC in their first name. Lodestar will place on the screen a scrollable list containing all the records that match the search criteria. Select a record from this list by double clicking anywhere in the desired record.



Clientid	Name	Telephone	Ssn	Cwd
191919191	Beccason, Becca	333-444-1234	999-99-9999	
282828282	Becallyson, Becally		888-88-8888	
373737373	Beckyson, Becky	333-444-2345	333-33-3333	
464646464	Becibethson, Becibeth	333-444-3456	111-11-1111	
595959595	Becilleson, Becille	333-444-4567	222-22-2222	

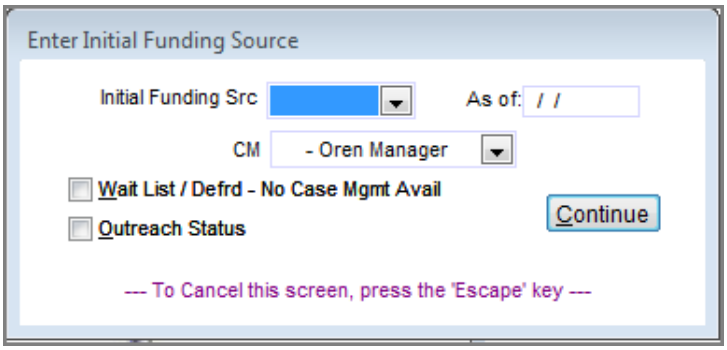
You can also locate error-flagged records by clicking the **Error Flagged Records** check box. (You may also enter any other search criteria, if desired.) Then activate the search by clicking on **Find**. A scrollable list of clients whose records are error-flagged (and who match any other criteria entered) will appear. To correct an error-flagged record, select the record by double clicking anywhere in the desired client's row.

Double clicking on a client will return you to the **Clients** screen. The case management reporting period records for that client are shown in the **Existing Forms** scrollable list on the left side of the **Clients** screen. To work with a case management record, follow the procedures under **Editing a Case Management Record** in the section below.



Add

Click on the **Add** button to add a new Client Identification and Update form.



A window to collect information about the **Initial Funding Src** appears. Enter the first letter of the funding source (C for Cal-Learn, A for AFLP) or open the pull-down list by clicking on the down arrow symbol and then clicking on the correct funding source, which will then pop into the field. Press Tab to get to the **As Of** field. Enter the date when billing can commence to that funding source. The highlight will automatically jump to the **CM** (case manager) field. To the right of this field is a pull-down arrow: . To activate the pull-down list, click on this arrow, and then click on the case manager you want, first scrolling the list if necessary until the desired case manager's ID and name are visible. The selected ID and name will pop into the field. (For detailed instructions on setting up staff and other information, see the **Setup** section, below.) If the client is being wait listed or is being deferred because no case management is available, you may click the **Wait List / Defrd - No Case Mgmt Avail** check box. If the AFLP client is being outreached, check **Outreach Status**. For information about tracking wait listed or outreached clients, see ***Outreach Clients*** *or* ***How to Wait List Clients*** in the ***Status Change*** section of the user's manual, below. Finally, click on **Continue**. The Initial Funding Source Window will disappear, and you will be able to enter information on your new client. Enter the client's ID number into the highlighted **Client ID** field.

Proceed to fill out all mandatory fields. The fields on the screen are in the same order as the data items on the form. If the data you enter fills up the entire field, the highlight will automatically jump to the next field. If it consumes only part of the field, you must press the Tab key to move to the next field. If you wish to skip a field that isn't mandatory and for which there is no data, you can press Tab to skip over one field at a time, or you may click the mouse pointer at the start of the next field you wish to enter data in. If you make a mistake in entering data, you can hold down the Shift key and press Tab to go back one field at a time (this is known as the "Back-tab" or "Shift-tab" key combination) or you may highlight the field in which you want to correct your entry and type in the correction.

Please note that the optional **EW** field under **Cal-Learn Information** is also a pull-down list, and you can select an EW (eligibility worker) in the same manner as you select a case manager on the top part of the screen.

Although the **Graduation Date** now can be entered on the Client screen, please DO NOT enter the date until the client actually graduates. If you enter an Education form into Lodestar when the client graduates, the graduation date will automatically populate in the **Clients** screen also.

After you have completed entering the data, if you are satisfied with your entries, save the record by clicking on the **Save** pushbutton. All of the pushbuttons are now available to you. If do not wish to save the record, click on the **Cancel** pushbutton.

Edit

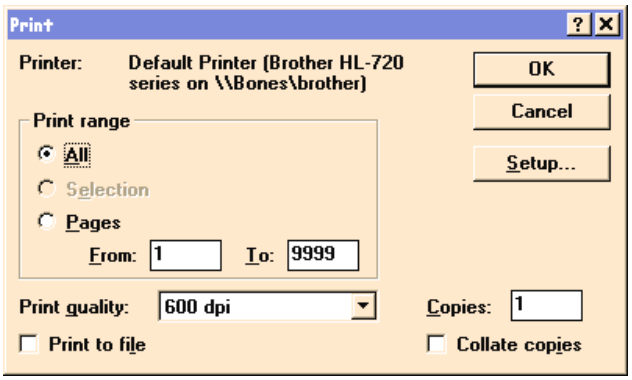
To edit the Client Identification form currently on the screen, click on **Edit**. The highlight will jump to the **Name** field at the top of the screen. Press the Tab key until the field you want to change is highlighted or directly highlight the field or portion of the field you want to edit, and then type in the changes. If the field is a pull-down list, open the list by clicking on the down arrow and then click on a new value.

To save your changes, click on **Save**. Otherwise, click on **Cancel** to undo all changes.

Delete

Activating the **Delete** pushbutton will delete all records for the client whose identification form is currently on the screen. A message will appear asking you to confirm that you want to take this action. Without a client identification record, none of the other records for the client are valid, and that is why they must also be deleted. *This is a serious step, so exercise caution in deleting a client identification record.* In the event you delete a record by mistake, you may have to re-enter all records for the client from the Lodestar forms. Please call tech support at the number provided on the screen and they will help you complete the deletion. Note that it is possible to individually delete records other than Client Identification records, but NOT by using the **Delete** pushbutton on the Client Identification section of the **Clients** screen. See under the ***Status Change***, or the ***Add New Form/Existing Forms*** sections of the manual, below, for more on deleting these kinds of records individually.

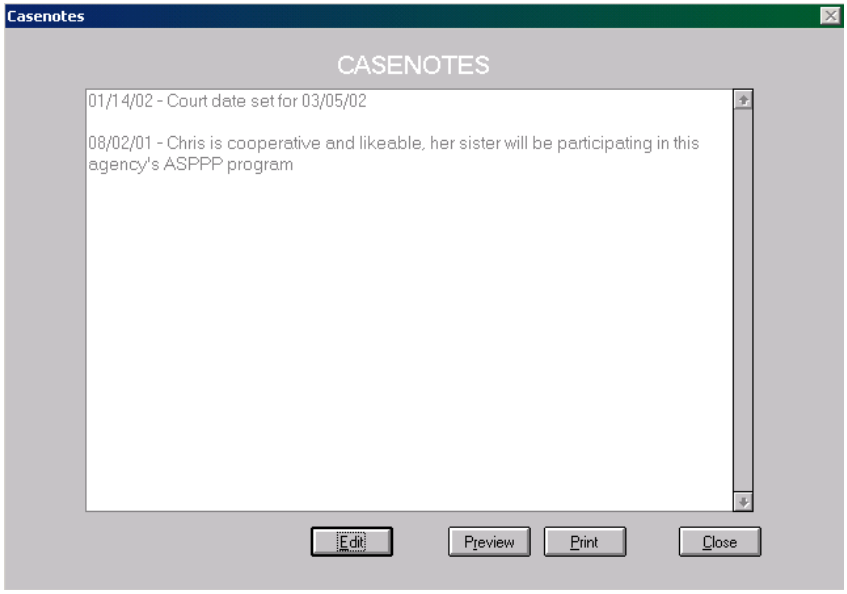
Print / Print This Form



Activating the **Print** or **Print This Form** pushbutton will print a Lodestar Client Identification form for the client whose record is on the screen. All LodeStar Forms Screens have a "Print This Form" button that will print out filled in copies of the form. All data entered will be printed. This printout can go into the client's folder or be used to transmit information about the client to a new agency or location. A standard Windows **Print** dialog box appears that allows you to customize the print job. Print windows are more fully explained in the ***Reports*** section of the manual.

Case Notes

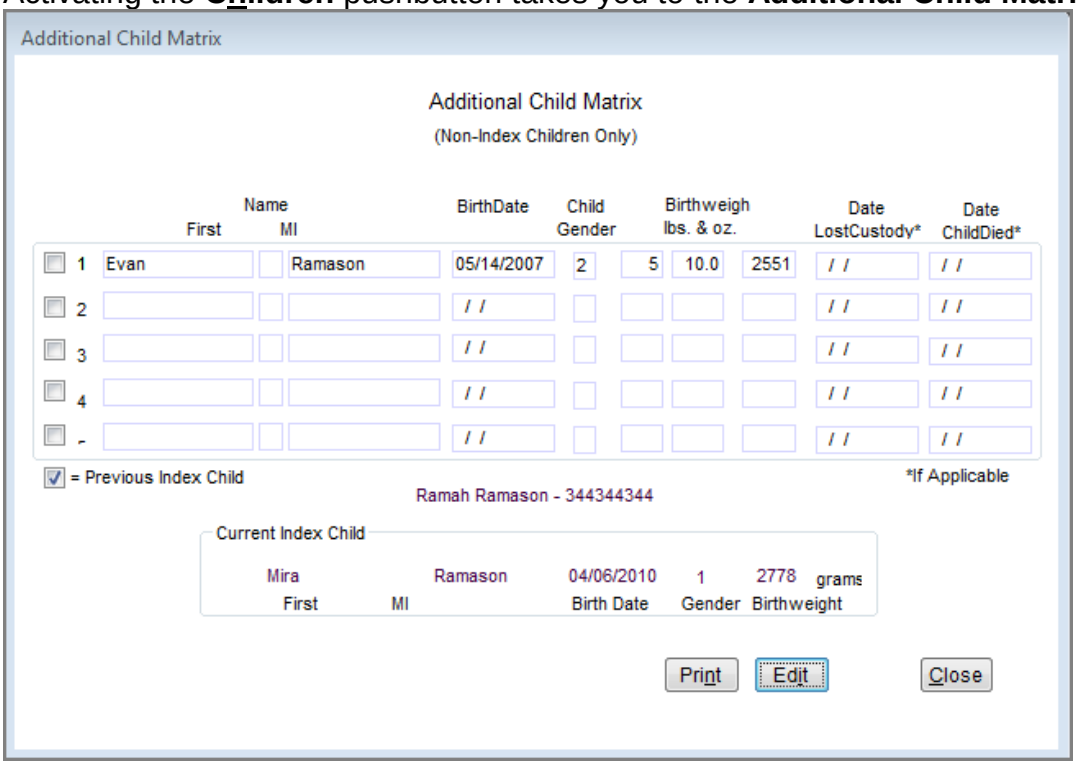
Activating the **Case Notes** pushbutton will take you to a screen where you can view any



comments that may have been entered for the selected client. These are entered from the Optional Casenotes item on the last page of the Client Identification and Update form. If you click the **Edit** pushbutton you will be able to add or modify the comments as needed. Click on **Save** to save your comments and any other changes or **Cancel** to return the Casenotes to their original state. Click **Close** when you are done.

Children

Activating the **Children** pushbutton takes you to the **Additional Child Matrix** screen:



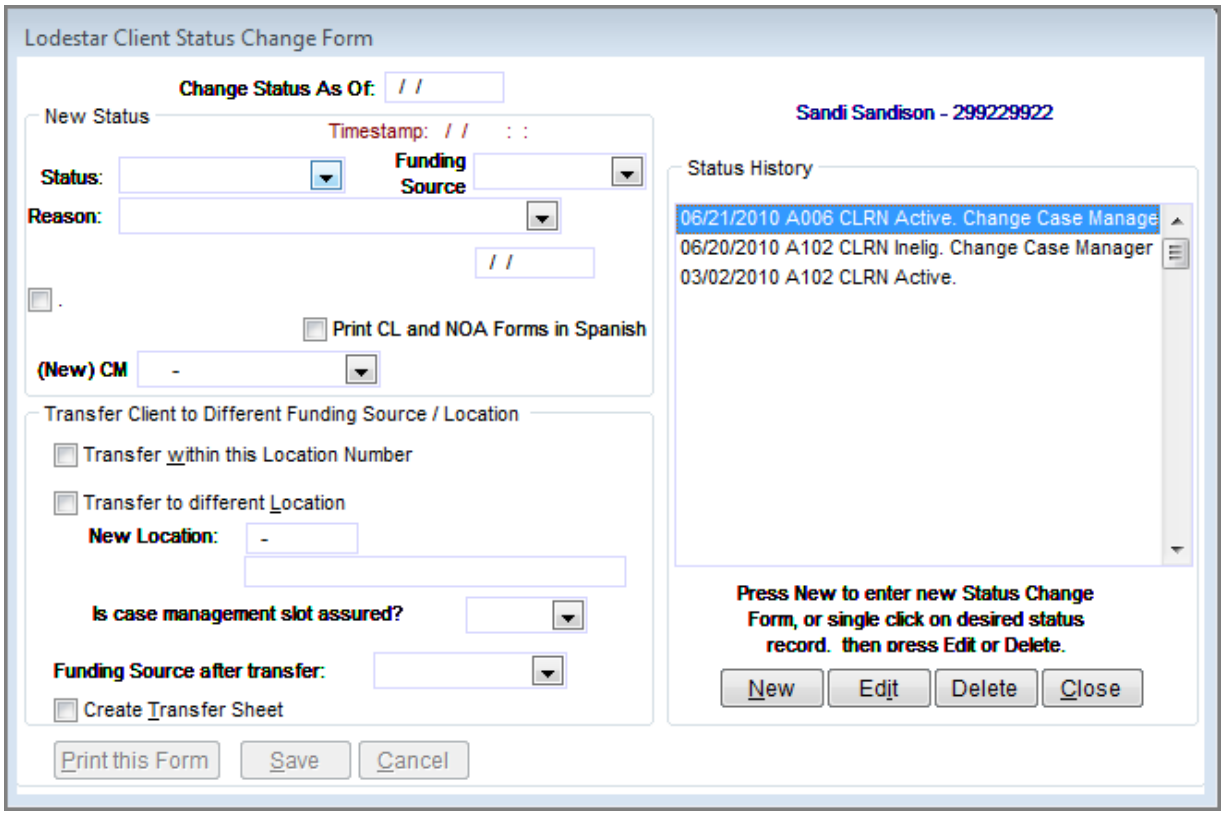
This screen corresponds to the Lodestar Additional Child Matrix form, and allows you to enter and/or edit name, birth date, gender and birth weight data for up to five children *other than* the Index Child, as well as any date of death or loss of custody for each child. However, if your client gives birth to a non-index child while in the program, fill out the **Pregnancy Outcome** instead and mark it as **Non-Index**. This will automatically fill the information on the non-index child into the **Additional Child Matrix.** This screen has its own **Print**, **Edit** and **Close** pushbuttons, each of which works in the same manner as on the Client ID screen. The Additional Child Matrix screen also shows you current information on the Index Child, but these fields are not editable. If one of the children listed had previously been the Index Child but is no longer because of death or loss of custody, a mark will appear in the checkbox next to the number on the left for that child. This field is also not an editable field, but is set by Lodestar after a change in Index Child has been recorded. (See under **Changing An Index Child** in the ***Add New Forms / Existing Forms*** section of the manual, below for further details.)

Close

Clicking on the **Close** pushbutton on the client ID screen returns you to the **Lodestar Control Center**.

Status Change

To add a Lodestar Client Status Change form or edit an existing status change record, click on the **Status Change** pushbutton at the top right of the **Clients** screen. A **Lodestar Client Status Change Form** screen appears. The right side of the screen shows the client's status history, with the most recent record on top. The left side corresponds to data items on the **Status Change** form.



Creating a New Status Record

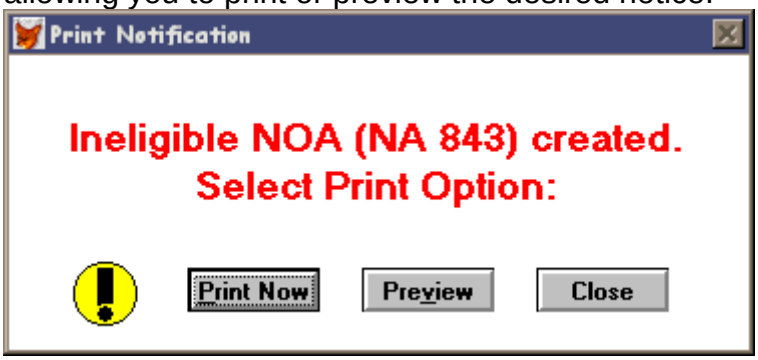
Click on **New** at the bottom of the screen. The **Change Status As Of** field will be highlighted. Enter the date of the status change and/or transfer. The highlight will jump to the **Status** field in the New Status portion of the screen.

Activate the **Status** pull-down list by clicking on the black arrow. Click on the new status, which will then automatically pop into the field. Tab to highlight the **Funding Source** field and select a value for that field in the same manner. If the new status is AFLP Terminated or Wait-List or Cal-Learn Deferred, Exempt or Ineligible, press Tab to get to the **Reason** field (it will be inaccessible for other statuses). Activate the pull-down list and click on the correct reason, which will then automatically pop into the field. If the status is Terminated or Ineligible for reason Change Case Manager, you will need to fill in the new case manager's code. Lodestar will then automatically create the active status with the new case manager's code. If the new status is Cal-Learn Exempt or Deferred, press Tab to get to the **Exemption / Deferral Review Date** field and enter the review date from the form. Click on the **Create Exemp/Def (CL-10)** check box if you wish to preview

and/or print the notice. Clients may not go directly from Cal-Learn Active to Deferred for reason no case management available. They must be made ineligible first. It is recommended that you create a special Case Manager code for Deferred clients, similar to one for Waitlisted clients, such as 0000. This will help you to keep track of these deferred clients in reports.

If the new status is Cal-Learn Ineligible and you wish to preview/print the Ineligible NOA, click in the **Create Ineligible NOA (NA 843)** check box provided.

Now click on **Save**. If you have selected a notice to be previewed or printed, a dialog box like the one below will appear, allowing you to print or preview the desired notice.



You also have the option to print in Spanish any CL or NOA forms that LodeStar generates.

***Entering a transfer*:**

Lodestar will automatically handle any of the transfers possible within the AFLP/ASPPP/Cal-Learn system. Before you enter a transfer, you need to know if the client is going to a new location (a "location" or "location number" in Lodestar refers to a different computer not linked electronically to yours) and what the funding source after the transfer will be. Transfers for Cal-Learn clients are handled slightly differently than AFLP/ASPPP transfers; this is discussed in detail below.

To transfer an AFLP/ASPPP client:

> After clicking on **New** and entering the **Change Status As Of** date, select a New Status of "Terminated" by using the pull-down arrow and then select the current **Funding Source** for which the termination applies (AFLP or Sibling). Then, under **Reason**, choose "9-Transfer to Different Funding Source and/or Agency."
>
> If the client is being transferred within this (your own) location, click on the **Transfer within this Location Number** check box. Activate the **Funding Source after transfer:** pull-down and select the new funding source. Then click on **Save**. Lodestar will create *two* new status records under Status History - a "Termin Transfer other fund…" record for the old funding source and an Active record for the new funding source with a date one day later than the transfer date (since a client cannot have two different statuses on the same day).
>
> If the client is being transferred to a different location, press Tab to highlight the **New Location** field and enter the new Location Number. (Location Numbers are found at the back of the User's Manual and in the Appendix of the Lodestar Coding Instructions.) Then

enter the agency name of the new location. Activate the **Is Case Management Slot Assured?** pull-down list and click on the appropriate answer: Yes, No or Unsure. Activate the **Funding Source After Transfer** field pull-down list field and click on the correct funding source. If you wish to print/preview the Transfer Sheet to send to the new agency, click in the **Create Transfer Sheet** check box.

Click on **Save**. If you have opted to **Create Transfer Sheet**, a print notification window will appear which will allow you to print and/or preview the notice. Click on **Close** when you are done. Lodestar will create a "Termin Transfer other fund…" status record to indicate the transfer.

To transfer a Cal-Learn client:

Click on **New** and enter the **Change Status As Of** date, and then use the **Status** pull-down to select a new status of "Ineligible." Lodestar will automatically select "2-Cal-Learn" as the funding source (since "Ineligible" applies to no other funding source). Use the **Reason** pull-down to select the appropriate response, and click on the **Create Ineligible NOA (NA 843)** checkbox if you wish to generate this notice. If the client is being transferred within this (your own) location, click on the **Transfer within this Location Number** check box. Activate the **Funding Source after transfer:** pull-down and select the new funding source. If the client is being transferred to a different location, click on the **Transfer to different Location** check box and then press Tab to highlight the **New Location** field and enter the new Location Number. (Location Numbers are found at the back of the User's Manual and in the Appendix of the Lodestar Coding Instructions.) Then enter the agency name of the new location. Activate the **Is Case Management Slot Assured?** pull-down list and click on the appropriate answer: Yes, No or Unsure. Activate the **Funding Source After Transfer** field pull-down list field and click on the correct funding source. If you wish to print/preview the Transfer Sheet to send to the new agency, click in the **Create Transfer Sheet** check box.

Click on **Save**. If you have opted to create any notices or transfer sheets, a print notification window will appear for each that will allow you to print and/or preview each in turn. Click on **Close** when you are done. Lodestar will create a new status record to indicate the transfer.

Client Change of Case Manager

To show a Change of Case Manager for an active client, **Locate** the Client. Then click on the **Status Change pushbutton** at the top right of the **Clients** screen. Click on **New** at the bottom of the screen. The **Change Status As Of** field will be highlighted. Enter the date that corresponds to the last day with the current case manager. Enter the status of Terminated or Ineligible depending on funding source. If Terminated enter the funding source, if Ineligible Cal-Learn will automatically fill in the funding source box. Use the pull-down list for the reason (you will need to scroll way down past a blank section) or simply type 77 – Change CM. Use the pull-down list for the New Case Manager field and select the proper Case Manager. Click on **Save**. Two new status records will show on the right. One will be the termination with the original Case Manager and the second will be the Active status with the new Case Manager on the very next day. It is not

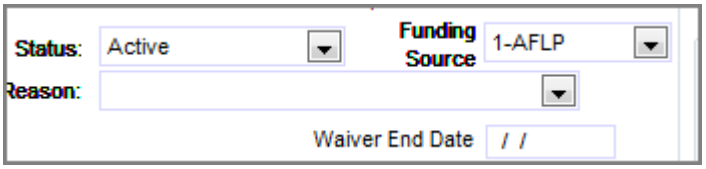
possible to use the '77 - Change CM' reason for clients who are waitlisted, outreached or deferred or changing to a new funding source. Please call Tech Support for other options.

Editing a Status Change Form

Editing should be used only to correct errors or add a **Waiver End Date** for an AFLP client who already has the Active status. When a client has a new status always enter it as **New**. To edit an existing form, highlight the form in the **Status History** window on the right side of the screen. Then click the **Edit** pushbutton. The data in the form moves to the left side of the screen. Press Tab to get to the field(s) you want to edit. Make your changes. When you are through, click on **Save** to save the changes, or **Cancel** to cancel them. Click on the **Close** pushbutton when you wish to return to the **Clients** screen.

Adding a Waiver End Date for AFLP Clients New

If you have a client who has been given a waiver of the 18 and 18 Rule or Age 19 Rule, you will need to enter the **Waiver End Date** in that client's **Status Change** screen.
Navigate to the **Status Change** screen. Highlight the current **Active** status in the **Status History** window and click **Edit.** You will see a place to enter **Waiver End Date** on the left side of the **Status Change** screen below the **Reason** pull down.



Enter the appropriate date and click **Save.** **DO NOT** edit the **Change Status As Of** date or make any other changes to this status.

If you know the date the waiver ends when initially entering an Active status for a returning client, the **Waiver End Date** can be added as you fill out the rest of the **Status Change** screen.

Outreach Clients New

To enter a client as **Outreached for AFLP**, do the following

- Assign a case manager to the client who will be outreached. The case manager will fill out a Client Identification and Update form to enter into Lodestar and write Outreach at the top of the form. **Outreach status can only be given before the client's first Active status.** Click **Add** in the Lodestar Client screen. In the **Initial Funding Src** screen choose AFLP, enter the date, check the **Outreach Status** and use the pull down to choose the case manager. Click **Continue**. Enter the Client Identification and Update Form into Lodestar in the **Clients** screen. Please do not change case manager

while a client is in Outreach. Wait until after the client becomes Active in AFLP to make the case manager change.

- To make the Outreached client Active in AFLP, fill out a Status Change form for the Active status, navigate to the **Status Change** screen for that client and click **New**. Fill in the date and choose Active for Status and AFLP for Funding Source. Click **Save**. The client can go directly from Outreach status to Active AFLP, but if they become Active in Cal Learn or another program, you must enter a status of Inactive Wait List before making them Active in the other program.

- To create the Inactive Wait List status choose **New** in the **Status Change** screen, enter the date and choose Wait List for **Status**, choose AFLP for **Funding Source** and for **Reason** choose # 2 Inactive Wait List. Click **Save**.

- If a client has already been Wait Listed and you want them to be Outreached the client should be given a **New** status of Inactive Wait List first and then given another **New** status of Outreached.

- If the client does not become Active, either add a **New** Status of Inactive Wait List and **Save** or delete the client.

- To view or print a list of Outreached clients by case manager, use the **Client Roster** report in the **Reports** module. To count outreached clients, run the **Caseload Analysis** report.

How to Wait List Clients

To **Wait list** clients, do the following:

- Wait listed clients may be assigned to a staff case manager or to a pseudo case manager ID which can be designed to prioritize wait listed clients without assigning them to a person. To prioritize clients, create and assign a pseudo-case manager ID code and name to denote each level of prioritization you wish to maintain on the wait list and enter these in the **Staff** file in **Setup** under **Utilities** on the **Lodestar Control Center**. For example, assign the following pseudo-case managers:

    - 901 High priority
    - 902 Medium priority
    - 903 Low priority

    - The purpose of doing this is to be able to obtain a listing of the clients at each priority level on the **Client Roster** report in the **Reports** module without attaching the client to a staff case manager. It is a good idea to assign a close numeric ID code sequence for the priority levels such as that shown above.

- To enter wait listed clients into Lodestar, case managers should fill out a Client Identification and Update form for a wait listed client, entering either the staff person's code or the appropriate pseudo-case manager, and write near the top of the form "Wait List."

- To mark a new client as wait listed in the computer, click **Add** in the **Clients** screen. Click the **Wait List / Defrd - No Case Mgmt Avail** check box in the **Enter Initial Funding Src** screen. Enter in the **CM** field a staff case manager or one of the pseudo-case managers you have designated to indicate wait list priority. Enter the data from the Client Identification and Update form into the **Clients** screen. After you finish entering the data, you will see that the client's status at the top of the screen indicates "Wait List," along with the funding source and status date.

- To wait list a returning client, fill out the Status Change form, **Locate** the client in Lodestar, bring the client's identification data to the screen and click the **Status Change** button in the **Clients** screen to open the **Status Change** screen. Click **New**, enter the client's Wait-List information on the left side and click **Save.**

- To change case manager of a wait listed client, fill out the Status Change form, go into that client's **Status Change screen** and click **New** to enter a status of Wait List with **Reason** #2 Inactive Wait List keeping the same case manager and then click **New** to create an Active Wait List status with the new case manager. You must keep the same case manager code when going from Active WL to Inactive WL. We highly recommend not changing the case manager until after the client becomes active.

- To Change Status from Wait Listed to Active, click the **Locate** pushbutton on the **Clients** screen and bring the client's identification data to the screen. Click on **Status Change**. Now click **New** to create a status change record. If the client will be made Active with the same case manager in the same funding source in which she or he was wait listed, simply choose Active as the status, the same funding source and CM and click on **Save** . A client may not go from the Active Wait List in one funding source to Active in a different funding source. If the client is changing case managers or funding source they must have a new status of Inactive Wait List with the first case manager before making the change.

- An Active Wait List client may not be terminated. The client must be exited first by one of the methods below. To exit the client, if the client was never Active and never became Active, for whatever reason, you have two options. First, If you would like to keep a record of the client but don't want them to show on any reports, you may give the client a new status of Wait List with reason for status change Inactive Wait List (always keeping the same case manager). The second option to take a client off the wait list is to delete the client using the **Delete** pushbutton from the **Clients** screen (see **Delete** under ***Client Identification***, above).

    - If the client was ever active in any program, then left the program and came back with a wait listed status, but never became active after that, it is possible to delete the Status Change record for the wait list alone. From the Status Change screen, make sure the Wait Listed record is selected, and then click on **Delete**.

- To view or print a list of wait listed clients, use the **Client Roster** report in the **Reports** module. Run the report for one or more of the pseudo-case managers or staff case managers you have assigned. For example, if you run the report for the case manager named “High Priority,” you will obtain a list of high priority wait listed clients. For more information about generating the **Client Roster**, see the section of the manual on the ***Client Roster***.

- To count wait listed clients, run the **Caseload Analysis** report. For further information, see the section of the manual on ***Caseload Analysis***.

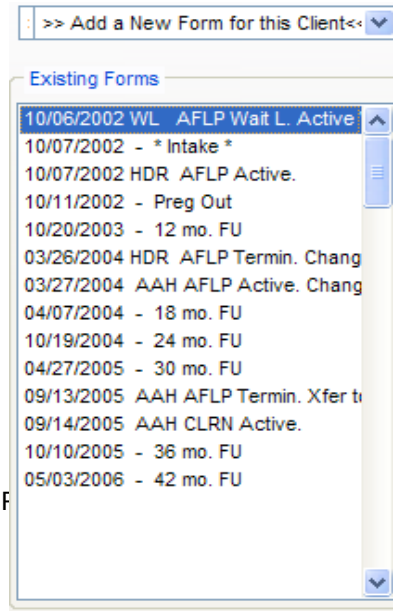
Only non-Cal-Learn clients can be waitlisted. For Cal-Learn clients the corresponding initial status is "Deferred - No Case Management Available." Lodestar handles this automatically. When you **Add** a Client Identification record for a new Cal-Learn client with the **Wait List / Defrd - No Case Mgmt Avail** box checked, the status at the top of the Client Identification screen will indicate "Deferred," instead of "Wait List" and the reason for the deferral will be entered as "2-Case management not available." Deferred clients may not change case manager while in that status.

Cal Learn clients who have become ineligible for Cal Learn may be put on a wait list for AFLP if they meet AFLP guidelines. If they then become eligible for Cal Learn again while still wait listed, you have two options to remove them from the AFLP Wait List. If you do not want to keep the record of the AFLP Wait List status you may delete that status. If you want to keep that status in the client’s history you must add a **new** wait list status with reason Inactive Wait List. You may then add the Active Cal Learn status.

Deleting Status Change Form

To delete a Status Change form, highlight the form in the **Status History** window on the right side of the screen. Then click the **Delete** pushbutton. A message will ask you to confirm that you wish to delete the selected record. Click on **OK** if you want to continue with the deletion. Otherwise, **Cancel**. Click on the **Close** pushbutton when you wish to return to the **Clients** screen.

Add New Form / Existing Forms



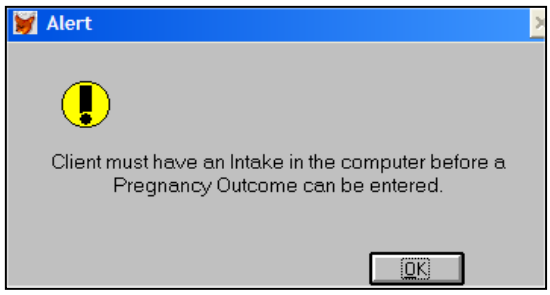
The left-hand section of the **Clients** screen is where you add and edit case management reporting period records from Intake, Pregnancy Outcome, Follow Up and Education forms.

Adding a record

To add a record for any client, that client’s identification data must be visible in the middle section of the screen. If it is not already there, use the **Locate** pushbutton at the bottom of the screen to retrieve it. Make sure the identification data showing belongs to the client for

whom you wish to add a case management reporting period record. Otherwise, you might add a record for the wrong client.

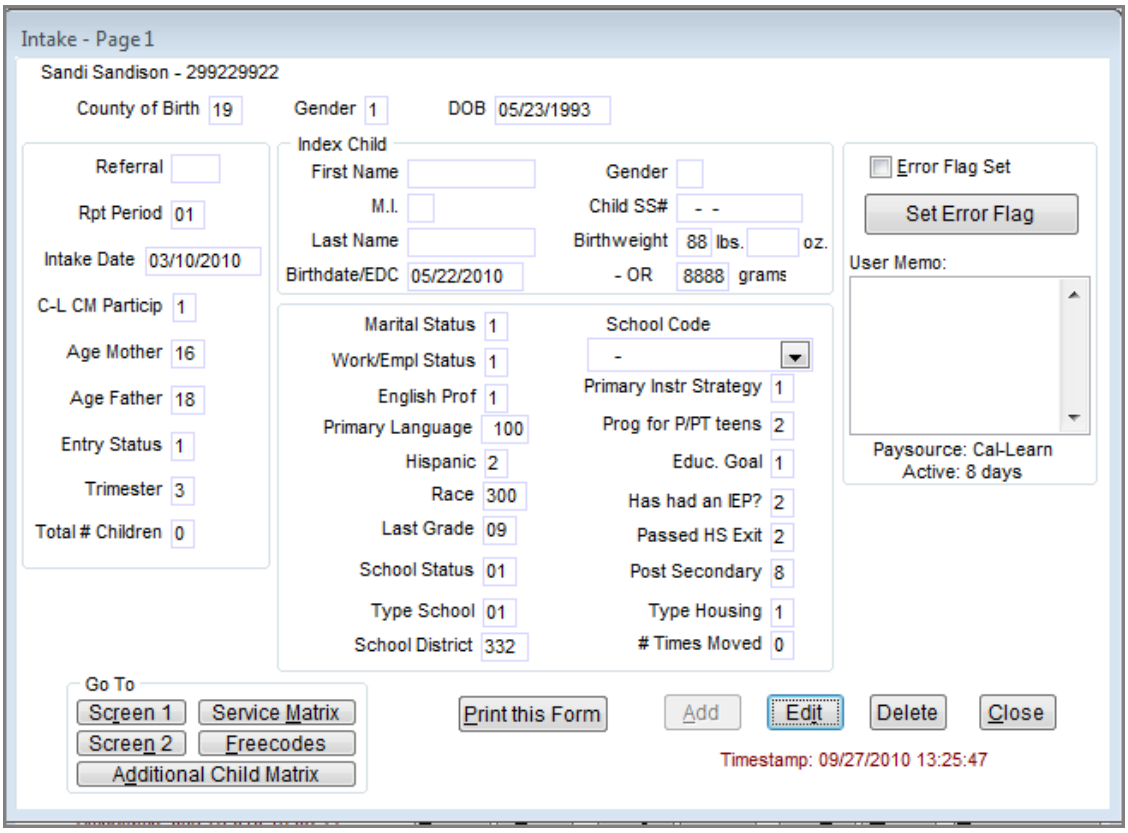
Once the client has been selected, the “Add New Form” pull-down list is available. Click on the black arrow to see the list of reporting period forms. Click on the reporting period for which you wish to add a record. Note, however, that clients must have an Intake form entered before any other reporting period form may be added.



Otherwise, Lodestar will generate an alert message telling you that the selected form may not be entered (see right). Similarly, Lodestar will generate an alert message if you try to enter a Pregnancy Outcome form for a Sibling client, since Pregnancy Outcomes do not apply to Sibling clients. Even if the Sibling becomes pregnant, you must first terminate the Sibling status and then create an Active AFLP or Cal-Learn status (i.e., terminate the client out of Sibling for reason Sibling became pregnant.) and only then will you be able to add the Pregnancy Outcome. Since the Sibling program was cancelled several years ago, you may have a former Sibling client applying for AFLP or Cal Learn who was not pregnant at the time he or she left the Sibling program. Please call tech support at 707-895-2510 for help entering that client’s new status into Lodestar.

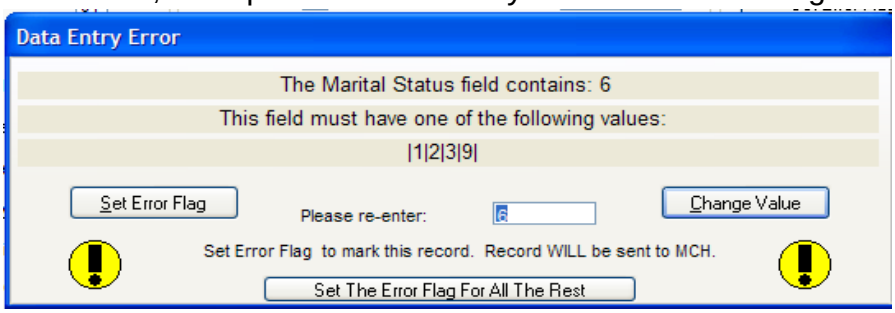
Once you have clicked on an appropriate record to add, the selected reporting period screen will appear, with all fields laid out in the order in which they appear on the form. (The following example will be for the Intake screen, but the information applies to the Pregnancy Outcome, Follow Up and Education screens as well, except as noted. Special instructions for using an added Intake form to change the Index Child are located at the end of this section under **Changing An Index Child**.)

The highlight will be in the first field for which data needs to be entered. The Client ID number and name, having been pre-entered (from the Client Identification and Update form), will appear at the top of the screen. The case manager ID has also been pre-entered but does not appear. (Depending on which form you are entering, other fields may be pre-entered as well.



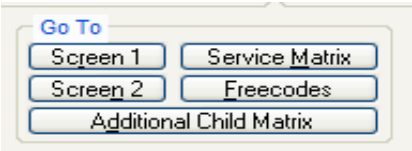
In this example above, the **DOB** and **Rpt Period** fields have been automatically filled in, in the former case because the client's birth date was already entered on the Client ID form, and in the second case because Lodestar knows that the Reporting Period code for Intakes is "01.") The first field for which data entry needs to take place is the field corresponding to the first data item on the form following the client's last name.

Enter all data as it appears on the form. Be sure to enter only values that are valid answers to given form items. If you enter an invalid code, or skip over a mandatory field without entering a value, a **Data Entry Error** window will appear that will show the valid values and ask you to enter one. There are two pushbuttons in the window; one labeled **Set Error Flag** and the other labeled **Change Value**. If you can supply a valid value (for example, if you made a typo), place it in the **Please re-enter** field. Then click on **Change Value**. The Error window will disappear and the corrected value will appear in the record. If you cannot enter a valid value (because the form contains invalid or missing data), you may leave the invalid or missing value in the **Please re-enter** field and then click on the **Set Error Flag** pushbutton. Once you are returned to the data entry screen, you will see an "X" in the **Error-Flag Set** box in the rightmost column of the screen, indicating the record's error-flagged status. If you need to error flag a record, please contact the case manager as soon as possible and get the correct data so you can update the

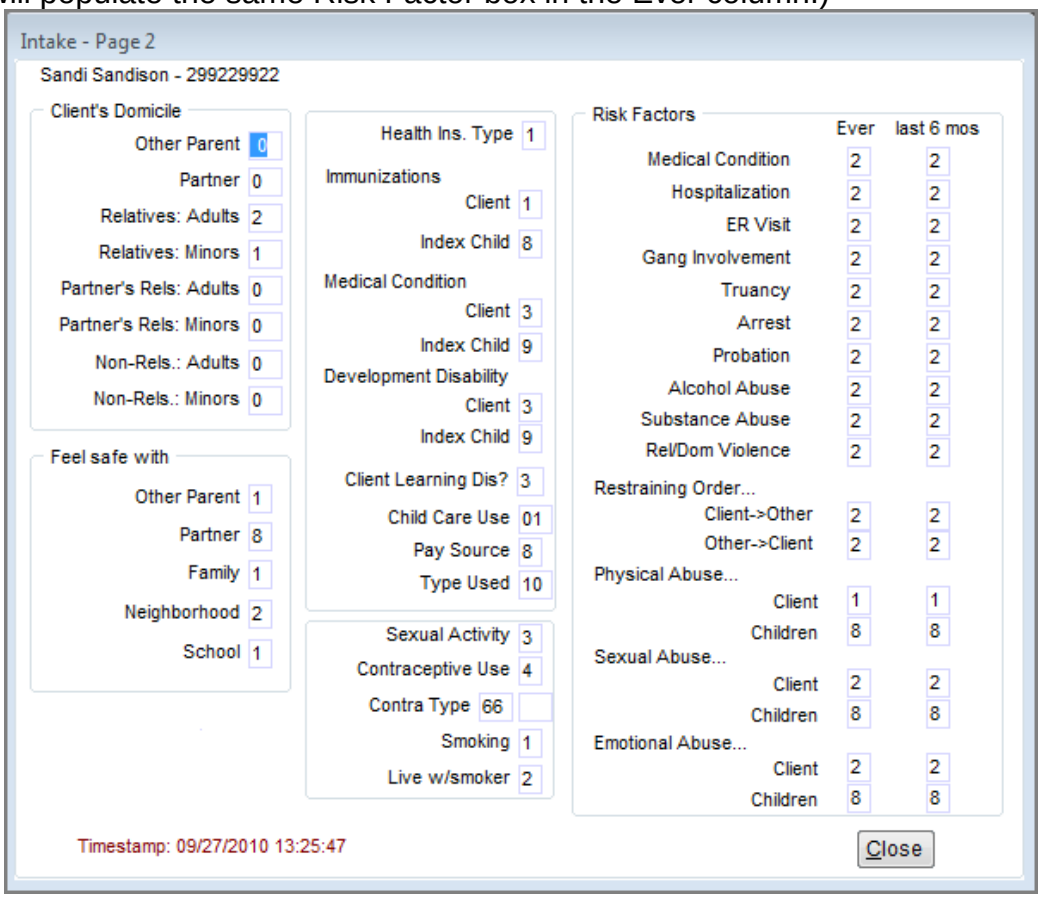


record and remove the error flag *before* sending in your monthly transmission to MCH (see ***Working with error-flagged records*** below).

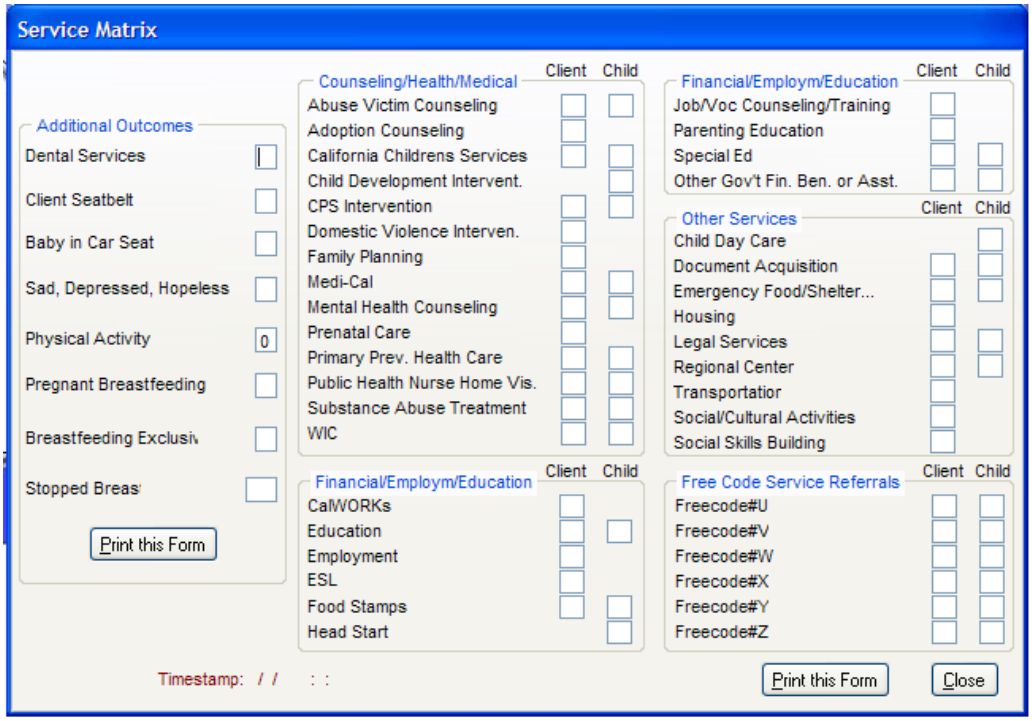
All reporting period screens except for the Education Screen are two-page screens. After you have finished entering all required reporting period data for the first screen, Lodestar will automatically take you to the second. (NOTE: Screen 1 and Screen 2 of each of the reporting period screens *do not* correspond to the pages of the corresponding forms, which are usually 3 or 4 pages long. The fields on the screens, however, are in the same order as the data items on the forms.) It is also possible to go directly to a particular page by using the pushbuttons in the "Go To" area in the lower left corner of the screen. (Once you are in one of the other screens, clicking on **Close** will return you to Screen 1.)



Screen 2 is completed in the same manner as Screen 1.
(Note that any time you enter a 1, a 3 or an 8 in the last 6 mos column of Risk Factors, the same code will populate the same Risk Factor box in the Ever column.)

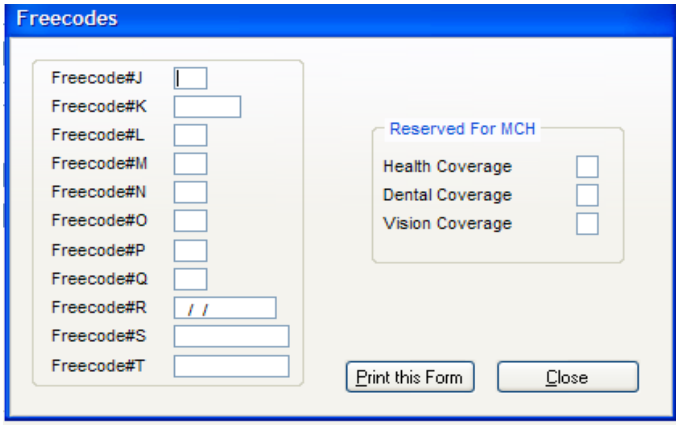


Once the last item has been filled in with a valid entry, Lodestar will automatically take you to a blank **Service Matrix/Additional Outcomes** screen. You need to enter the Service Matrix and Additional Outcomes data for each reporting period. Enter data in all fields, using the same techniques as described above. After you have completed the last field on the form (all of the fields under Free Code Service Referrals in the last section are optional), click on **Close** to return to the reporting period record.



If you are maintaining free codes on the Free Codes form, click on the **Freecodes** pushbutton to access the Freecodes screen. Make your entries, and click on **Close** to return to the reporting period record.

If you have questions about how or why **Freecodes** would be used please call the Lodestar Tech Support Line for more information.



Additional Child Matrix

Finally, if you need to enter information on children other than the Index Child, click on **Additional Child Matrix** to enter data from the Additional Child Matrix form. However, if your client gives birth to a non-index child while in the program, fill out the **Pregnancy Outcome** instead and mark it as

Non-Index. This will automatically fill the information on the non-index child into the **Additional Child Matrix.**

Additional Child Matrix

Additional Child Matrix
(Non-Index Children Only)

	Name First	MI	BirthDate	Child Gender	Birthweigh lbs. & oz.			Date LostCustody*	Date ChildDied*
1	Evan		Ramason	05/14/2007	2	5	10.0	2551	/ /	/ /
2				/ /					/ /	/ /
3				/ /					/ /	/ /
4				/ /					/ /	/ /
-				/ /					/ /	/ /

☑ = Previous Index Child

*If Applicable

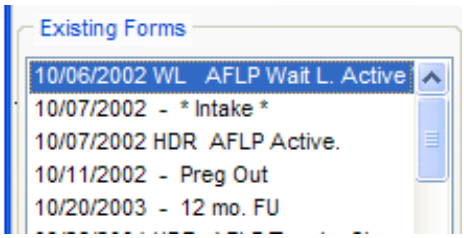
Ramah Ramason - 344344344

Current Index Child

First	MI		Birth Date	Gender	Birthweight
Mira		Ramason	04/06/2010	1	2778 grams

Print Edit Close

NOTE: If you are entering a Pregnancy Outcome, and have specified that the Type of Birth is "2-Multiple Birth," Lodestar will automatically take you to this screen as soon as you click on the **Save** pushbutton from Screen 1after filling out all the rest of the Pregnancy Outcome, Service Matrix and Additional Outcomes. The cursor will be in the first available field and the Date of Birth field for that record will have been automatically filled in with the date of birth you entered on the Screen 1. Just enter the name and birth weight of the second child (twin), and, if necessary, all information for any other child(ren) born (i.e. triplets through quintuplets) on the next available lines, as space allows. Click on **Save** when you are finished and then on **Close** to return to the Pregnancy Outcome Screen. (See above under **Children** in the ***Client Identification*** section for more information on using the Additional Child Matrix screen.)



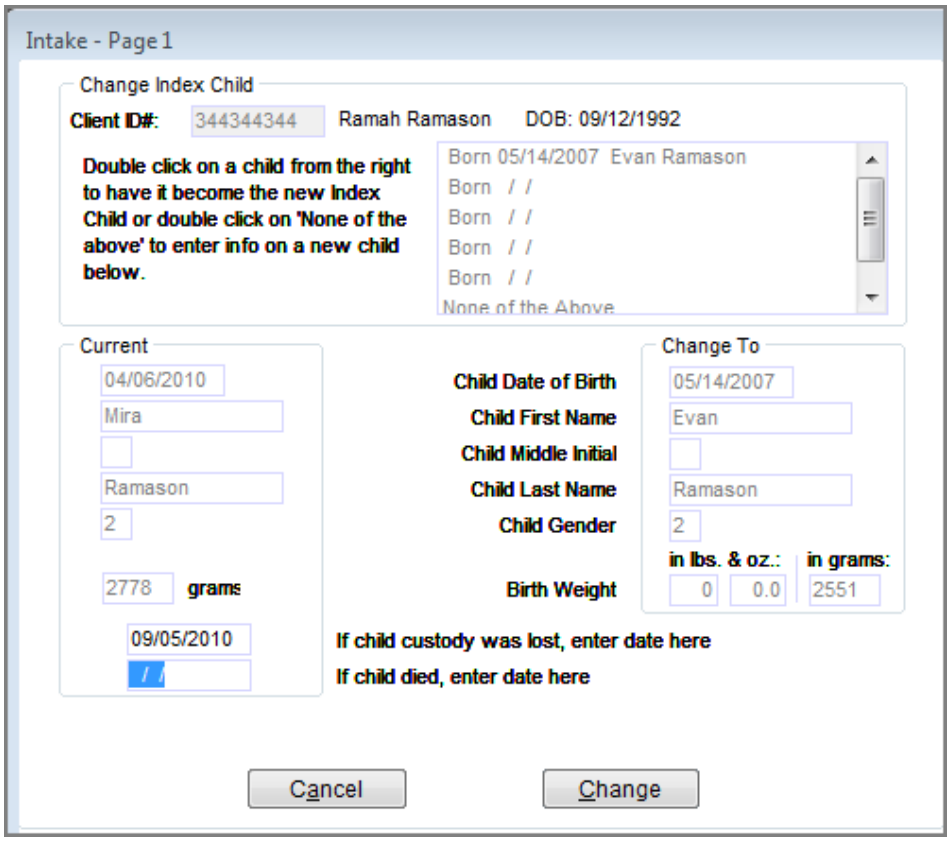
After completing the record, you have the choice to **Save** or **Cancel** it. The record will not be saved unless you click **Save**. Then click on the **Close** pushbutton to close the case management reporting period screen. The record you added now appears in the **Existing Forms** list at the left of the **Clients** screen.

Records for all other case management reporting periods – Pregnancy Outcomes, Follow-ups and Education forms – are added in a similar fashion.

Changing an Index Child

In the event that the Index Child of a client dies or the client loses custody of the child, it is necessary to change the Index Child information in Lodestar if a pregnant or parenting client is to continue in the AFLP or Cal-Learn programs. This is because Lodestar uses Index Child data as a basis for tracking client information throughout the client's involvement in case management. For example, the Index Child's date of birth is used to determine when Follow Ups are to be done. Note, however, that unless there is a death or loss of custody, the Index Child should remain the same *throughout* the client's involvement with case management, even if the client transfers to a new agency or quits a program and then comes back after an extended absence with additional children.

To change an Index Child in Lodestar, it is necessary to add a new Intake, following the instructions above. Lodestar will give you a message saying, "Client already has an Intake, add a new one anyway?" Click on **OK** to proceed. Enter data as usual. When you get to the Index Child data items, highlight or Tab to the Birthdate/EDC field and enter the Date of Birth or EDC (if the client is pregnant) of the new Index Child. Because this date will be different from the original child's DOB, Lodestar will pop up a message box saying, "Client already has an Index Child. Change Index Child?" Click on **OK** to continue. Lodestar will then show you a Change Index Child screen:



This screen will allow you to see the current Index Child information, select a new Index Child from a list of the client's other children or add completely different information on the new Index Child.

To select one of the client's other children to be the new Index Child, double-click on that child's listing in the box in the upper right area of the window to bring the name and birth weight information down into the "Change To" area beneath. Otherwise, double-click on "None of the Above," and enter the new first name, last name, and birth weight if any, or enter "88" in the lbs. field if the child is not yet born. Then Tab to or highlight one of the fields which indicates why the Index Child is being changed, either because custody was lost or because the child died, and enter the date on which this occurred. Click on the **Change** pushbutton, when you are through (or **Cancel** the change). Lodestar will give you a message indicating that the change has been completed. Hit any key to return to the Intake Screen to complete data entry on the remaining fields. The next time you enter the Additional Child Matrix, you will see that the old Index Child has been added to the list with a checkmark next to the record indicating the **Previous Index Child** status, and that the date of death or loss of custody field is filled in. Likewise, the new Index Child information is listed at the bottom of the Matrix, and if this child was previously in the list of Non-Index children, that record will have been removed.

Editing or deleting an existing case management record

To edit or delete a case management reporting period record, double click the record you wish to edit in the **Existing Forms** window. The first screen for that record will come to the screen. If you wish to make changes to the record, click on **Edit**. The highlight will appear in the first field. Press Tab until you get to the field you want to edit (or directly highlight that field or portion to be edited) and make your changes. Use **Edit** only to correct mistakes or clear error flags. Each record is a snapshot in time. Always create a new record in Lodestar when a new form is called for.

If you need to correct data on **Screen 2**, the **Service Matrix**, the **Freecodes** form or the **Additional Child Matrix**, click on the appropriate pushbutton in the **Go To** area of the screen. Make your changes or additions in the same fashion as above. You will need to click on **Close** to get back to the reporting period record.

After completing your corrections, click on the **Save** pushbutton at the bottom of the screen. Note that no changes in any of the screens associated with the reporting period are saved until you click on **Save**, except for those made to the **Additional Child Matrix** screen, which has its own **Edit** and **Save** pushbuttons. Likewise, any changes you have made to the Additional Child Matrix can only be canceled by using that screen's **Cancel** pushbutton, not the one on the reporting period screen.

If you want to delete a reporting period record, double click the record from the **Existing Forms** scrollable list, click on the **Delete** pushbutton once the record you wish to delete comes to the screen. A message will ask you to confirm that you wish to delete the record. Click on **OK** to confirm the deletion (or on **Cancel** to leave the record intact).

*WARNING: Only use the **Delete** pushbutton on the **Intake**, **Pregnancy Outcome**, **Follow Up** or **Education** screen for the individual reporting period record you wish to remove. DO NOT use the **Delete** pushbutton on the **Clients** screen, as this will delete EVERYTHING in Lodestar related to the client whose Identification data is on the screen, including every reporting period form, every status change form, and every other piece of information about the client. Restoring information for*

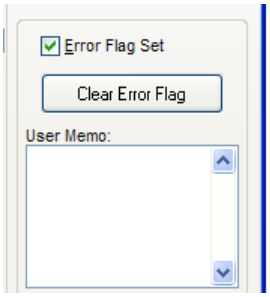
a client who has been accidentally deleted may require manually re-entering every single form ever collected on the client!

Working with error-flagged records

Error-flagged records are case management (reporting period) records that contain a data problem. Lodestar automatically error flags records in which it detects a data problem. In addition, the user may manually error flag a record while entering data to identify it as one that needs correcting later.

Lodestar automatically error flags records if the user enters and lets stand a missing or invalid value in a reporting period record. Error-flagged records need to be updated and the error flag removed as soon as the correct information can be obtained and before the monthly MCH transmission is sent. To find all error flagged records run the **Data Cleaning Report** in the **Reports** module. To remove an error flag, use the **Locate** pushbutton on the **Clients** screen either to locate a specific client whose record(s) you know to be error-flagged or to locate all such clients. If you locate all error-flagged records, double click the client in the scrollable list whose error-flagged record(s) you want to work with this will bring the client's identification data to the screen. Examine which record(s) in the **Case Management** window are error-flagged, double click on the error-flagged form you wish to work with to open it.

Removing the error flag from a record



Highlight the record and click on **Edit**. Clicking on **Clear Error Flag** will show you the error and allow you to make the edit. (You may also highlight the field and edit it directly.) Once valid values are entered for all fields, Lodestar will automatically remove the error flag and the checkmark in the **Error Flag** box will disappear. See **Add New Form / Existing Forms** for more information.

It is important to **Locate** all error-flagged records and correct those that contain data errors every month *before* sending your transmission to MCH.

Cal-Learn Forms

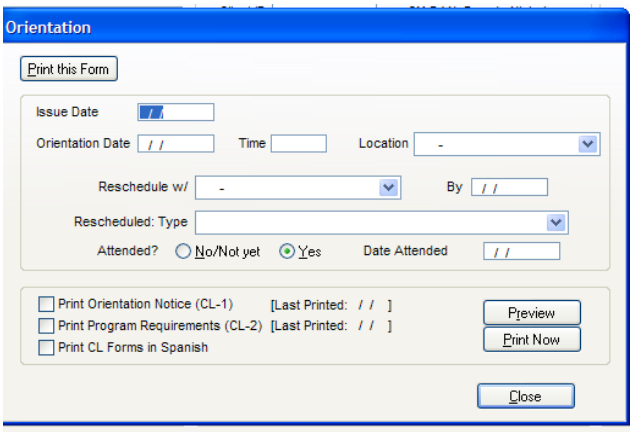
In the **Cal-Learn Forms** section of the **Clients** screen, information about a client's orientation, participation problems, and report card schedules and outcomes may be entered and edited. CL forms 1, 2, 3, 4, 8, 9 and 11, and NA 844 (the Adequate Progress NOA) may also be generated in this section. Each of these forms may be printed in Spanish.

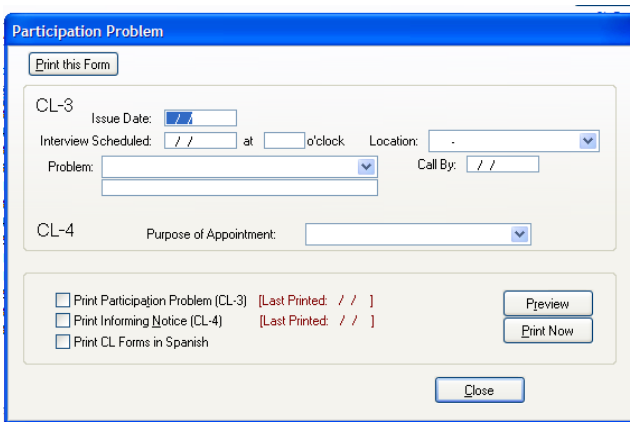
To add or edit any data in the **Cal-Learn Forms** section, first bring the client's identification record to the screen. Click on the **Locate** pushbutton and enter your search criteria in the **Find a Client Record** window. Once the client's

record is on the screen, the pushbuttons in the **Cal-Learn** section are active.

Orientation and Participation Problem

To enter or edit information from the Lodestar Cal-Learn Orientation / Participation Problem form, click on the section of the form desired. (To enter/edit both Orientation and Participation problem data, you must do each section separately in turn.)

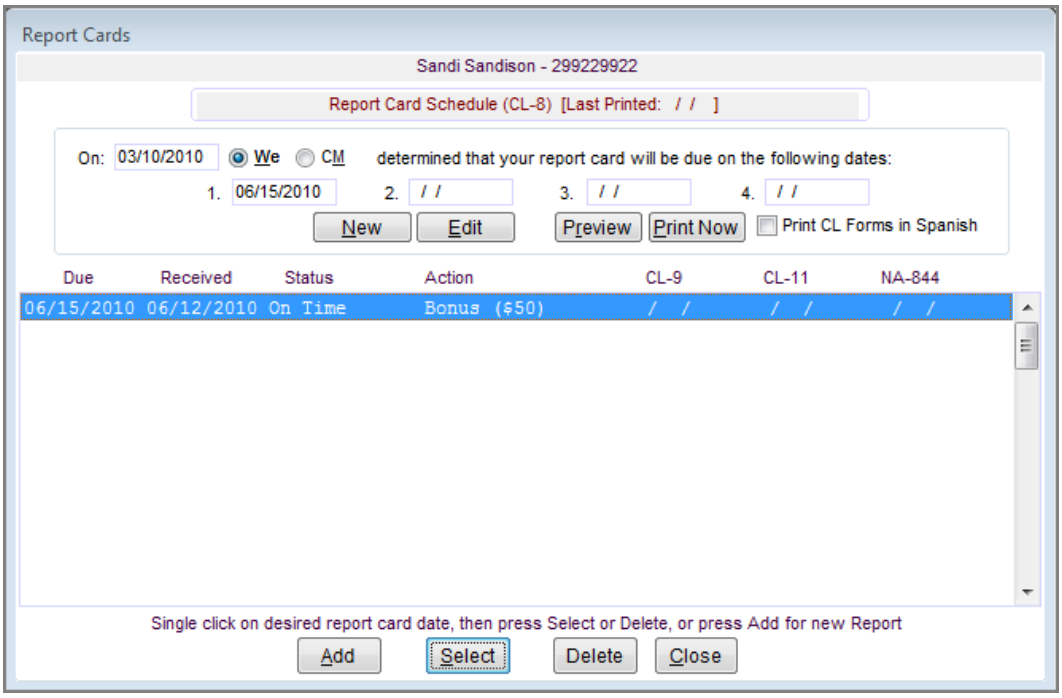




Data entry is done using the usual data, pull-down, radio button and checkbox fields, except that for the **Orientation** and **Participation Problem** screens, there is no **Save** or **Cancel** pushbutton but simply a **Close** pushbutton. To make corrections or enter new data, just type over the old data or blank field or use the pull-downs to change the selected items. (This means that only the most recently added or edited Orientation or Participation Problem information is kept, so no historical data is available.) Click on the checkboxes available to generate the form(s) CL-1 and/or CL-2, or CL-3 and/or CL-4, click on that checkbox as well. When you are done, click on the **Close** pushbutton to save the data. If you want to delete data, you will have to manually delete it from each field, then click on **Close**. For tips about how to delete data from a field, see ***Lodestar Basics***.

Report Cards

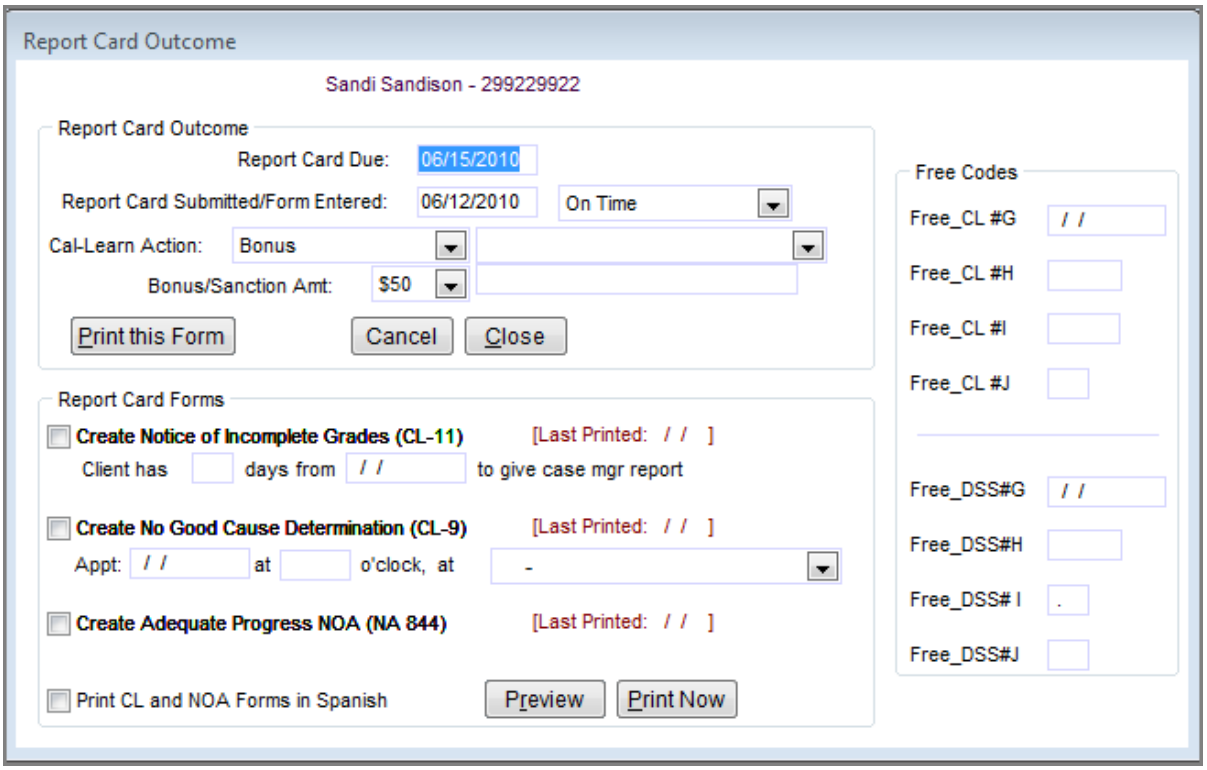
To enter or edit data from the Lodestar Report Card Schedules and outcome forms, click on the **Report Cards** pushbutton. The **Report Cards** screen will appear:



The screen is divided into two parts, each with its own set of pushbuttons to control available actions. In the upper portion of the screen you may create a **New** report card schedule or **Edit** existing information by clicking on the pushbutton desired. The **New** and **Edit** buttons become **Cancel** and **Save** buttons, respectively. Make your additions/changes and when you are finished, click on **Save** to save all edits. Any new due dates you have added will appear in the scrollable list of report card dates in the lower portion of the screen, in chronological order. If you have edited any dates, a warning screen will appear for each asking if you wish to replace the old date edited with the new one. Click on **Yes** to replace, or **No** to leave the original date in the list. Note: if you are trying to insert a single new date into the list without replacing any of the old ones, use the **Add** button in the lower section of the screen.

The lower portion of the screen allows you to track and manage client report card outcomes. Click on **Add** to create an outcome for a report card which is not listed in the pull-down list of due dates, or else click on the date for the form you want and then click on **Select**.

A **Report Card Outcome** screen will appear which will be blank if you are adding or filled in with data for that report card outcome if you are editing.



Add or change data as needed in the upper **Report Card Outcome** part of the screen. You may then click on the checkboxes in the lower **Report Card Forms** section of the screen to generate the listed forms, which will be made available depending on the choices you've made in the upper section (e.g. you will not be able to generate a CL-9 [No Good Cause Determination], if you've selected a $100 bonus as the **Cal-Learn Action**). If you are using any report card Free Codes, highlight each field desired in turn in the **Free Codes** column on the right of the screen, and enter data as needed. Once you are finished with all data-entry, click to **Preview** the selected form(s) or **Print Now**, as desired. (Both actions will also save your edits.) Then click on **Close** to return to the **Report Cards** screen (and save your edits if you did not preview or print any forms). Note: because the actions above also save the current data, you may only **Cancel** your edits *before* you **Close**, **Preview** or **Print Now**.

From the Report Cards screen, click on **Close** to return to the **Clients** screen.

Note: Bonus and Sanction data is not transferred to the Stat 45 because different counties apply bonuses and sanctions in different ways.

90 Day Participation Period

The purpose for entering the 90 day participation period dates is to prevent a reminder that a report card is due from appearing on the *Follow Ups Due Report* during the 90-day period. You may also have Lodestar function as a calculator in computing the end of the 90-day period if you enter the beginning date and the number of days, if any, when a break in aid occurred.

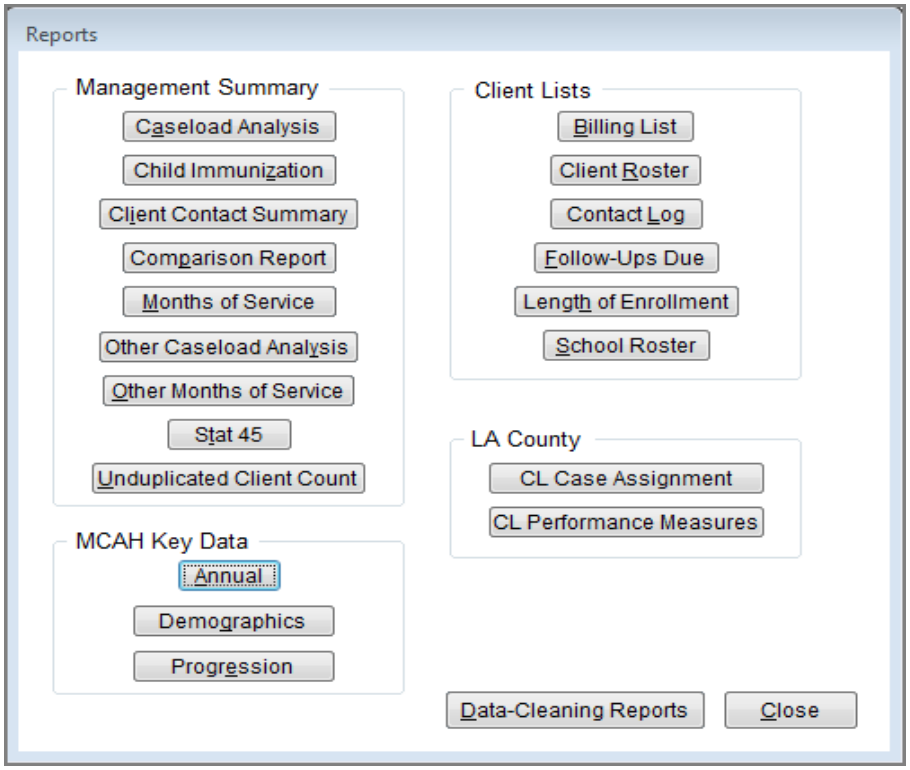
To enter or edit the dates, be sure the client's identification data is showing in the middle part of the screen. Click on the **Change** pushbutton at the bottom of the **90 Day Part**. screen section. You need to know when the starting date is for the 90-day period. It is likely to be the first of the month following orientation, or the first of the month following sending of the CL-2 form. Enter the start date in the **Begin** field. The **End** date will be automatically calculated. If there has been a break in program participation (of less than 90 days) during the 90-day period, enter the number of days the break lasted in the **Days Extended** field. A new end date will be automatically calculated, as will the number of **Elapsed Days**, counted from the client's date of activation. Click on **Save** to complete your edits. (Note that there is no **Cancel** button. If you wish to undo any changes, you will have to re-enter the original values or manually delete data from all fields before you hit **Save**.)

Medi-Cal

See the Lodestar Medi-Cal Verification Processing Manual for more information

Reports

The Reports section of Lodestar is what makes all the hard work of data entry worthwhile. Lodestar reports provide a wealth of information that can help agency staff work more effectively. Lodestar includes several standard reports of commonly requested information. (In addition, Lodestar includes a powerful customizable query and report generator in the **Ad Hoc** module, discussed in ***Ad Hoc***, below.)

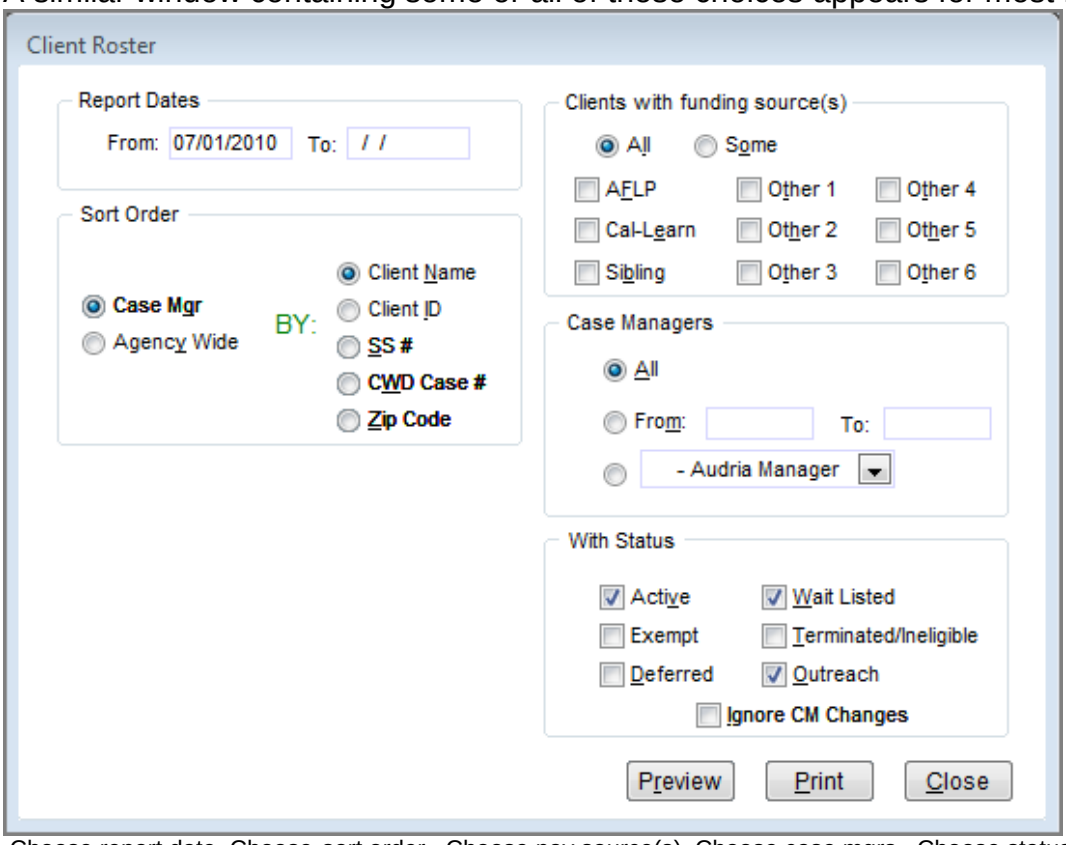


Lodestar **Client Lists** and **Management Summary** reports are generated using a standard set of windows that collect information from the user regarding some or all of the following--which date(s), case manager(s), pay source(s) and status(es) to include, what sort order to use, and how to print the report. A full explanation of these options is given under ***Client Roster*** below. For other reports, only significant differences are explained. Lodestar also includes a module for running **Data Cleaning Reports**, which enable users to track problems and maintain an error-free database, **MCAH Key Data** reports, particularly helpful for AFLP agencies, and **LA Case Assignment** and **Performance Measures**, a special section of reports for agencies in Los Angeles County.

Client Lists

Client Roster

Lodestar can generate a **Client Roster** that includes the client's name, Lodestar ID number, CWD case number, social security number, date of birth, age, address, phone number, status and the indexed child's name, birthdate and age. There are several choices as to how to generate the roster as shown in the window below, which appears after you click the **Client Roster** pushbutton. A similar window containing some or all of these choices appears for most Lodestar reports.



Choose report date Choose sort order Choose pay source(s) Choose case mgrs Choose status

In the upper left you select which date(s) to run the report for; Below that you choose the sort order for the report, in the upper right, you choose which pay source(s) to run the report for, in the middle right, you select which case manager(s) to run the report for; and in the lower right, you choose what status(es) to use in the report. Pushbuttons at the bottom allow a choice of previewing the report (on the screen) or printing it out.

For the **Client Roster**, enter in the upper left corner the dates between which all clients will be listed who had the status(es) chosen in the lower right section. You will be shown a list of clients who had those statuses at any point during the listed range of dates, regardless of whether their status changed again before the end of the range. If you leave the second date in the range blank, you will be shown a list of clients who had the status(es) chosen *as of* the single date listed. To see how these actions differ, consider the following example: Client A was made Active on 04/01/09 and remains active through the end of the year. Client B was made Active on 12/15/08, left the program on 05/01/09, was reactivated on 11/01/09 and left again on 12/15/09. If we run a

Client Roster for the range 01/01/09 to 12/31/09 (the entire year), we capture both Clients A and B, since both were active at some point during this time, even though Client B is no longer active by the end of the year. If we run the roster for the range 06/01/09 to 10/01/09, we will capture Client A but not Client B, because Client B was not active at any point during this period. If we run the report for the single date, 03/01/09, we will capture Client B, but not Client A, since *as of* 03/01/09, Client A had not yet been activated and would not be for another month. And, finally, if we run the report for the single date 12/31/09, we capture Client A but not Client B, since *as of* this date, Client B had been out of the program for 16 days.

Under **Pay Source**, you may select to generate rosters for clients funded under **All** pay sources or **Some** pay sources by clicking on the appropriate radio button. If you select **Some** pay sources, you must then click in the check box(es) to indicate for which pay source(s) you want rosters generated. If you only want to generate a client roster for Cal-Learn clients, for example, click the **Some** pay sources radio button and then click the **Cal-Learn** check box.

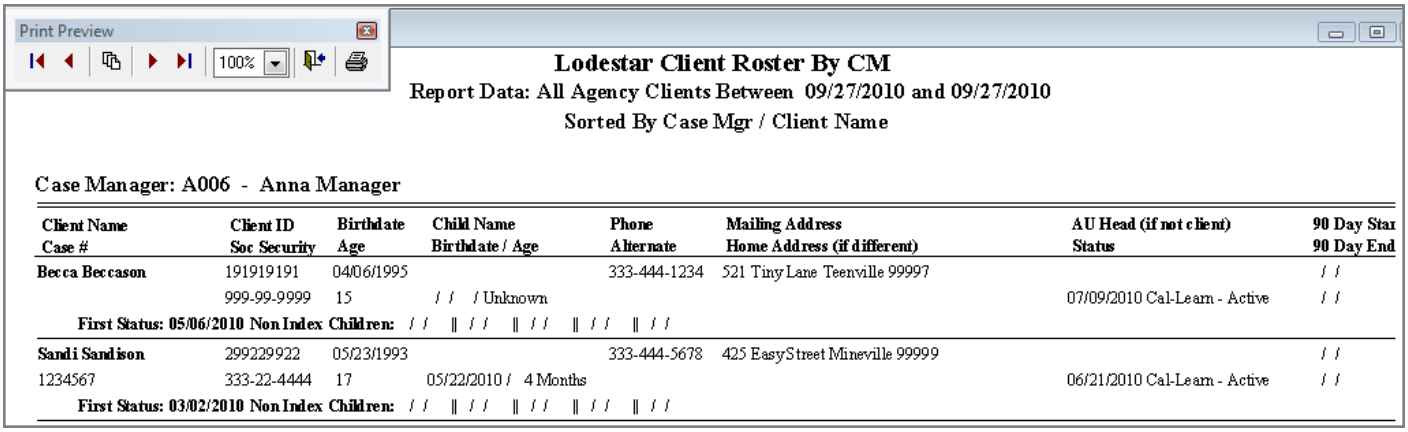
Under **Case Managers**, first determine whether to generate a roster for all case managers, for a range of case manager ID codes, or for a single case manager, as indicated by the three radio buttons. **All** is the default. If you wish to generate a roster for a range of case manager ID codes, click on the middle radio button. A range suggests a numeric range (e.g. case managers 300 - 390), though alphabetical or alphanumeric ranges are also permissible (e.g. case managers AAA - GGG or case managers A100 - G900). Use the mouse or press Tab to get to the **From:** field and enter the beginning value for the desired range of case manager ID codes. Tab to the **To:** field to highlight it, if necessary, and enter the ending value for the range. To generate a roster for a single case manager, click on the bottom radio button. The pull-down list will now be accessible, so click on the down arrow, and click on the case manager you want to select.

Under **With Status**, click the appropriate check box(es) to mark the status or statuses you want in your Roster list. Active, Wait Listed and Outreach are automatically checked.

In the middle left, make your selections for the sort order for the report (i.e., the order in which to list the clients). Two sort orders are available. The options for the first are by **Case Mgr** or **Agency Wide**. **Case Mgr** is the default as it is what you are likely to use most of the time. It will generate a client roster for each case manager, separated by page breaks. **Agency Wide** will produce a single roster for the entire agency.

The choices for the second sort order are BY: **Client Name** (the default), **Client ID**, **SS #**, **CWD Case #** or **Zip Code**, within the first sort order selected above. If you wish to change the second sort order, click the radio button desired. As an example, if you wanted to generate a roster by case manager and for each case manager to list clients in zip code order, you would click first in the **Case Mgr** radio button and then in the **Zip Code** radio button.

Now you have a choice as to whether to **Preview** or **Print** the roster(s). Clicking on **Preview** will show the roster(s) on the screen, one page at a time, in a window called **Page Preview**. Initially a small portion of the page will be shown and you can use the Maximize button to enlarge it to full screen.



Manipulating the Image

If you wish a closer look, you can click on the down arrow in the small zoom window in the Print Preview window and choose up to 500%. Now a portion of the page becomes legible. The zoomed-in screen has both horizontal and vertical scroll arrows and scroll boxes. By using them, you can access different parts of the page to examine the data in detail. If you wish to zoom out again to see the entire page, click the down arrow next to the percentage zoomed.

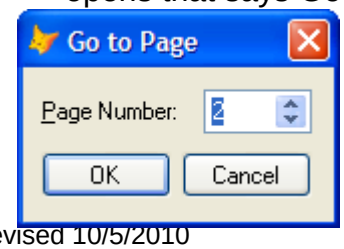
Another way to zoom in is to place the mouse pointer on any part of the data. It will assume the shape of a magnifying glass: 🔍. By clicking the mouse button, you will zoom in to that part of the page and a certain percentage will show next to the down arrow (the mouse pointer reverts back to its usual form). To zoom back out simply click again on a portion of the page. The mouse pointer will again turn into a magnifying glass and Zoom will be written next to the down arrow you can use to change the percentage of zoom.

Choosing Which Page to Show

There are two ways for you to choose which pages to see in a multi page report.

1. To the left of the Zoom box you will see two arrows pointing right and two pointing left. If you are at page 1in the report, the two arrows pointing right will be red. To move to the next page, click the right pointing arrow on the left. You can continue page by page this way. Now all of the arrows should be red because you could use any of them to move forward or back in the report. To go immediately to the last page click the right pointing arrow on the right which has a vertical line beside it. When you are on the last page of the report only the two left pointing arrows will be red. The left pointing arrows move you back through the report similarly to the forward movement of the right pointing arrows.

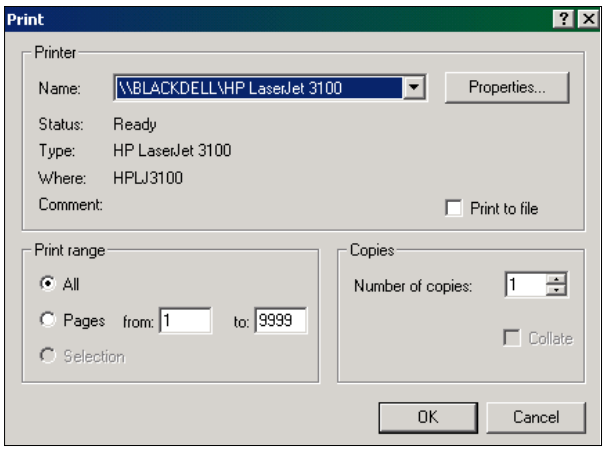
2. In between the right and left pointing arrows you will see an icon of three little pages of paper. If you wish to go to a specific page number, click on that icon. A small window opens that says Go to Page.



Below that you will see Page Number and a number with up and down arrows next to it. You can either type the desired page number in that space or use the up or down arrows to move to the page number you want.

After you are finished previewing the report, click on **OK** to return to the report window.

To print the roster, click the small printer icon on the Print Preview window. This will immediately print all pages of the report. If you only want some of the pages to print click on **Print** from the Report window. A Print window appears that enables you to select settings for the print job. Most of the time you will probably not have to alter the default settings, but you can if you need to.



The Default Printer that has been set up through Windows is shown at the upper left. If you wish to direct the report to a different printer (for example, to a local printer instead of a network printer), you can change the printer by clicking on pull-down list of printers.
Next you can select which pages to print in the **Print Range** section. The two available choices are **All** or **Pages**, with **All** as the default. If you want to print a range of pages, you can click in the **Pages** pushbutton and then enter the range of pages desired in the **From** and **To** fields. Note that you may print a continuous range of pages, e.g. 4-12, but not, say, pages 1, 3, 7, and 8-11. You must combine print requests to do this.

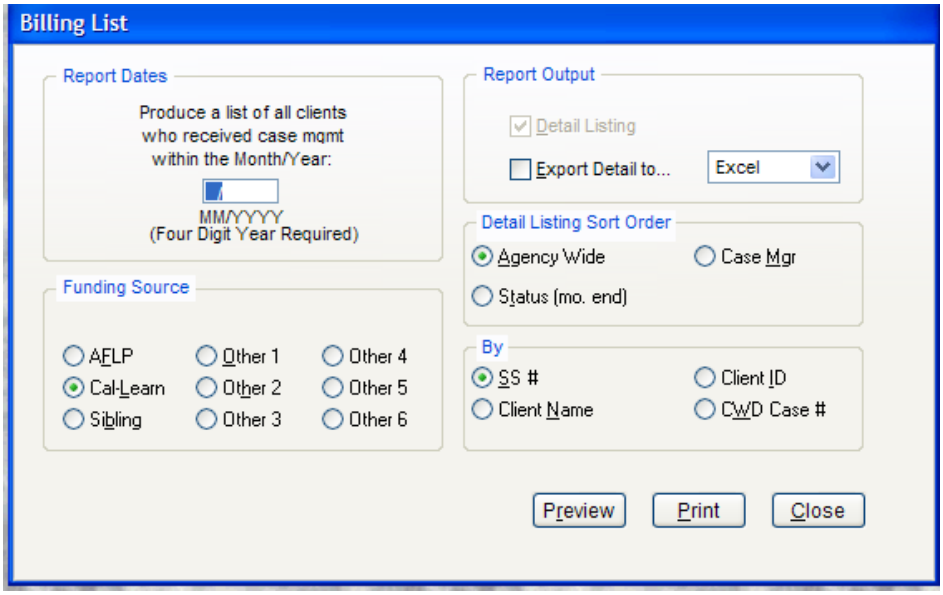
Select the number of **Copies** to print. Enter the number needed if more than the default of 1. If you are printing more than one copy, you can click in the **Collate copies** check box to make sure the output is collated.

If you need to make other choices relating to the printer, the page orientation or the paper size or source, you can click the **Properties** pushbutton at the right side of the screen. This will pop up a **Properties** dialog box.

It is not recommended that you change defaults on this screen while running Lodestar reports, as all values should be correctly set automatically. You would change these other defaults, and access additional options concerning graphics and print quality through the **Options** pushbutton, only if you are creating your own custom reports.

Click on **OK** to close the dialog boxes and start the printing. It is a good idea to be sure that your printer is loaded with enough paper before you start. The Client Roster and other Lodestar reports can run 100 pages or more in large agencies. If your printer runs out of paper while the report is printing, you will receive a message, but you'll avoid a hassle if you check the paper supply first.

Billing List



The **Billing List** lists all clients of the selected funding source who received case management during a user-selected month. It includes clients who became ineligible, exempt or deferred during the month, because billing is permissible for the month in which these events occurred. (Clients should never be terminated or made ineligible on the first of the month.)

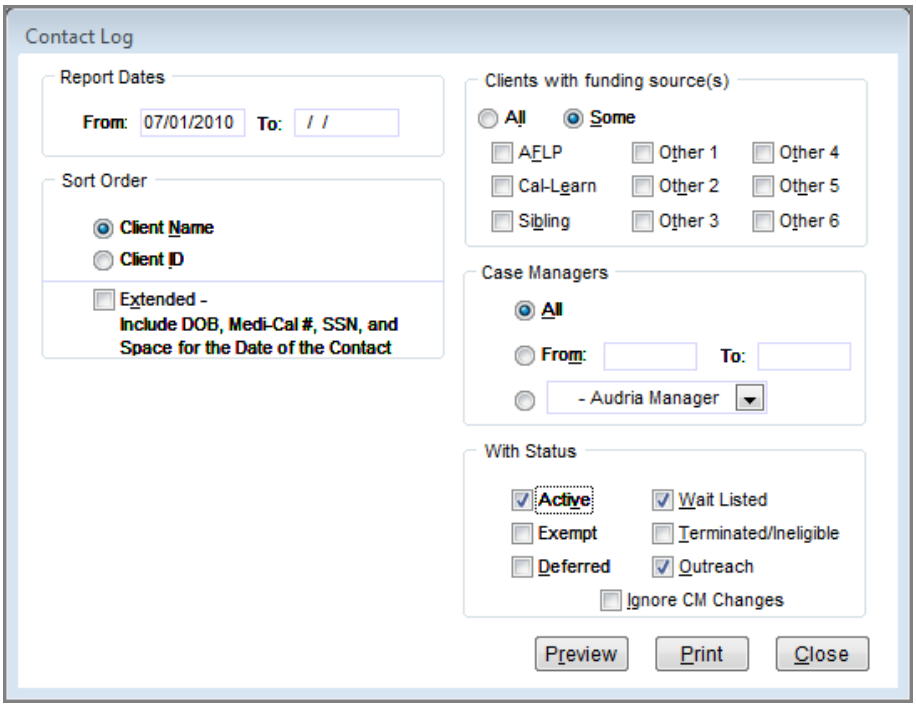
The list can be generated **Agency Wide** or sorted by **Case Mgr** or by ending status [**Status (mo. end)**] (with a different page for each case manager or ending status). Names can be listed in **SS #**, **Client Name**, **Client ID** or **CWD Case #** order.

Under **Report Output** are two options, either or both of which may be selected. **Detail Listing** (the default) allows you to **Print** or **Preview** the Billing List specified.

Export Detail to... allows you to export the list to an Excel file (or one of several other data formats) by selecting **Print** (i.e. this acts as a "save new file request," and pulls up a **Save As** dialog box). (A manager might want to work with the data in one of the available formats to combine it with data obtained from other sources.)

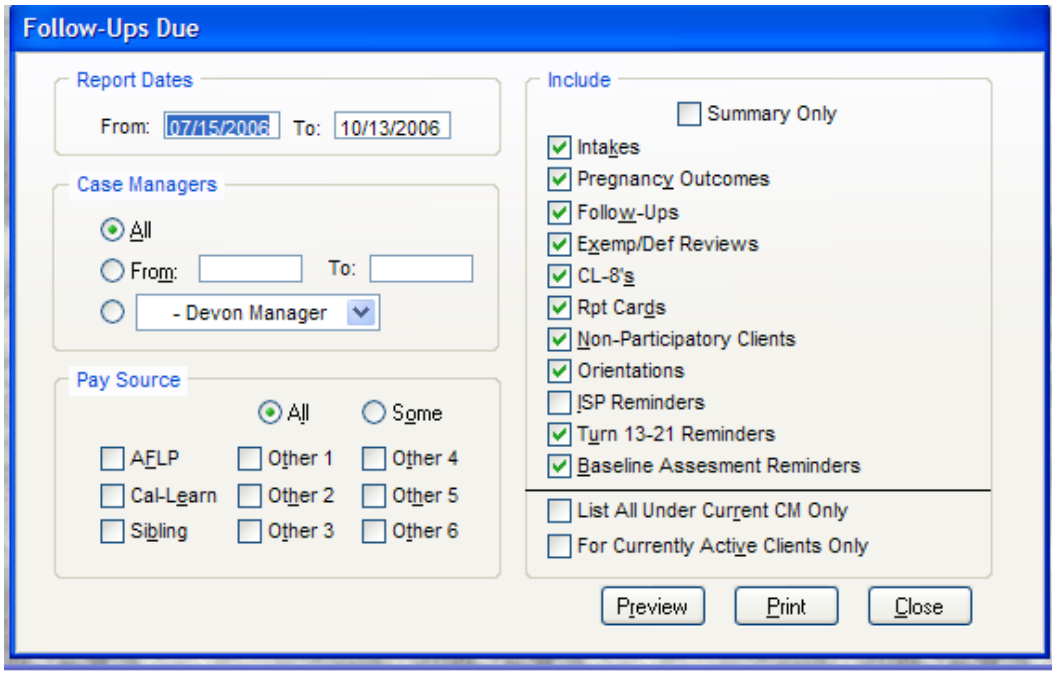
For more information about how to use the Monthly Billing Report, see the section of the User's Manual entitled ***What Lodestar Reports to Generate, When*.**

Contact Log



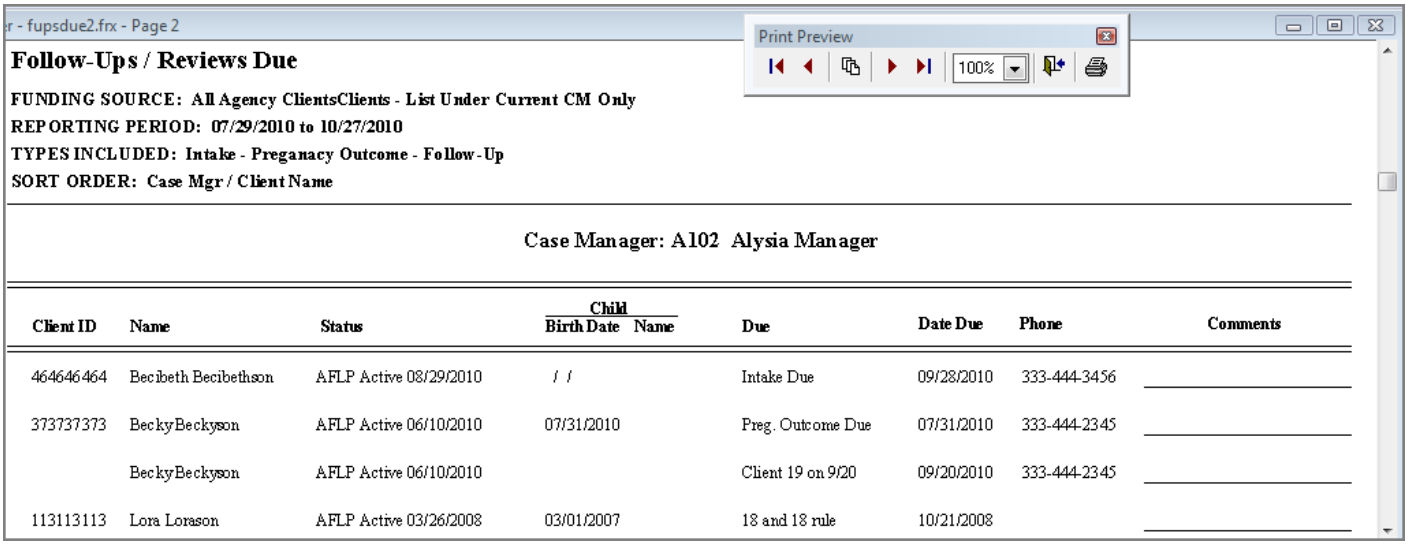
The **Contact Log** report is a table of clients with status(es) chosen *as of* selected date(s) for use by case managers in tracking type and length of contacts with their clients. A legend at the top of the report indicates how the type and time columns are to be filled out for each client. The report is in order by case manager with an option for one sort order within that, either by **Client Name** or by **Client ID**, and with the rest of the standard report options described above. For a detailed explanation of contact tracking and an example of the contact log report and description of its use, please refer to the **Contacts** section of the manual, below.

Follow-Ups Due



The **Follow-Ups Due** Report is an important tool for keeping your agency on top of timely submittal of the various reporting period forms - it should be run at least once a month (see the **What Lodestar Reports to Generate, When** section of the manual below for details on how and when to run this and other reports). Though the name suggests a report of strictly Follow Up forms that are due, this screen is also used to generate a list of Intakes and Pregnancy Outcomes, as well as a variety of other types of case management notification that may be due relative to the dates you specify. The report is printed with a separate page or pages for each case manager, covers a range of dates as specified by you and allows you to include (via the checkboxes available on the screen) a variety of different kinds of ticklers (Intakes, Pregnancy Outcomes, Follow Ups, CL-9s, etc.) about which you want due date information. Make your choices in the **Follow-Ups Due** screen concerning: **Report Dates** (Default dates cover three months, beginning two months prior to the reporting date and ending one month after the reporting date to show both what has been missed and what will be due soon.) **Pay Source** and **Case Managers** (select just as for **Client Roster**, above), and the kinds of ticklers you want the report to **Include** (click on any or all the available notification types listed). There are also two special checkboxes: **List All Under Current CM Only** allows you to list clients under their current Case Manager, rather than the Client's Case Manager when the Follow-Up was originally due. (Please note that the client's funding source at the time the specific Follow-Up was due will show, whether or not it is their current funding source.) **For Currently Active Clients Only** allows you to exclude from the selected reports all clients who are now inactive, regardless of the dates specified (e.g., you may reprint a report from some time in the past without including information on clients who have since left the program). When you have finished making your selections, **Preview** or **Print** (or **Close**) as explained above.

(New) Three items have been added to the **Follow-Ups Due** which will always be included no matter which other choices you make. Those AFLP clients who have been in the program 18 months and whose child is 18 months or older will have **18 and 18 Rule** show up with the date they are due to be terminated if it is within the date range or prior to the date range. Another Follow-Up that will always show is **Client 19 on _/_(**month and day). This will also show up if it is within or before the date range. If, however, a waiver has been granted, neither of those will show up until the Waiver End Date is past. The **Waiver End Date** will show up if it is within the date range chosen.



Follow-Ups / Reviews Due

FUNDING SOURCE: All Agency ClientsClients - List Under Current CM Only
REPORTING PERIOD: 07/29/2010 to 10/27/2010
TYPES INCLUDED: Intake - Preganacy Outcome - Follow-Up
SORT ORDER: Case Mgr / Client Name

Case Manager: A102 Alysia Manager

Client ID	Name	Status	Child Birth Date	Child Name	Due	Date Due	Phone	Comments
464646464	Becibeth Becibethson	AFLP Active 08/29/2010	/ /		Intake Due	09/28/2010	333-444-3456	
373737373	BeckyBeckyson	AFLP Active 06/10/2010	07/31/2010		Preg. Outcome Due	07/31/2010	333-444-2345	
	BeckyBeckyson	AFLP Active 06/10/2010			Client 19 on 9/20	09/20/2010	333-444-2345	
113113113	Lora Lorason	AFLP Active 03/26/2008	03/01/2007		18 and 18 rule	10/21/2008		

If you use the CL-8s and Rpt Cards selections in Follow-Ups Due, you may see both **CL-8 due** and **Last RCard: Do CL-8** on a few clients. This will happen if a client has exited and returned to Cal Learn within a few weeks. Their last report card may have been due shortly before they exited and the **Last RCard: Do CL-8** is a reminder to do another set of report cards. Any time someone becomes Active in Cal Learn Lodestar automatically reminds the Case Manager to do a set of report cards.

Length of Enrollment

The **Length of Enrollment** report calculates and reports on the number of days each chosen client has been active as of a certain date. The report includes other information about the chosen clients and their children similar to the Client Roster.

School Roster

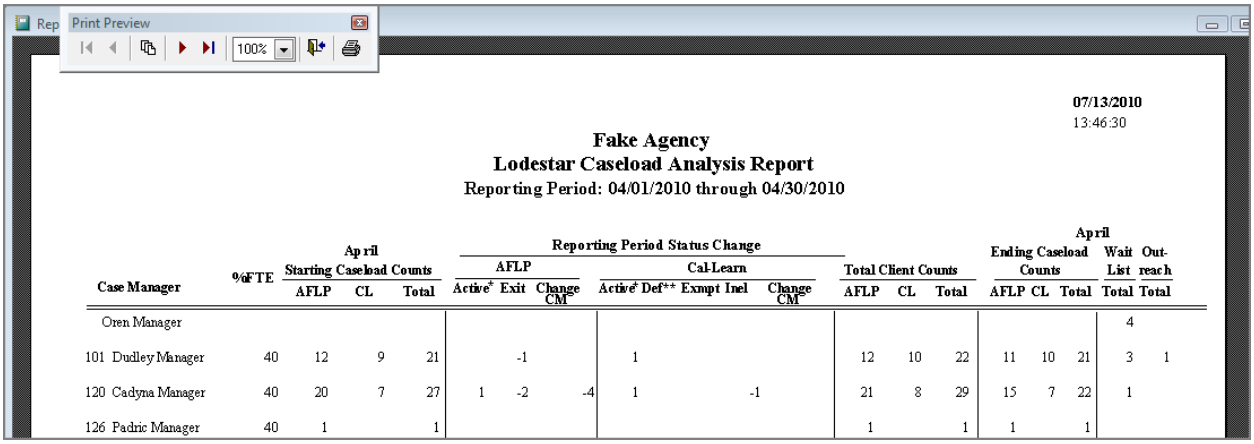
This report allows you to generate a roster of clients who are active or deferred as of the specified date and the school that they are attending or at which they are enrolled. Options for this report include the same **Report Dates**, **Case Manager** and **Pay Source** selections as described for the Client Roster. Also included is a **Schools** option which allows you to select, based on School Code values, **All** schools, a **From: - To:** range of schools, or a specific school, just like the **Case Manager** option above, and a **Report Output** option which allows you to specify whether you want a detail **Listing by School** (and within that by client name) followed by a summary report, a detail **Listing by Case Manager** (and within that by school, then client name) followed by a summary report, or the **Summary Report** alone, which reports totals for the report values specified.

Management Summary

Caseload Analysis

The **Caseload Analysis** report provides an analysis by case manager of caseload activity for a user-selected period of time. Included for AFLP and Cal-Learn programs is a count of new and exited clients during the period and those who changed case managers, and a count of beginning and ending caseloads. In addition, for Cal-Learn, there is a count of the number of clients who became deferred or exempt during the period. For AFLP, the last two columns on the right show any Wait-Listed or Outreach clients a case manager had during the time chosen. A separate summary page lists total counts for all case managers, a count of AFLP and Sibling Wait-Listed clients, and a count of Cal-Learn Deferred-No Case Management clients. The report can be done for all Case Managers, a single Case Manager or a chosen range of Case Managers.

The **Caseload Analysis** screen allows you to enter a range of dates for the report. You will usually want to enter monthly or quarterly values. An example of the **Caseload Analysis** report is shown below:



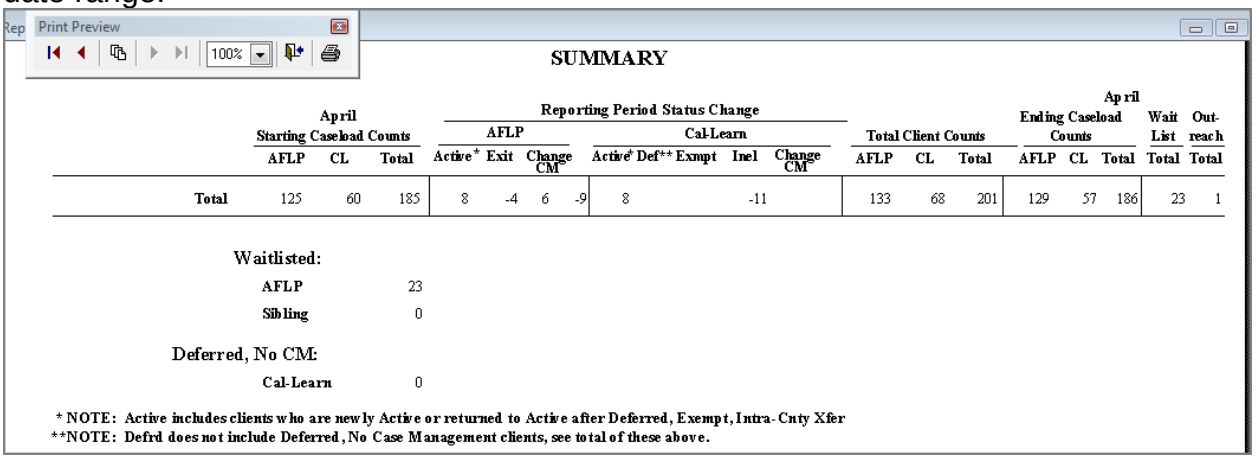
07/13/2010
13:46:30

Fake Agency
Lodestar Caseload Analysis Report
Reporting Period: 04/01/2010 through 04/30/2010

Case Manager	%FTE	April Starting Caseload Counts			Reporting Period Status Change								Total Client Counts			April Ending Caseload Counts			Wait List	Out-reach
					AFLP			Cal-Learn												
		AFLP	CL	Total	Active*	Exit	Change CM	Active*	Def**	Exmpt	Inel	Change CM	AFLP	CL	Total	AFLP	CL	Total	Total	Total
Oren Manager																			4	
101 Dudley Manager	40	12	9	21		-1		1					12	10	22	11	10	21	3	1
120 Cadyna Manager	40	20	7	27	1	-2	-4	1			-1		21	8	29	15	7	22	1	
126 Padric Manager	40	1		1									1		1	1		1		

Starting Caseload Counts and **Ending Caseload Counts** show the number of Active clients each case manager had for AFLP and Cal Learn as well as the total clients at the beginning and end of the date range, respectively. Listed under the **Reporting Period Status Change** are counts for each case manager of each of the possible types of status changes which occurred within the specified date range for AFLP and Cal Learn. The next section shows **Total Client Counts** in each of the funding sources for each case manager. The last section lists total number of Wait List or Outreach clients for each case manager.

The **Summary** page at the end of the report gives totals in each area for the whole agency for the date range.



SUMMARY

	April Starting Caseload Counts			Reporting Period Status Change									Total Client Counts			April Ending Caseload Counts			Wait List	Out-reach
				AFLP				Cal-Learn												
	AFLP	CL	Total	Active*	Exit	Change CM		Active*	Def**	Exmpt	Inel	Change CM	AFLP	CL	Total	AFLP	CL	Total	Total	Total
Total	125	60	185	8	-4	6	-9	8			-11		133	68	201	129	57	186	23	1

Waitlisted:
AFLP 23
Sibling 0

Deferred, No CM:
Cal-Learn 0

* NOTE: Active includes clients who are newly Active or returned to Active after Deferred, Exempt, Intra-Cnty Xfer
**NOTE: Defrd does not include Deferred, No Case Management clients, see total of these above.

The report may be previewed or printed by clicking the appropriate pushbutton. These features work the same as on the **Client Roster** report described in detail above.

Other Caseload Analysis

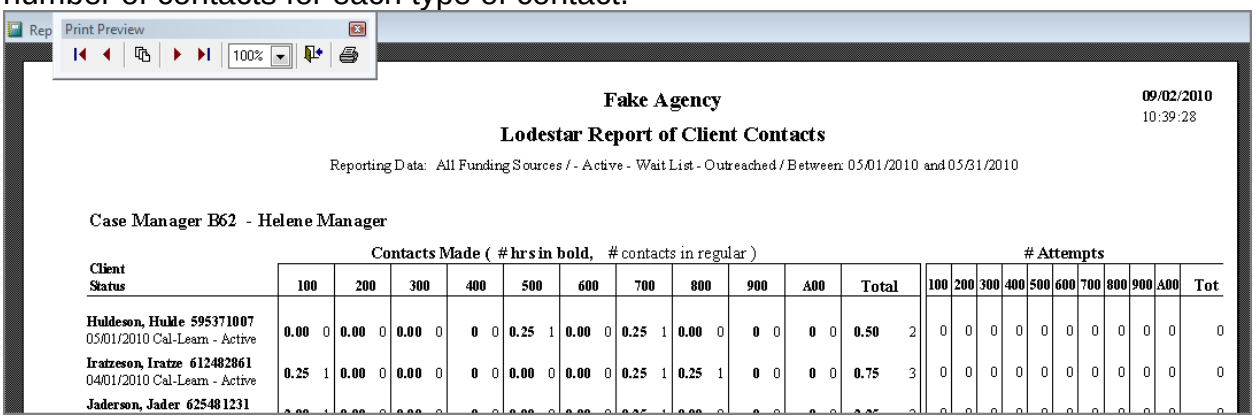
The **Other Caseload Analysis** report gives much of the same information as above for clients entered in Lodestar who are served through other funding sources

Child Immunization

The **Child Immunization** report is a summary report of all children grouped by age shown on forms collected during a certain date range and whether they are current on their immunizations.

Client Contact Summary

The Client Contact Summary prints a list by case manager of all contacts made by that case manager with her or his clients within the specified date range, showing total time spent and total number of contacts for each type of contact.



It is essentially a report of the totals entered into the system from Contact Log reports (see ***Contact Log*** above). A separate summary page lists agency-wide totals for Contact Hours, number of Contacts Made and number of Contacts Attempted for each type of contact and for all types totaled. Enter the date range, the case managers whose contacts you want to include in the report (all, some, or any specific one), and, if desired, check the box to print the **Summary Only**, and then **Preview** or **Print** (or **Close**) as desired. For an example of the Client Contact Summary as well as an overview of the Contact Tracking process, see the **Contacts** section of the manual, below.

Comparison Report

The **Comparison Report** allows you to examine a chosen data item over time, beginning with the Intake value and at 3 or 6-month intervals thereafter. Note that the intervals are based on actual length of enrollment for each client, and not to the reporting period intervals (e.g. the 6-month interval is not necessarily related to 6-month Follow Up).

Months of Service

The **Months of Service** report calculates months of service (MOS) by case manager for a user-designated period. It also calculates fiscal year-to-date MOS (from 7/1 to the end of the user-

designated period) and projected “fiscal” (annual) MOS based on fiscal YTD MOS. AFLP Outreach MOS are now included. AFLP contract compliance information is also provided.

16:31:16

Fake Agency
Lodestar Months of Service Report
Reporting Period: August 2006 through September 2006

Note: Fiscal YTD values and Projected MOS values are calculated from the month of July preceding the end date of this report.

Case Manager	%FTE	Reporting Period MOS				Fiscal YTD MOS				Projected Fiscal MOS			
		AFLP	C-LRN	SIB	Total	AFLP	C-LRN	SIB	Total	AFLP	C-LRN	SIB	Total
SNS Kerri Manager		1	55		56	2	84		86	8	336		344
TMS ScottyManager		38	22		60	57	34		91	228	136		364
VSM Orlan Manager		42	8		50	64	12		76	256	48		304
VYG Mel Manager		40	10		50	60	15		75	240	60		300
ZCG Asa Manager		27	33		60	42	50		92	168	200		368
	Total	750	848		1598	1143	1284		2427	4572	5136		9708
	% Caseload	46%	53%		100%	47%	52%		100%	47%	52%		100%

AFLP Months of Service Contract Compliance

	This Period	Fiscal YTD	Projected FY
Expected	868	1302	5208
Actual	750	1143	4572
Variance	(118.00)	(159.00)	(636.00)
% Variance	(13.5%)	(12.2%)	(12.2%)

Sibling Months of Service Contract Compliance

	This Period	Fiscal YTD	Projected FY
Expected	280	420	1680
Actual			
Variance	(280.00)	(420.00)	(1680.0)
% Variance	(100.0%)	(100.0%)	(100.0%)

In explanation of the report: The first group of columns shows total MOS by case manager and program during the user-designated report period, with totals at the bottom including percentages of total agency caseload by program. The second group shows the same information but for the fiscal year-to-date (YTD) period. This is calculated from the July 1 preceding the end date of the report to the end date of the report. The third group of columns takes the fiscal YTD figures and projects what the annual MOS would be based on the accumulated fiscal YTD so far. A month of service is counted for each month in which a client had any case management, including the month of program entrance and/or exit. Outreach MOS are calculated for up to two months of outreach service before a client is first active.

Although the Sibling program has been terminated, Lodestar keeps the information for historical purposes. The AFLP contract compliance information is important for those providers serving AFLP. To generate it, providers need to enter their contracted annual months of service from the Scope of Work section of their MCH contracts into the **This Site** screen found in the Lodestar **Setup** module, and must be sure to update it if the contract changes. The variance line on the report indicates whether the agency is over or under its contracted MOS requirement. Numbers in parentheses are negative numbers. In the example above the agency is a projected 636 months below its AFLP requirement for the year. (Ignore the information shown for the Sibling program.)

To run this report, click on **Months of Service** from the **Reports** module. The report can be done for all Case Managers, a single Case Manager or a range of Case Managers. Enter the dates you want in the window, and choose **Preview** or **Print** as you wish. Selecting **Print** directly prints the report after giving you the usual print options dialog box.

Other Months of Service

The **Other Months of Service** report gives the same information as above for clients in Lodestar who are served under other funding sources.

Stat 45

The Stat 45 report contains data that county welfare departments must submit to the State Department of Social Services each month. Lodestar generates both the Stat 45 report, which is a summary report, and, optionally, a detail listing that provides client-by-client back up for the report.

The Stat 45 report shows the number of clients brought forward from the previous month, the number assigned a Cal-Learn status for the user-selected report month, the total number with a Cal-Learn status for the month, the number of teens who became exempted during the month, the number who became discontinued during the month, and the number carried forward to the next month. In addition, it summarizes reasons for exemption, deferral and discontinuance. Providers who are not CWDs are likely to have to supply this information to the CWD monthly.

The detail listing lists the clients in each category in the Stat 45 report. As is the case with the Monthly Billing Report, the results of this report can be exported to Excel and other common data formats, and the detail listing can be sorted in several ways. The report screen enables making these choices.

For more information about when to generate this report, see the section in the User's Manual entitled **What Lodestar Reports to Generate, When**.

Unduplicated Client Count

The **Unduplicated Client Count** is just that - a report of numbers of clients who have received case management in each of the listed programs as well as a total of all clients seen, all within the specified date range. Clients are only counted once in each category in which they have been served, regardless of any exit and subsequent re-entry into that program. Nevertheless, the total number of clients served

05/25/98

Your Agency Name

Unduplicated Clients Served by Program

Report Period: 01/10/98 Through 05/01/98

AFLP:	4
Cal-Learn:	3
Sibling:	1
Other 1:	0
Other 2:	0
*Total clients served:	7

* Total clients served is not necessarily the sum of clients served by program, as clients who were served in more than one program are counted in each program but only counted once in Total clients served.

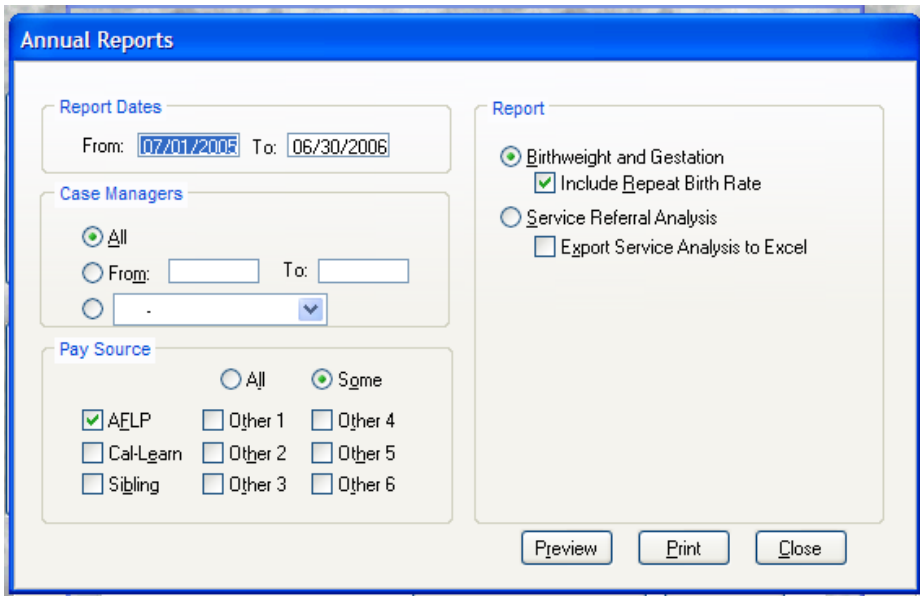
might not equal the sum of the totals for all funding sources. This is because of transfers and other situations in which a client may have been served by more than one funding source in the specified period. For example, in the above report, an AFLP client who exited the program on 2/28/98, later came back as a Cal-Learn client on 4/1/98 only to be found ineligible and thus transferred back into AFLP on 4/30/98 would be in both the counts for AFLP and Cal-Learn (only once, in each case) but would be counted only once in the final value for Total clients served. This is why the Total count is one less than the sum of totals for all funding sources.

MCAH Key

These reports are particularly helpful for AFLP agency reports to MCAH but can be useful for other programs which have clients entered into Lodestar.

Annual

There are two types of report available via the ***Annual*** button. You can choose to create these reports for your whole program or for only certain funding sources or case managers.



The **Birthweight and Gestation** report compares the incidence of low and very low birthweight babies born in your program during the time frame to the statewide average for AFLP clients and all California births. It also includes a comparison of babies born in your program, all AFLP clients and all California births at less than 37 weeks gestation and less that 32 weeks gestation. You can choose to include the number of repeat births to your clients who have been active in the program at least one year.

The second report available in ***Annual*** is an aggregate **Service Referrals Analysis** from the Service Matrix forms for all clients in your program during the chosen time frame. The figures are given in numbers of referrals in the first report and the percentages in the second report. This report can also be exported to Excel. Below are portions of the two Service Referral Analysis reports.

Service Referral Analysis

11/13/2006
16:58:06

Report Data: All Agency Clients - Between 07/01/2005 and 06/30/2006

Total: 367 clients served that had at least one follow-up visit.
Sorted by need

				*Of those who needed the service:				**Of those who were referred but did not recieve service, reason for non-receipt:				#Of those who needed service but were not referred, reason given for no referral:		
Service	Needed service*	Did not need service	Need unknown	Were receiving service at AFLP intake	Referred through AFLP / received service	Referred through AFLP / did not receive service**	Not referred #	Service not access-ible	Did not follow through	Client refused service	No reason given (client hasn't gone yet)	Service not avail-able	Client not eligible for service	Not yet referred
WIC - Child	367			222	144	1				1				
Medi-Cal - Child	364	3		162	197	4	1				4			1
Medi-Cal	362	5		268	82	8	4			1	7		1	3
Education	357	10		212	82	47	16		5	2	40			16
Family Planning	327	40		69	183	63	12		3	20	40		3	9
WIC	318	49		262	52		4						4	
Parenting Education	271	96		41	105	101	24		7	5	89			24
Transportation	271	97		44	185	34	8			1	33			8
Prim Prev Hlth	260	107		158	81	19	2				19			2
Child Day Care	241	126		47	143	41	10	2	2	2	35			10

Service Referral Analysis - Percentages

11/13/2006
16:01:24

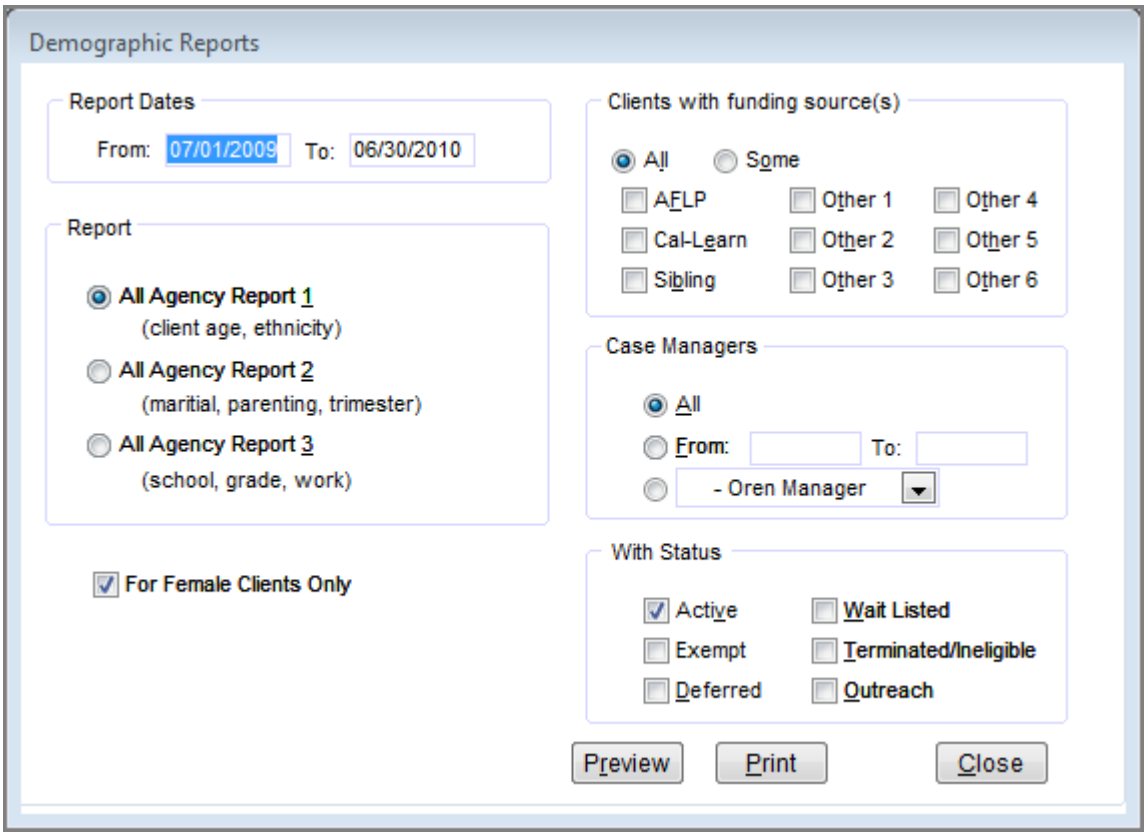
Report Data: All Agency Clients - Between 07/01/2005 and 06/30/2006

Total: 367 clients served that had at least one follow-up visit.
Sorted by need

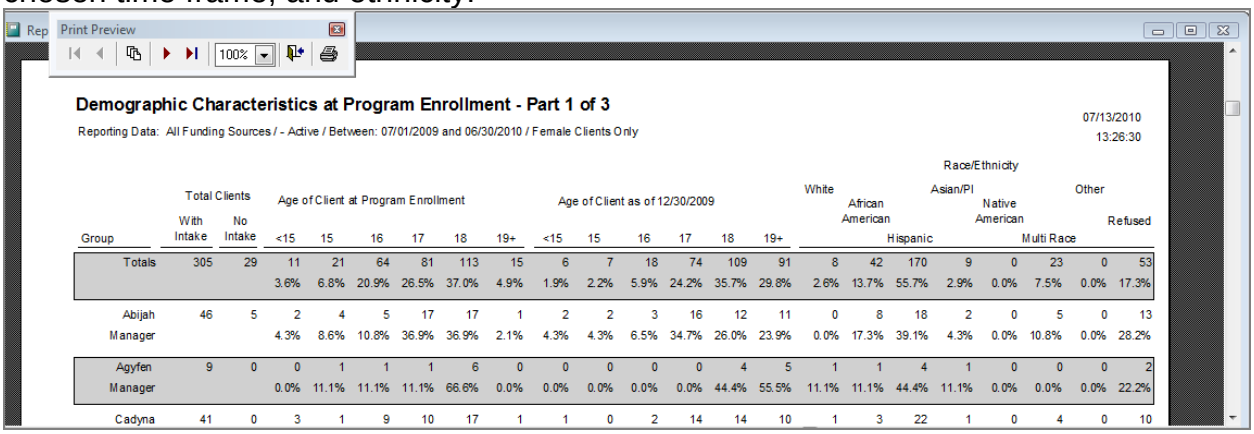
				*Of those who needed the service:				**Of those who were referred but did not recieve service, reason for non-receipt:				#Of those who needed service but were not referred, reason given for no referral:		
Service	Needed service*	Did not need service	Need unknown	Were receiving service at AFLP intake	Referred through AFLP / recieved service	Referred through AFLP / did not receive service**	Not referred #	Service not access-ible	Did not follow through	Client refused service	No reason given (client hasn't gone yet)	Service not avail-able	Client not eligible for service	Not yet referred
WIC - Child	100%		0%	60%	39%	0%	0%	0%	0%	100%	0%	0%	0%	0%
Medi-Cal - Child	99%	0%	0%	44%	54%	1%	0%	0%	0%	0%	100%	0%	0%	100%
Medi-Cal	98%	1%	0%	74%	22%	2%	1%	0%	0%	12%	87%	0%	25%	75%
Education	97%	2%	0%	59%	22%	13%	4%	0%	10%	4%	85%	0%	0%	100%
Family Planning	89%	10%	0%	21%	55%	19%	3%	0%	4%	31%	63%	0%	25%	75%
WIC	86%	13%	0%	82%	16%	0%	1%	0%	0%	0%	0%	0%	100%	0%
Parenting Education	73%	26%	0%	15%	38%	37%	8%	0%	6%	4%	88%	0%	0%	100%
Transportation	73%	26%	0%	16%	68%	12%	2%	0%	0%	2%	97%	0%	0%	100%
Prim Prev Hlth	70%	29%	0%	60%	31%	7%	0%	0%	0%	0%	100%	0%	0%	100%
Child Day Care	65%	34%	0%	19%	58%	17%	4%	4%	4%	4%	85%	0%	0%	100%

Demographic Reports New

The **Demographic Reports** screen provides a choice of three reports which each contain a large amount of information on clients at enrollment, inluding ages, ethnicity, school enrollment, marital status and pregnancy entry status. You can choose the date range, funding source(s), all, some or one case manager(s), which client status(es) you want to include and whether you want the report to only reflect female clients or not. These reports will also show you at a glance how many of your clients do not yet have intakes. The information is shown by agency totals and by case manager. The default date range is the most recent fiscal year.



Part 1 of the demographic reports focuses on client age at enrollment, age mid way through the chosen time frame, and ethnicity.



Print Preview

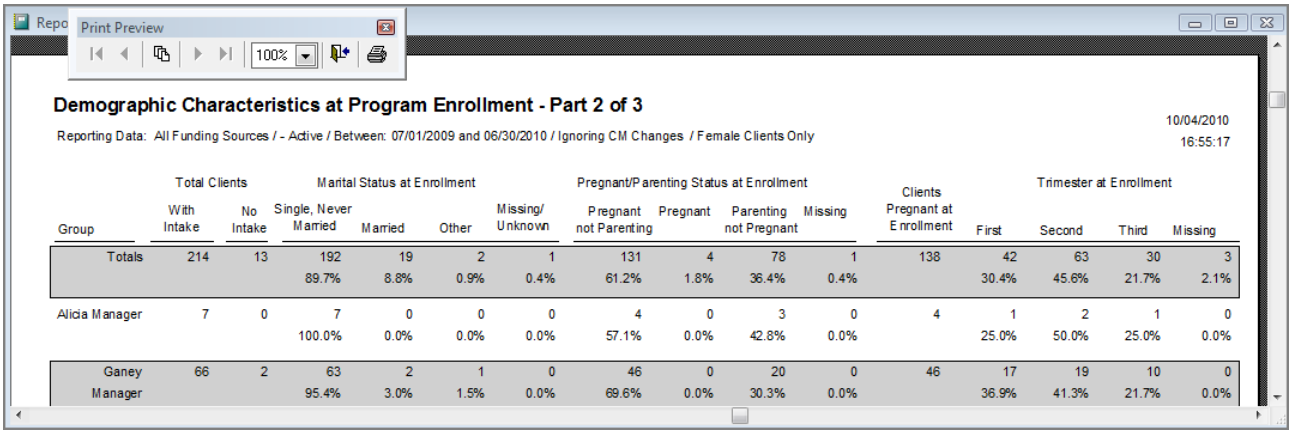
Demographic Characteristics at Program Enrollment - Part 1 of 3

Reporting Data: All Funding Sources / - Active / Between: 07/01/2009 and 06/30/2010 / Female Clients Only

07/13/2010
13:26:30

Group	Total Clients: With Intake	Total Clients: No Intake	Age of Client at Program Enrollment: <15	15	16	17	18	19+	Age of Client as of 12/30/2009: <15	15	16	17	18	19+	Race/Ethnicity: White	African American	Hispanic	Asian/PI	Native American	Multi Race	Other	Refused
Totals	305	29	11	21	64	81	113	15	6	7	18	74	109	91	8	42	170	9	0	23	0	53
			3.6%	6.8%	20.9%	26.5%	37.0%	4.9%	1.9%	2.2%	5.9%	24.2%	35.7%	29.8%	2.6%	13.7%	55.7%	2.9%	0.0%	7.5%	0.0%	17.3%
Abijah Manager	46	5	2	4	5	17	17	1	2	2	3	16	12	11	0	8	18	2	0	5	0	13
			4.3%	8.6%	10.8%	36.9%	36.9%	2.1%	4.3%	4.3%	6.5%	34.7%	26.0%	23.9%	0.0%	17.3%	39.1%	4.3%	0.0%	10.8%	0.0%	28.2%
Agyfen Manager	9	0	0	1	1	1	6	0	0	0	0	0	4	5	1	1	4	1	0	0	0	2
			0.0%	11.1%	11.1%	11.1%	66.6%	0.0%	0.0%	0.0%	0.0%	0.0%	44.4%	55.5%	11.1%	11.1%	44.4%	11.1%	0.0%	0.0%	0.0%	22.2%
Cadyna	41	0	3	1	9	10	17	1	1	0	2	14	14	10	1	3	22	1	0	4	0	10

Part 2 focuses on the client's marital status and pregnant/ parenting status at enrollment as well as trimester at enrollment for those who were pregnant.



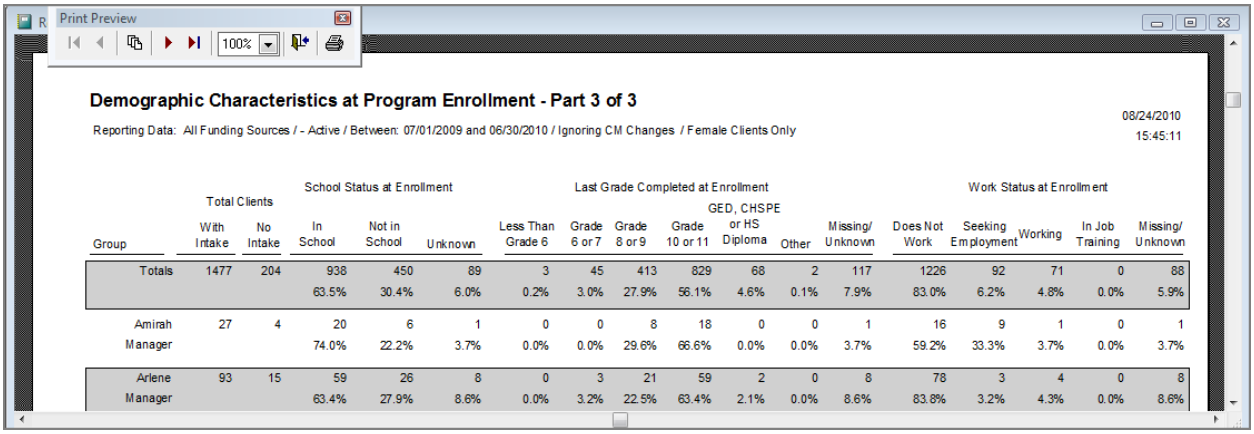
Demographic Characteristics at Program Enrollment - Part 2 of 3

Reporting Data: All Funding Sources / - Active / Between: 07/01/2009 and 06/30/2010 / Ignoring CM Changes / Female Clients Only

10/04/2010
16:55:17

Group	Total Clients: With Intake	Total Clients: No Intake	Marital Status at Enrollment: Single, Never Married	Marital Status at Enrollment: Married	Marital Status at Enrollment: Other	Marital Status at Enrollment: Missing/ Unknown	Pregnant/Parenting Status at Enrollment: Pregnant not Parenting	Pregnant/Parenting Status at Enrollment: Pregnant	Pregnant/Parenting Status at Enrollment: Parenting not Pregnant	Pregnant/Parenting Status at Enrollment: Missing	Clients Pregnant at Enrollment	Trimester at Enrollment: First	Trimester at Enrollment: Second	Trimester at Enrollment: Third	Trimester at Enrollment: Missing
Totals	214	13	192	19	2	1	131	4	78	1	138	42	63	30	3
			89.7%	8.8%	0.9%	0.4%	61.2%	1.8%	36.4%	0.4%		30.4%	45.6%	21.7%	2.1%
Alicia Manager	7	0	7	0	0	0	4	0	3	0	4	1	2	1	0
			100.0%	0.0%	0.0%	0.0%	57.1%	0.0%	42.8%	0.0%		25.0%	50.0%	25.0%	0.0%
Ganey Manager	66	2	63	2	1	0	46	0	20	0	46	17	19	10	0
			95.4%	3.0%	1.5%	0.0%	69.6%	0.0%	30.3%	0.0%		36.9%	41.3%	21.7%	0.0%

Part 3 of the demographic reports focuses on school status, last grade completed and work status, all at enrollment.



Demographic Characteristics at Program Enrollment - Part 3 of 3

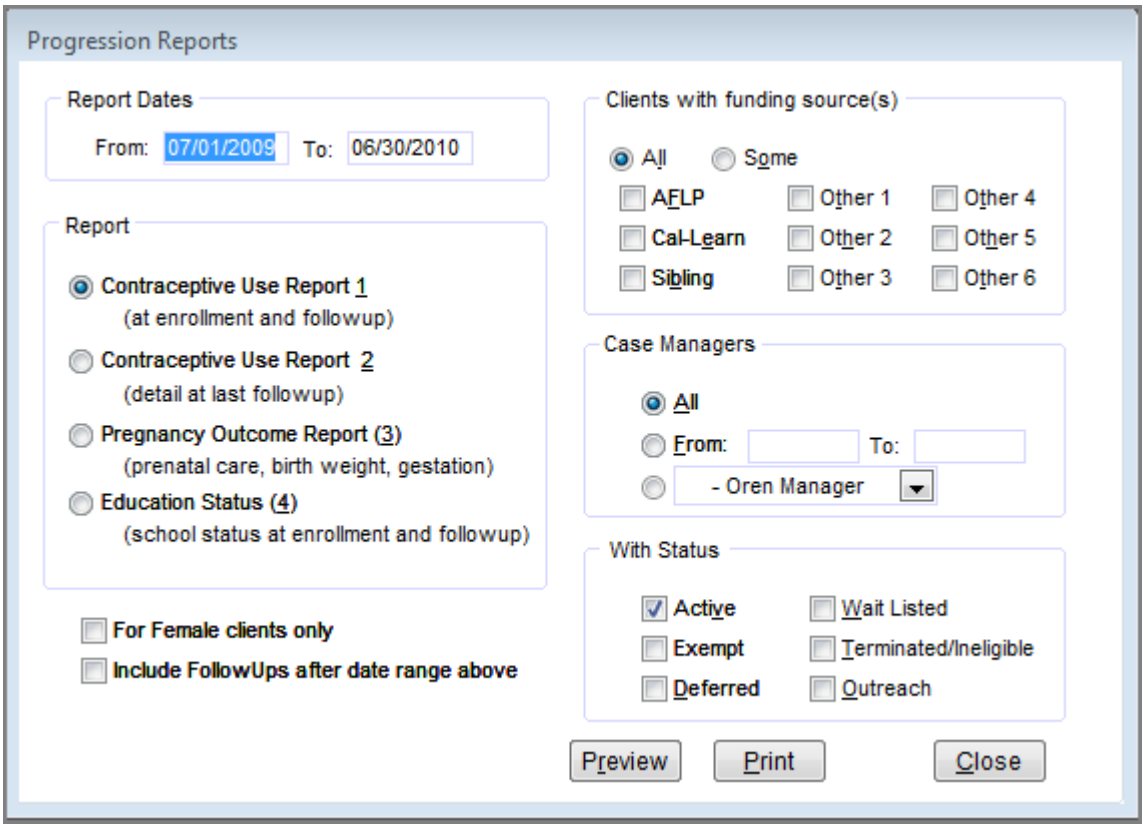
Reporting Data: All Funding Sources / - Active / Between: 07/01/2009 and 06/30/2010 / Ignoring CM Changes / Female Clients Only

08/24/2010
15:45:11

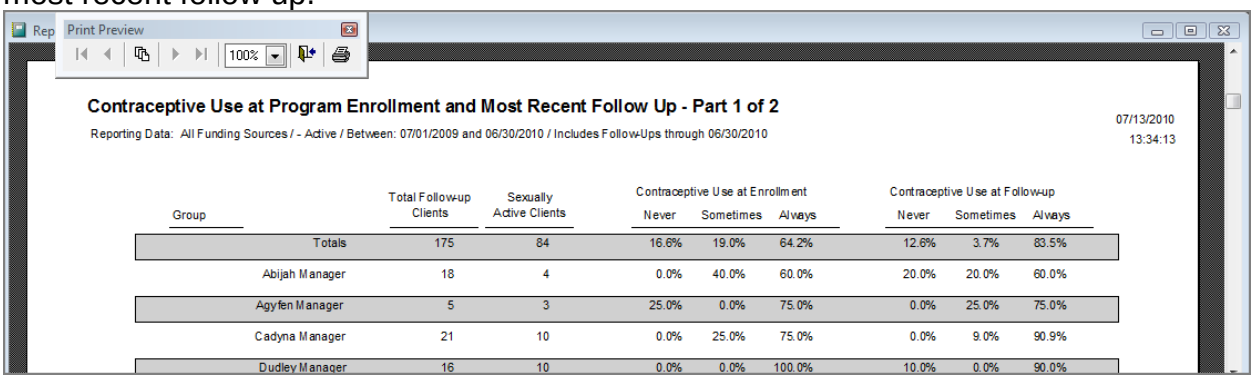
Group	Total Clients: With Intake	Total Clients: No Intake	School Status at Enrollment: In School	School Status at Enrollment: Not in School	School Status at Enrollment: Unknown	Last Grade Completed at Enrollment: Less Than Grade 6	Last Grade Completed at Enrollment: Grade 6 or 7	Last Grade Completed at Enrollment: Grade 8 or 9	Last Grade Completed at Enrollment: Grade 10 or 11	Last Grade Completed at Enrollment: GED, CHSPE or HS Diploma	Last Grade Completed at Enrollment: Other	Last Grade Completed at Enrollment: Missing/ Unknown	Work Status at Enrollment: Does Not Work	Work Status at Enrollment: Seeking Employment	Work Status at Enrollment: Working	Work Status at Enrollment: In Job Training	Work Status at Enrollment: Missing/ Unknown
Totals	1477	204	938	450	89	3	45	413	829	68	2	117	1226	92	71	0	88
			63.5%	30.4%	6.0%	0.2%	3.0%	27.9%	56.1%	4.6%	0.1%	7.9%	83.0%	6.2%	4.8%	0.0%	5.9%
Amirah Manager	27	4	20	6	1	0	0	8	18	0	0	1	16	9	1	0	1
			74.0%	22.2%	3.7%	0.0%	0.0%	29.6%	66.6%	0.0%	0.0%	3.7%	59.2%	33.3%	3.7%	0.0%	3.7%
Arlene Manager	93	15	59	26	8	0	3	21	59	2	0	8	78	3	4	0	8
			63.4%	27.9%	8.6%	0.0%	3.2%	22.5%	63.4%	2.1%	0.0%	8.6%	83.8%	3.2%	4.3%	0.0%	8.6%

Progression Reports New

The **Progression Reports** screen provides two reports on client contraceptive use, a report on pregnancy outcomes and a report comparing school status at enrollment and followup. You can choose report dates, case managers, client status and funding source and whether the report will be only for female clients. Default report dates are the most recent fiscal year.



The first part of the **Contraceptive Use Report** compares contraceptive use at enrollment and most recent follow up.



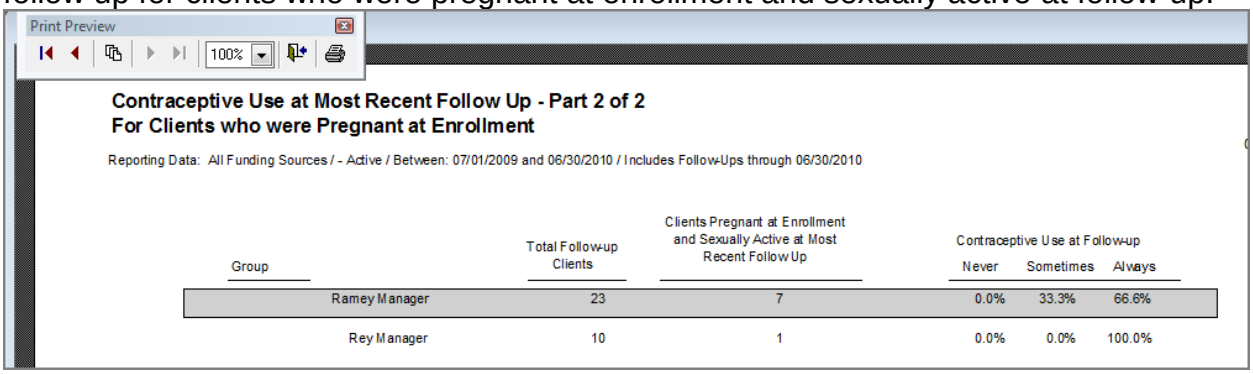
Contraceptive Use at Program Enrollment and Most Recent Follow Up - Part 1 of 2

Reporting Data: All Funding Sources / - Active / Between: 07/01/2009 and 06/30/2010 / Includes Follow-Ups through 06/30/2010

07/13/2010
13:34:13

Group	Total Follow-up Clients	Sexually Active Clients	Contraceptive Use at Enrollment			Contraceptive Use at Follow-up		
			Never	Sometimes	Always	Never	Sometimes	Always
Totals	175	84	16.6%	19.0%	64.2%	12.6%	3.7%	83.5%
Abijah Manager	18	4	0.0%	40.0%	60.0%	20.0%	20.0%	60.0%
Agyfen Manager	5	3	25.0%	0.0%	75.0%	0.0%	25.0%	75.0%
Cadyna Manager	21	10	0.0%	25.0%	75.0%	0.0%	9.0%	90.9%
Dudley Manager	16	10	0.0%	0.0%	100.0%	10.0%	0.0%	90.0%

The second part of the **Contraceptive Use Report** focuses on what the contraceptive use was at follow up for clients who were pregnant at enrollment and sexually active at follow-up.

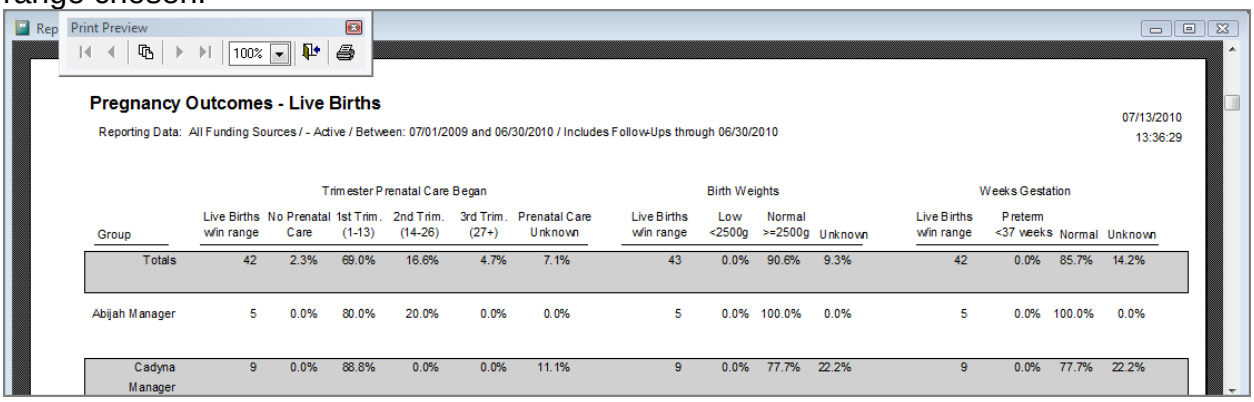


Contraceptive Use at Most Recent Follow Up - Part 2 of 2
For Clients who were Pregnant at Enrollment

Reporting Data: All Funding Sources / - Active / Between: 07/01/2009 and 06/30/2010 / Includes Follow-Ups through 06/30/2010

Group	Total Follow-up Clients	Clients Pregnant at Enrollment and Sexually Active at Most Recent Follow Up	Contraceptive Use at Follow-up		
			Never	Sometimes	Always
Ramey Manager	23	7	0.0%	33.3%	66.6%
Rey Manager	10	1	0.0%	0.0%	100.0%

The third Progression report gives agency wide information on live birth outcomes during the date range chosen.



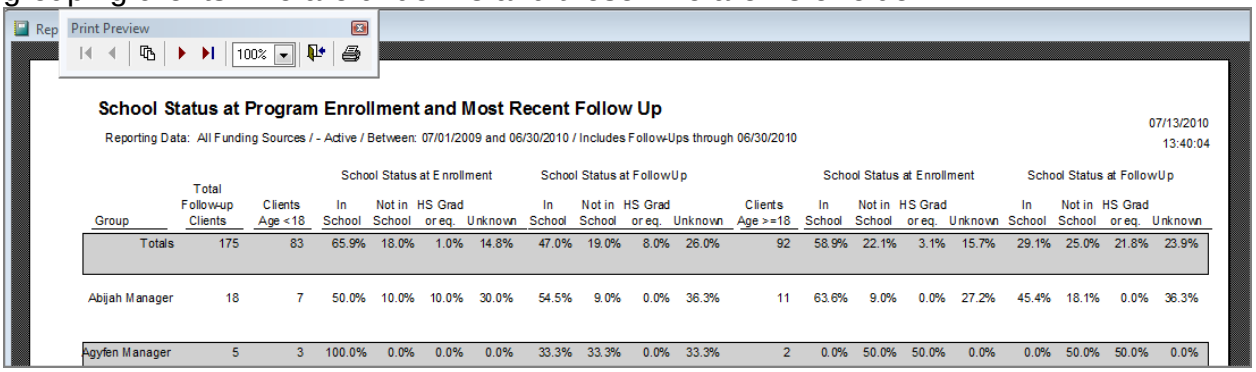
Pregnancy Outcomes - Live Births

Reporting Data: All Funding Sources / - Active / Between: 07/01/2009 and 06/30/2010 / Includes Follow-Ups through 06/30/2010

07/13/2010
13:36:29

	Trimester Prenatal Care Began						Birth Weights				Weeks Gestation			
Group	Live Births w/in range	No Prenatal Care	1st Trim. (1-13)	2nd Trim. (14-26)	3rd Trim. (27+)	Prenatal Care Unknown	Live Births w/in range	Low <2500g	Normal >=2500g	Unknown	Live Births w/in range	Preterm <37 weeks	Normal	Unknown
Totals	42	2.3%	69.0%	16.6%	4.7%	7.1%	43	0.0%	90.6%	9.3%	42	0.0%	85.7%	14.2%
Abijah Manager	5	0.0%	80.0%	20.0%	0.0%	0.0%	5	0.0%	100.0%	0.0%	5	0.0%	100.0%	0.0%
Cadyna Manager	9	0.0%	88.8%	0.0%	0.0%	11.1%	9	0.0%	77.7%	22.2%	9	0.0%	77.7%	22.2%

The fourth Progression report compares school status at enrollment and at most recent followup, grouping clients who are under 18 and those who are 18 or older.



School Status at Program Enrollment and Most Recent Follow Up

Reporting Data: All Funding Sources / - Active / Between: 07/01/2009 and 06/30/2010 / Includes Follow-Ups through 06/30/2010

07/13/2010
13:40:04

			School Status at Enrollment				School Status at FollowUp					School Status at Enrollment				School Status at FollowUp			
Group	Total Follow-up Clients	Clients Age < 18	In School	Not in School	HS Grad or eq.	Unknown	In School	Not in School	HS Grad or eq.	Unknown	Clients Age >=18	In School	Not in School	HS Grad or eq.	Unknown	In School	Not in School	HS Grad or eq.	Unknown
Totals	175	83	65.9%	18.0%	1.0%	14.8%	47.0%	19.0%	8.0%	26.0%	92	58.9%	22.1%	3.1%	15.7%	29.1%	25.0%	21.8%	23.9%
Abijah Manager	18	7	50.0%	10.0%	10.0%	30.0%	54.5%	9.0%	0.0%	36.3%	11	63.6%	9.0%	0.0%	27.2%	45.4%	18.1%	0.0%	36.3%
Agyfen Manager	5	3	100.0%	0.0%	0.0%	0.0%	33.3%	33.3%	0.0%	33.3%	2	0.0%	50.0%	50.0%	0.0%	0.0%	50.0%	50.0%	0.0%

L.A. County

These reports were designed to meet the specific needs of L.A. County agencies. If you would like to use either of the reports, please call Tech Support to make sure you understand how they work.

L.A. Case Assignment

The **L.A. Case Assignment Reports** provides certain forms when new clients are assigned to a case manager.

L.A. Performance Measures

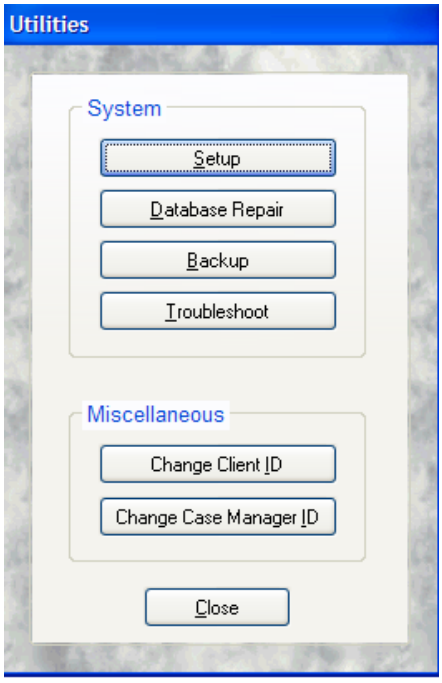
The L.A. Performance Measures Reports is a special report design to provide L.A. County Dept. of Social Services with data to track the success of the Cal-Learn programs in the agencies in that county. Among other things it provides data on numbers and percentages of clients who were

scheduled for and attended orientation, who were enrolled in school and attended, who submitted report cards due, and who graduated or aged out after completing 11th grade.

Data-Cleaning Reports

This module allows you to print reports containing information about any of four possible types of errors that may exist in your data. The reports generated here are the same ones that Lodestar will produce automatically before you create the MCH disk, allowing you to keep track of data problems at will. The default is for Lodestar to search for all four listed types of errors, but you may de-select any of them by clicking on the appropriate check box (e.g. if you only want a report of **Error Flagged Records**, click on each of the other check boxes to make the "X" disappear.) If there are no errors to be found, no reports will show when you click on **Preview** or **Print**. For help on removing any of these errors, call Lodestar Technical Support at (707) 895-2510.

Utilities



The **Utilities** section of the **Lodestar Control Panel** contains modules that enable you to perform housekeeping functions on your files and customize Lodestar for your local needs. To activate any of the modules, click on the relevant pushbutton.

System

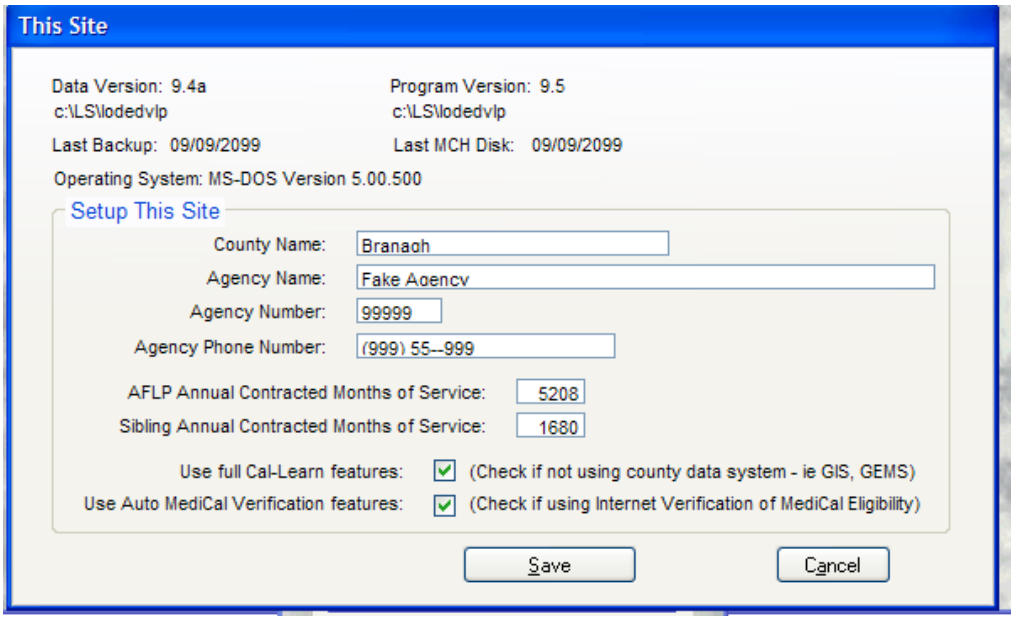
Database Repair

Database Repair is a utility that permanently removes deleted records from the files. (When you use the **Delete** button to remove a record from a data entry screen, the record actually remains in the database, although is it inaccessible to normal Lodestar usage. While it is possible under certain circumstances to recover "deleted" files in Lodestar, once a Database Repair has been run all files deleted up to that point are gone forever.) This module also diagnoses and fixes data corruption problems and re-indexes the files to maintain proper file relationships. If Lodestar is on a network at your site, you *must* make sure all other users exit Lodestar before you run a **Database Repair**.

Setup

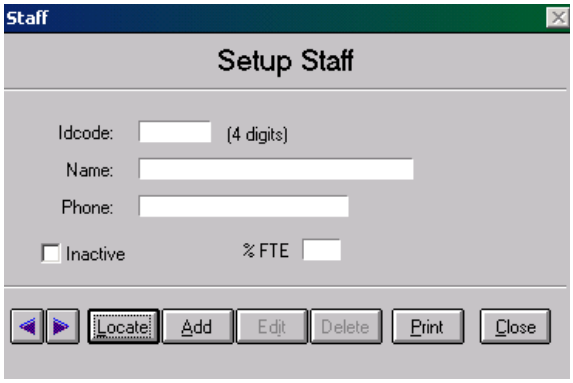
Setup contains data needed by Lodestar's data entry and reporting modules. There are setup files for **This Site** (your agency information), **Staff** (your case managers), **Schools** (which schools your clients attend), **Locations** (where you hold meetings with clients), **Lodestar Users** (this is maintained by a supervisor and contains your name, user ID, password and level of access settings)and **Funding Sources** (used to show names and style of Other Funding sources). **Setup** provides the means for you to select pre-entered values as you are doing data entry, which contributes to accurate and complete reporting. You set up and maintain these files yourself. In other words, you need to enter your staff ID codes and names, your school codes and names, and your location descriptions to control which values are allowed for these items.

To access any of the **Setup** files, click on the corresponding button.



The **Setup This Site** screen allows you to enter: The name of your county; Your agency name, number (location number) and phone number; Your AFLP and Sibling annual contracted months of service, which you must update whenever your contract changes; and whether you are using the full Cal-Learn features of the program (i.e. if you are not using a County data system such as GIS, GEMS or GEARS). This information will have been pre-entered during Lodestar installation, but you can add to or change it if you need to.

All the remaining Setup windows work in ways similar to the Setup **Staff** screen shown below, with **Locate**, **Add**, **Edit**, **Delete** and **Close** buttons lined up along the bottom. All but the **Lodestar Users** module also have a **Print** button, which will print out a short report of current information for



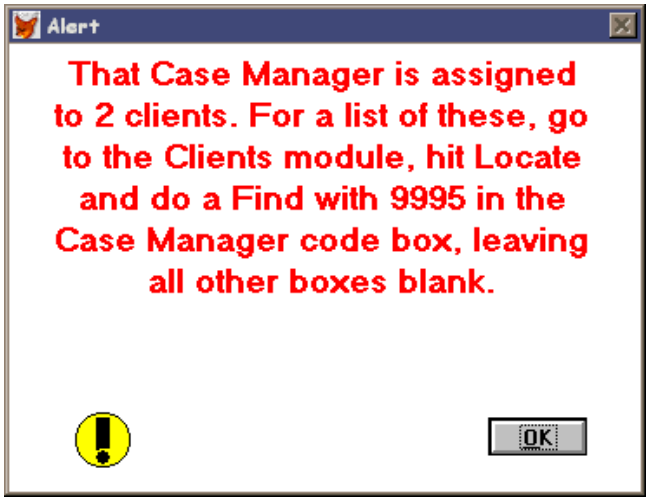
this module. Click on the button labeled with the action you want to take.

Locate pops up a scrollable list from which you may select a record to edit or delete. Double click the desired record to bring the record to the screen. (This is just like selecting a client from the **Client** screen.)

Add brings a blank data entry form to the screen. Enter data as you would on any other screen, moving from field to field using the Tab key. When you have added all data items, click on **Save** to complete the process.

To **Edit** a record, first locate it by using the **Locate** pushbutton. When the record is on the screen, click on **Edit**. For the **Schools** and **Locations** files you will be unable to change the code at the top of the selected record (School Code, and Location Code, respectively).

To **Delete** a record, first locate it by using the **Locate** pushbutton. When the record is on the screen, click on **Delete**. A message will ask you to confirm that you want to delete the record. Click on **OK** to delete the selected record. For the Staff module: If any clients have ever been assigned to a case manager you are trying to delete, Lodestar will give you a message similar to the following:



You will not be able to delete a Case Manager if they have at any time been assigned clients, even if those clients are now with other Case Managers. (The 9995 above refers to that Case Manager's code.) You can make the Case Manager inactive so they will be listed at the bottom of the pull-down lists. To make a Case Manager inactive use the **Locate** feature in the **Staff Setup** to bring up their information. Click on the **Edit** button and then click on the check box labeled 'Inactive'. Click on the **Save** button. After you have finished working with a file, click on **Close** to return to the **Setup** screen.

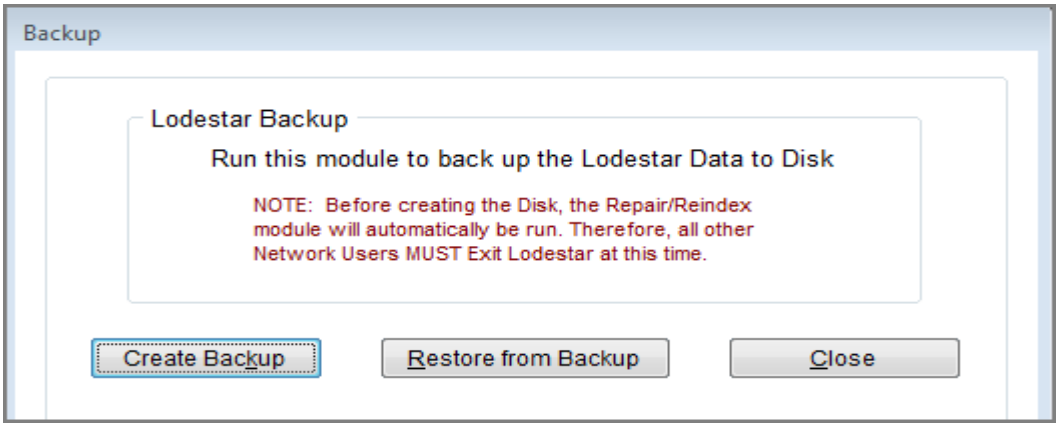
In **Setup Lodestar Users**, your administrator can choose the level of access each person has who uses Lodestar. Only a Master User level person can initiate change of information in this module. This is also the module where a person's code and password are entered.

Backup

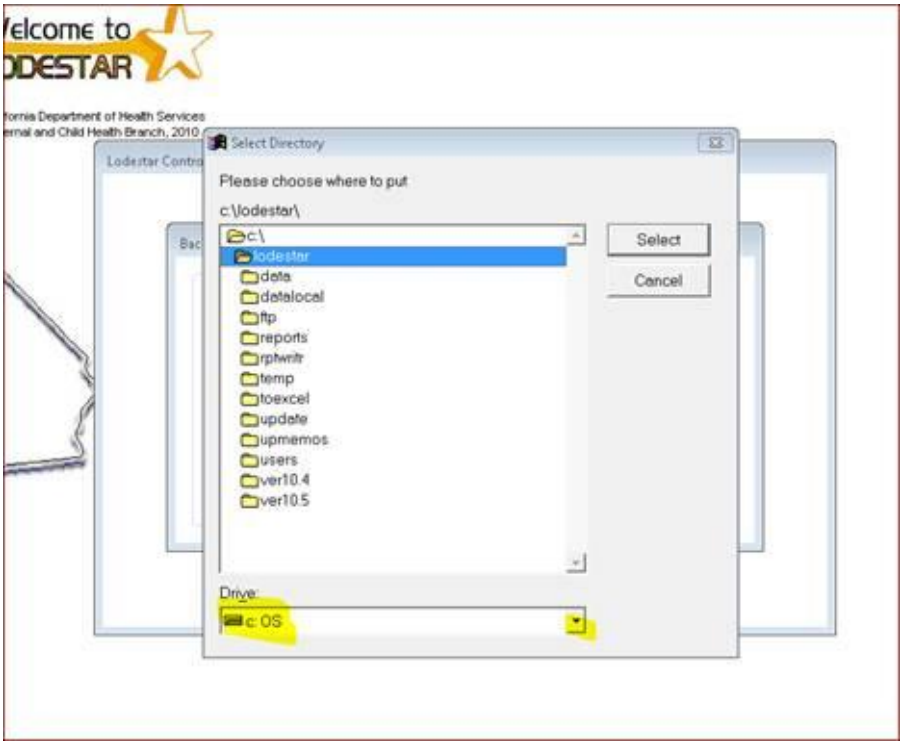
Your Lodestar data files are backed up each time you transmit to Branagh Information Group every month. It is highly recommended that you back up the data files each time you have added significant data to the files and you are welcome to transmit as many times as needed. "Significant data" means data that, if lost, would be a real headache to reconstruct. Making regular backups is a small price to pay to avoid the hassle that ensues from corrupted or lost data.

You can also back up locally to another hard drive or server by clicking the **Backup** button in **Utilities**. Upon clicking on the **Backup** button, a window will appear showing the following screen,

the three button options are **Create Backup**, **Restore from Backup** and **Close**. The files that need to be backed up have been preset. Simply click on **Create Backup** to start the backup.



A window asking you where you would like your data backed up to will appear. Select a folder on the local drive, or choose a different drive with the pull down at the bottom of the window (as shown below) and select a folder from there to back up to.



Once you click **Select** a window titled "Backup Progress" will appear apprising you of the status of the backup. The backup will proceed, and a message will appear when it is complete. A message on the bottom of the backup screen will inform you "Procedure Successful Data Copied to [the path you chose to back up to]". Click on the **Close** button to return to the main utilities screen.

If Lodestar is on a network, the backup may be done by your network administrator as a part of the regular network back up routine. You need to find out whether the network administrator knows

that Lodestar data is included in the routine. Unless your administrator is certain Lodestar data is included in the back up routine, please make regular backups by using the **Backup** feature in Lodestar or transmitting to Branagh Information Group.

If you need to restore files from back up, please contact Lodestar tech support at 707 895-2510 for assistance.

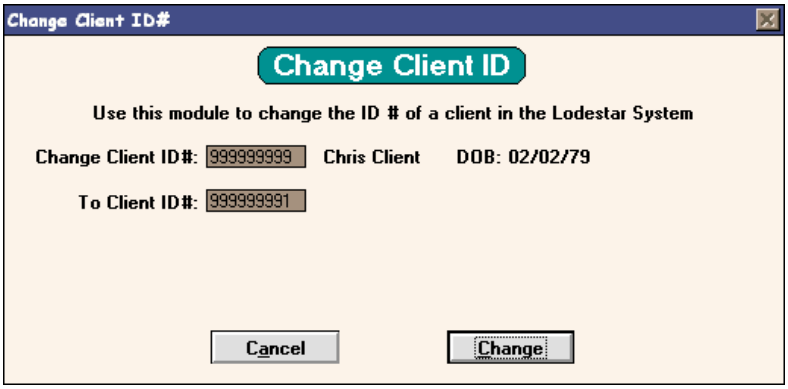
Troubleshoot

Troubleshoot is a utility that a technician may ask you to use when providing technical assistance over the phone. If you get into **Troubleshoot** on your own, it is recommended that you press ESC to get out of it; if used improperly, it could cause you to get into trouble instead of getting out of it.

Miscellaneous

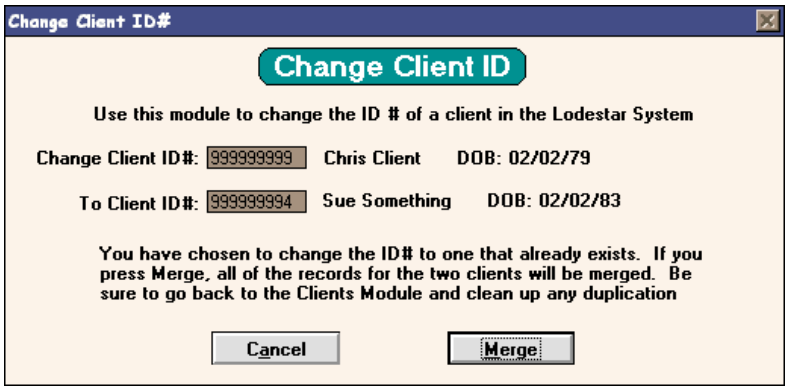
Change Client ID

Running **Change Client ID** changes a client's ID number on all reporting period, status, ID and other records throughout the Lodestar system. Use this utility if you discover that a Client ID number has been entered incorrectly, or if you discover that a client has been entered under two separate ID numbers.



After clicking on the **Change Client ID** pushbutton, enter the ID number you wish to change in the **Change Client ID#:** field. Lodestar will show you the name and DOB of the selected client. Then enter the new ID number in the **To Client ID#:** field. When you are sure you have entered the correct numbers, click on the **Change** pushbutton. If no other record currently is associated with the new Client ID#, Lodestar will give you the message, "**ID change complete. Hit any key to continue**." Hit any key and you will be returned to the Utilities screen.

However, if you attempt to change a Client ID number to one that already exists in your system, Lodestar will warn you of the existence of the new number, list the name and DOB of the client it is associated with, let you know that continuing with the change will result in a *merging* of all records for the two IDs. If you are sure that both client IDs refer to the same individual, and that you wish for all records to be merged under the number listed after "**To: Client ID #:**," then click on the **Merge** pushbutton. Otherwise, click on **Cancel**.



Change Case Manager ID

This module allows you to change the ID code for your case managers if that is ever needed. It will change the case manager's code in all information stored in Lodestar for any clients with whom that case manager was associated.

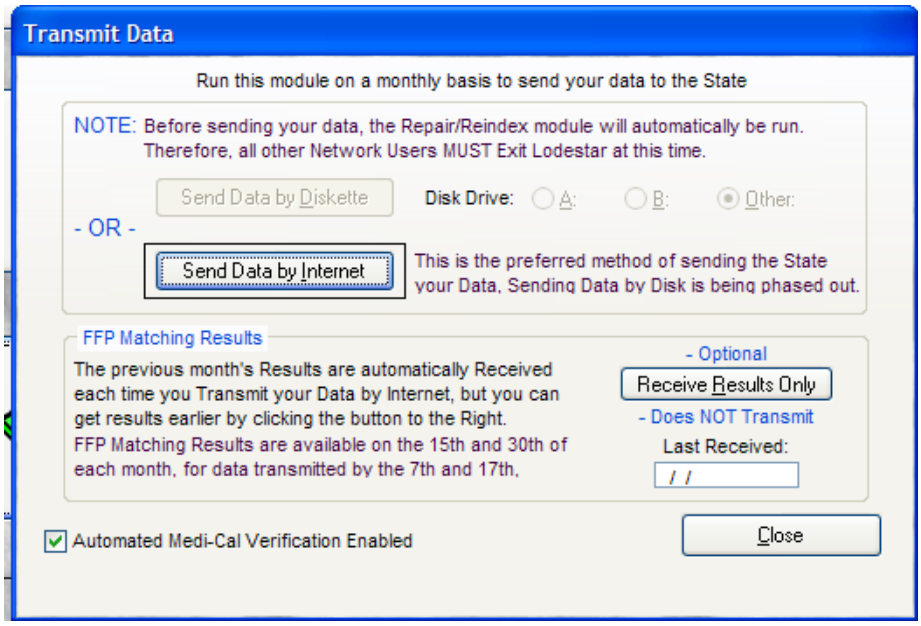
Transmit Data

You will use this module to send your data to the state each month. The preferred method is to send your data by internet. Before sending data, please run the **Data Cleaning Report** to find any data errors. You can **Locate** all error-flagged records from the **Clients** screen and attempt to clear the error flags (see section on ***Working with Error-flagged Records***). Other types of errors may require Lodestar Technical Support assistance to clear.

If you have errors in your data, you will be asked if you wish to proceed with the transmission anyway. You should correct all errors *before* you transmit your data, so unless otherwise directed by MCH or Lodestar Technical Support, press, **Cancel** then **Close** and either correct all error-flagged records as described above or contact Lodestar Technical Support at (707) 895-2510 for help in dealing with other types of data errors.

To send your data by internet

All other users must exit LodeStar before you can send data. Click on the Transmit Data Button. You will see the following screen.



Click on the **Send Data by Internet** button. Lodestar will first run through an automatic database repair. It will then proceed with the transmission and a dos box will appear. This process could take a few minutes. When it is complete a message will appear telling you the procedure was successful. A print window will then appear. The “report” it is asking you to print consists of two disk labels. One shows your agency name, (location) number and county, together with the report month and the date when the transmission was done. This is for your records only.

This module is also where the FFP matching results are received if you have chosen the automated verification method. The **Receive Results Only** button allows you to receive the verification results without actually transmitting. See the separate **Lodestar Medi-Cal Verification Processing** manual for more information.

Contacts

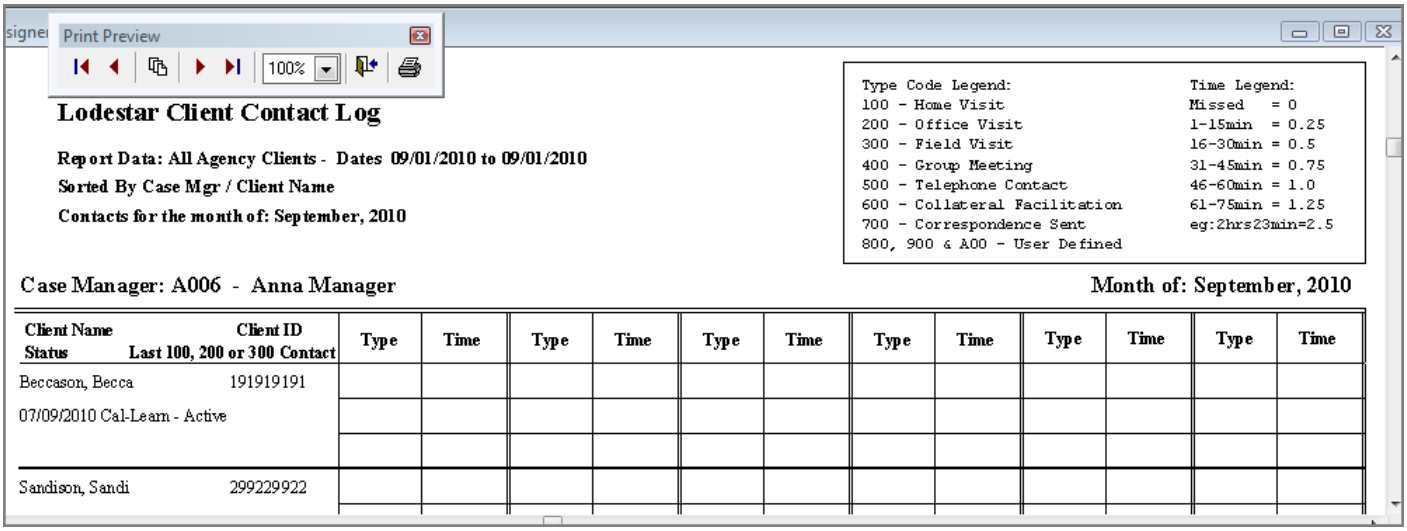
Usage Overview

Lodestar Contact Tracking allows an agency to track and summarize contacts between case managers and their clients. With the exception of research counties, its use is optional, and at the discretion of your agency. Agencies that employ it will find that it provides an excellent management tool for tracking intensity and categories of treatment received by each client.

Lodestar Contact Tracking is currently comprised of three elements. The first is the *Contact Log Report*. Its purpose is to provide a case manager with a data collection tool that shows each of their clients in the chosen status(es) with space to record up to 18 contacts per month. Once the form is completed by the case manager it is turned over for data entry in the *Contacts Module*. This module has been specially designed to facilitate the rapid entry of contact data directly from the Contact Log Report. Finally the *Client Contacts Summary Report* shows, at a glance, the total contacts provided to each client.

Contact Log Report

The Lodestar Client Contact Log is produced from the Clients list in the Reports Screen (see under ***Contact Log***, above, for details on producing the report). A sample is shown below:



Each client contact is tracked by recording the Type Code and Time Spent in the boxes provided, up to eighteen per client in the given month. Seven preset types of contacts and three user defined contacts are tracked. They are categorized as follows:

100 - Home Visit	Takes place at the client's home and includes a case manager and the client in a face to face meeting. Others may or may not be present.

200 - Office Visit	Takes place at the AFLP/Cal Learn agency office and includes a case manager and the client in a face to face meeting. Others may or may not be present.
300 - Field Visit	Takes place away from the client's home or AFLP/Cal Learn agency office and includes a case manager and the client in a face to face meeting. Others may or may not be present.
400 - Group Meeting	Takes place during a group activity conducted by the AFLP/Cal-Learn agency at which two or more clients are present. The client's case manager may or may not be involved
500 - Telephone Contact	Occurs when a case manager speaks with the CLIENT over the phone
600 - Collateral Facilitation	Consists of a face to face or telephone (not fax) contact on behalf of the client, the client's child, or the client's family with any individual who plays a significant role in that individual's health, education, or welfare.
700 - Correspondence Sent	Information that is mailed or faxed to the client that relates to the activities of the current ISP. You may count the time used to in the preparation of the materials if they are specific to this client. Do not count the time spent in preparing materials sent to multiple clients.
800, 900 & A00 – User Defined	User Defined

Note that while a Home Visit is coded as a 100, individual agencies may opt to use the second and third digits to encode additional information about the contact. For instance, you may wish to record the date of the month in which the visit took place. If it happened to be on the 15th of the month, the home visit Type would be recorded as 115. For summary reporting purposes, Lodestar will ignore the last two digits.

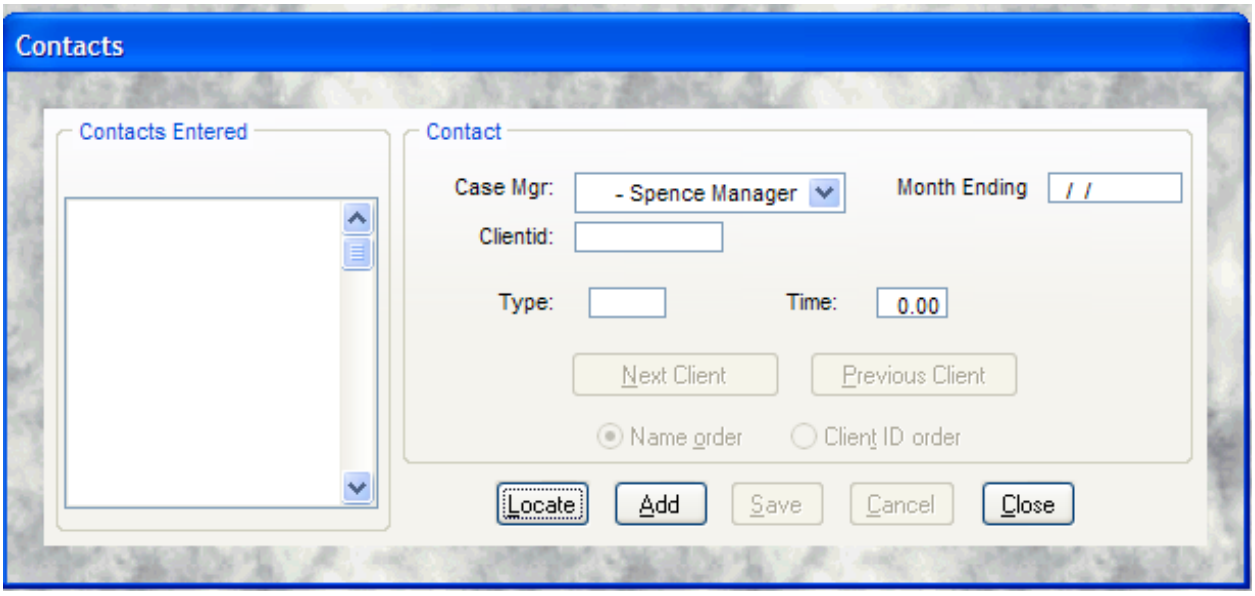
The last previous face to face contact will be documented on the ***Contact Log*** when it is printed out each month. A line will show in the same box as the client's name. It will say something like "100 in 3/2007 by AB20", meaning the last home visit was in March 2007 by Case Manager AB20. 200 or 300 could be listed instead.

To code the Time spent on a client contact, it is necessary to round **up** to the nearest quarter hour and convert to a decimal value. If a contact is attempted and missed for any reason, record the time as 0 (zero). Using this scheme, a contact that was 2 hours and 23 minutes long would be recorded as 2.5; a 10-minute contact would be recorded as 0.25.

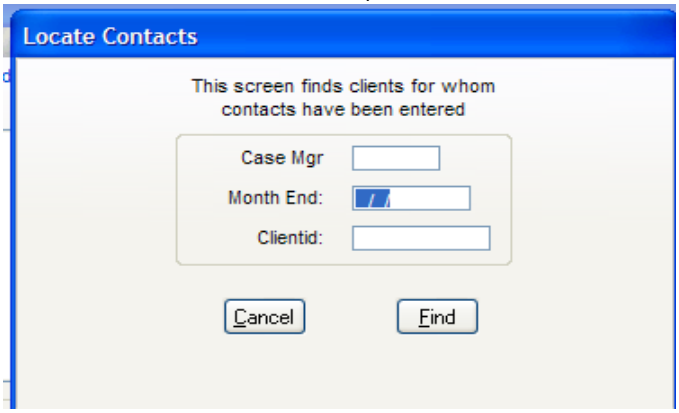
The three User Defined categories can be used to track other contact information that your agency wants to gather. Please provide your case managers with a list describing the purpose of any user defined categories you will use. Make sure that you always use the categories according to that list. Lodestar will not include these categories in summary reports.

If a new client has not been entered into the Lodestar system when the Client Contact Log is produced, the case manager should write in the name and ID # of the client at the bottom of the list and record contacts as usual.

Contacts Screen



The screen is similar in appearance to other Lodestar data entry screens. Data entry begins with a completed Client Contact Log. Once the **Contacts** module is activated from the Lodestar Control Center, the user is presented with the screen shown above. If you have previously entered contacts for the client/case manager/month for which you need to enter data, then start by clicking on the **Locate** pushbutton. (Otherwise, go to the **Add Button** section below.) This takes you to the **Locate Contacts** screen, which works in a manner similar to the **Locate** feature of the **Clients** screen. Enter your search criteria to locate the contact records you need to work with. You can locate records for a particular case manager, month ending date or client ID number, using one or a combination of these criteria. After typing in the search criteria, click on Find to initiate the search.



If multiple records meet the search conditions, a browse screen will appear from which you can choose which client's records to bring up on the **Contacts** data input screen. After highlighting the client /month you wish to work with and clicking outside the browse screen, a message "Creating Client List" will appear in the upper right of the screen. The list created is a list of all the clients for that case manager who are active or deferred as of the month you selected. This enables you to use the *Next Client* push-button on the **Contacts** data input screen to see what has been entered, or not entered, for each client. The *Next Client* push-button is explained below.

Locate is handy to use If you are not sure where you left off entering contact records in a particular month. You could enter the case manager's ID and the month-ending date as the search criteria to see all the clients for whom records have been entered for that case manager for that month.

Of you could simply enter a month-ending date to see all the case managers and clients for whom contact records have been entered for that month.
Once you've completed the Find and brought the client contacts up you then press the **Add** button to begin data entry.

Add Button

If you have previously used **Locate** to pull up a client's contact records, the new record which is created by using the **Add** pushbutton will have the case manager, month ending date and client ID already filled out, based on the record you selected from the Find. Otherwise, you will be required to select a case manager using the pull-down, Tab to the Month Ending field to enter the ending date of the month for which you wish to enter contact data, and enter the client ID number. If you enter anything but the correct last day of the month in the Month Ending field, Lodestar will automatically change the date the correct value (i.e. 02/30/.. will become 02/28/.. [or 02/29/.. in leap years], 07/30/.. will become 07/31/.., and so on). Lodestar will also check to make sure that the client ID you have selected is valid, or you will be prompted to re-enter a valid number.

Tab to the Type: field and enter the corresponding type of contact from the Contact Log. Tab to the Time field and enter the time spent, rounded to the nearest quarter-hour and entered as a decimal (or 0.00 if a contact was attempted but unsuccessful). Once you have entered a value for Time, the **Save** push-button will become active. Click on it to save the record (or, if necessary, press **Cancel** to cancel the record). If you save the record, the Type and Time will appear in the "Contacts Entered" box on the left, and a message "Creating Client List" will show at the upper right of the screen. Each time you initially select a case manager and enter a month-ending date, Lodestar creates a list of all clients active or deferred for that case manager. Once the first contact record has been entered and saved, you may add another contact record for the same client by clicking on the **Add** pushbutton. The case manager, month-ending date and client ID # are retained, and the highlight will be in the Type field. Enter the next Type and Time, **Save** the record, and, if there is another contact to add for that client, press Enter to trigger the default **Add** button, and so on. You may always click on **Cancel** to cancel data entry for a record when necessary.

Data Validations

Leaving the default zero in the Time field indicates an attempted contact. Since Lodestar cannot distinguish between purposeful omission of a Time value to indicate an attempt and inadvertent skipping over of the Time field, a beep and a message will inform you if Time was recorded as zero. This will permit you to Edit the record and enter a Time value if the field was skipped over in error.

You will not be able to enter a record for a client whose Client Identification and Update form has not already been entered into Lodestar. Please be sure to enter new Client Identification and Update forms in the **Clients** module before adding contact records.

You will also be prohibited from adding a contact record for a client whose case manager is not the case manager selected on the **Contacts** screen. Please be sure to enter all changes in case manager in the **Clients Status Change** module before adding contact records.

Next Client

Once a contact record has been entered or located, the **Next Client** push-button is enabled. Whenever you need to start adding (or viewing) contacts for a different client, click on the **Next Client** button. You can call up the next client in name order or client ID order by clicking on the radio button just below the **Next Client** push-button.

If the next client is not the one for whom you need to enter contact records, keep pushing **Next Client** until you get the client you want. You may then **Add** contact records as described above.

To add contacts for another case manager

When you are ready to do the data entry for another case manager, press the **Add** push-button. Even though the highlight will be in the Type field, use the mouse to go to the Case Manager pull-down list and select another case manager. The month-ending date will be retained, though you may change it if necessary by highlighting the field with the mouse and typing in a new date. Enter the ID of the client you want to start with. After completing and Saving the record, the case manager's client list will be created, and the **Next Client** push-button will be enabled.

Edit

Click on **Edit** to change data in the record on the screen. If you want to view or change data in one of the other contact records for that month appearing in the scrollable box on the left of the screen, you must first double click the record. Data for that record will move to the center of the screen. Make your edits and click on **Save** when you are done.

Delete

Click on **Delete** to delete the record on the screen.

The Client Contact Summary

The Client Contact Summary is found in the **Management Summary** part of the **Reports** module. As with other Lodestar reports, you may select which dates and case managers to include. As your output, you may choose between a detail report with a summary at the end or the summary report alone. After making your selections, if yours is a large agency and you have chosen to include records for a fairly lengthy time span, it may take awhile for Lodestar to do all the calculations necessary for the report, and the message "Preparing Report. One Moment" may stay on the screen for awhile.

The report shows, by case manager, how many contact hours and how many contacts have been recorded by type of contact for each client during the time span you have selected. Number of attempts is also totaled. The summary portion totals this data for all case managers selected (if you have included all case managers, the summary is for the entire agency). An example of the Contact Summary report is shown below:

Print Preview

Lodestar Report of Client Contacts

Reporting Data: All Funding Sources / - Active - Wait List - Outreached / Between: 09/01/2010 and 09/30/2010

Case Manager A006 - Anna Manager

Client Status	Contacts Made (# hrs in bold, # contacts in regular)											# Attempts										
	100	200	300	400	500	600	700	800	900	A00	Total	100	200	300	400	500	600	700	800	900	A00	Tot
Beccason, Becca 191919191 07/09/2010 Cal-Learn - Active	**0** 0	**0** 0	**0** 0	**0** 0	**0** 0	**0** 0	**0** 0	**0** 0	**0** 0	**0** 0	**0** 0	0	0	0	0	0	0	0	0	0	0	0
Sandison, Sandi 299229922 06/21/2010 Cal-Learn - Active	**0** 0	**0** 0	**0** 0	**0** 0	**0** 0	**0** 0	**0** 0	**0** 0	**0** 0	**0** 0	**0** 0	0	0	0	0	0	0	0	0	0	0	0

Print Preview

Lodestar Report of Client Contacts

Reporting Data: All Funding Sources / - Active - Wait List - Outreached / Between: 07/01/2010 and 07/31/2010

SUMMARY

	100	200	300	400	500	600	700	800	900	A00	Total
Total Contact Hours	21.50	29.75	7.75	0	55.25	1.25	11.50	4.25	0	0	131.25
Total # Contacts Made	15	34	9	0	204	5	45	17	0	0	329
Total # Attempts	1	8	1	0	162	0	3	3	0	0	178

Ad Hoc

The **Ad Hoc** module is an extremely powerful tool for generating customized reports on virtually any data which Lodestar tracks, beyond what is available in the **Reports** module. It is essentially its own program, and, as such, its use is beyond the scope of this manual. A separate, comprehensive guide to customized report generation is available in the **Lodestar Ad Hoc Reports Manual**. For further help in using the Ad Hoc module, contact Lodestar Technical Support at (707) 895-2510.

Exit

When you are finished working with Lodestar, click on **Exit** from the **Lodestar Control Panel** to leave the program. **Exit** closes all files properly and insures against data loss or corruption. You should always leave Lodestar by using the **Exit** pushbutton to activate these safeguards. Make sure to use **Exit** to leave Lodestar BEFORE shutting down your computer - NEVER turn off your computer without first **Exit**ing Lodestar. It is a good idea to **Exit** Lodestar (and any other application you are using, for that matter) if you are going to leave your computer for awhile to insure against accidental data loss.

Updating Lodestar to a New Version

Lodestar updates can be downloaded and completed easily following your monthly transmission. If a version update is available for LodeStar, a message will appear at the end of your transmission saying “An update is available for LodeStar. Do you wish to download it?” Click **Yes** if you would like to download this update. As always, everyone else must be out of Lodestar when you update. Lodestar will whiz through many notes and should complete the update and re-open in the new version. If it does not complete for some reason, you may use the **Lodestar Updater** icon to complete the process. Double click on the icon to open it and click Run Update. A message will inform you when the update is complete. Many agencies now have both the program and data for Lodestar on a server for use on multiple computers. In that case, once the program and data are updated on the server, all computers will have the updated information. If multiple computers at your agency have the LodeStar program on each computer (but data on a server), after you have updated the first machine, you will need only to run the updater icon on each machine to update the program on each machine.

What Lodestar Reports to Generate, When

The following is a recommended schedule for running Lodestar management reports:

Once a month, as soon as data entry is complete for a month:

For all clients:

Run the Follow Ups Due report for all case managers. Choose as the dates from the start of the previous month (or you may wish to go back two or three months) to the end of either the current or the next month. The end date should be about a month ahead of the current date in order to let case managers know for whom Follow Ups are due for the next month. By going back a month or two, you will also show them which Follow Ups were due but have yet to show up in the computer. Distribute the report to all case managers.

Run the Caseload Analysis report, selecting All Case Managers and choosing as the dates either the dates of the most recent month for which data entry is up to date or dates for a recent calendar quarter. This will show managers how many clients each case manager has, by program and how many clients are currently being case managed agency-wide. Distribute the report to case manager supervisors.

For Cal-Learn clients, in addition:

To obtain an accurate listing of all clients under case management for a given month, follow the procedures below:

Run the Billing List, including the Detail Listing, for the last month for which data entry is up to date. Sort it by Case Manager and then by any order you wish. Distribute the list to your case managers and ask them to make any corrections needed. Corrections may include a change in client status or transfer to a different funding source or location (the case manager should complete a Status Change form) or the addition of a new client (the case manager should complete a Client Identification and Update form). Have the case managers return the corrected list within a specified time limit (2 or 3 days preferred). Enter the corrections into the computer.

Run the Billing List again (now corrected), agency-wide, sorted by whatever order is useful to you. Depending on your contract with the CWD, you may need to turn this in to the CWD, or it will serve as back-up for your invoice to the CWD.

Run the Stat 45 Report for the most recent month for which data entry is up to date. The Stat 45 report is the report that CWDs must provide to the State DSS every month. If you wish supporting client-by-client detail for the summary figures on the report (e.g. teens brought forward from last month, teens assigned a status this month, exemptions and deferrals by reason, etc), include the Detail Listing sorted in whatever way is most useful to your agency. If you are a County Welfare Department (CWD), the summary report may be sent to CDSS, and the Detail Listing supports the summary figures you are transmitting. If you are an agency contracting with the CWD, both reports may be used to provide information to the CWD and/or to reconcile your in-house accounting of the status of your clients with lists or counts generated by the CWD.

For AFLP Clients, in addition:

Run the Months of Service report, choosing as the dates from the start of the fiscal year to the end of the most recent month for which data entry is up to date. This will indicate how well you are meeting your contracted months of service requirement as stated in the Scope of Work section of your MCH contract.

As Needed, for all clients:

Generate a Client Roster for all pay sources for all case managers, sorting the list by Case Manager and then by whatever order is most useful to you. Distribute the roster to each of your case managers as an up-to-date list of client names, addresses, phones, ages, index children's names and ages, etc.

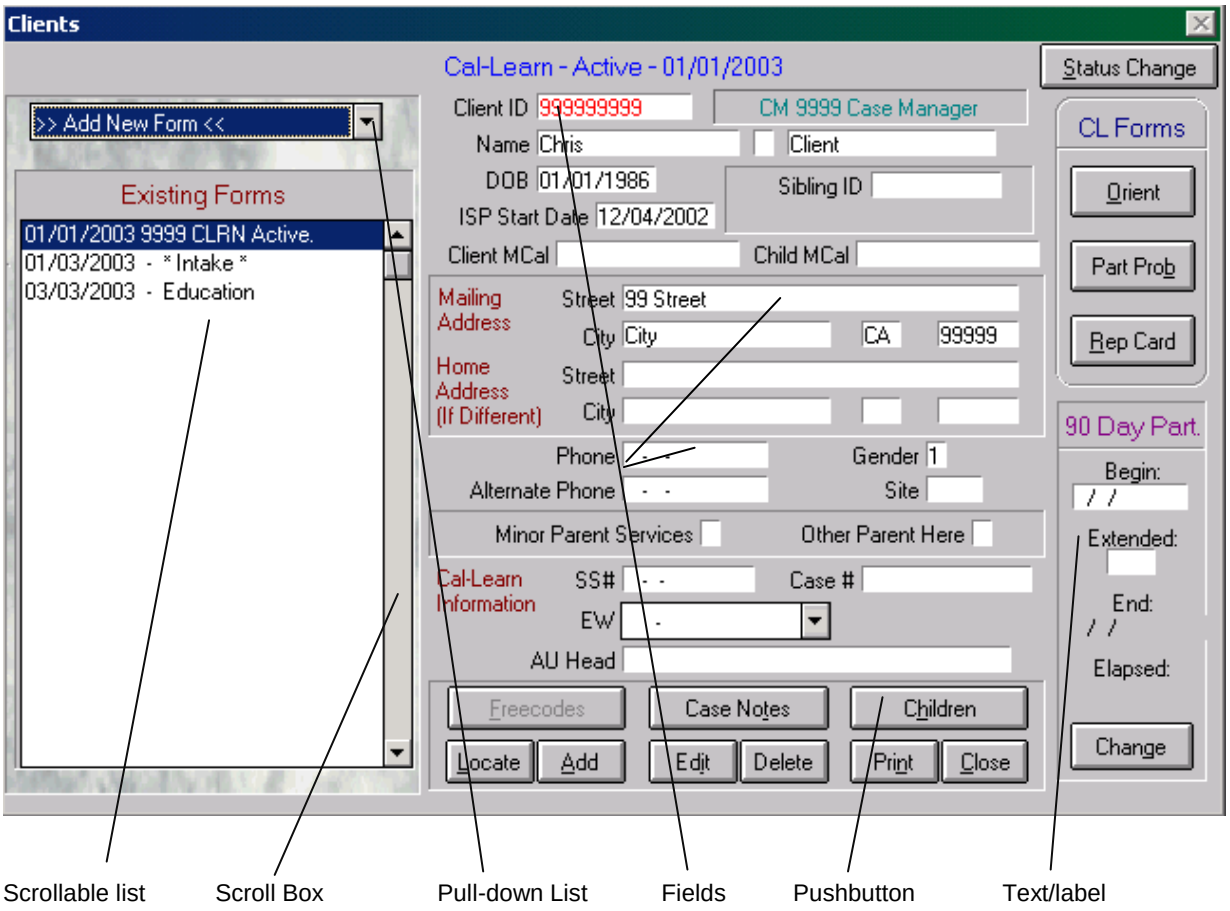
Lodestar Basics

The Mouse

Lodestar, in common with all Windows-based software, invites extensive use of a mouse. The mouse functions through its pointer, which is usually in the shape of an outlined arrow in Lodestar, and its left mouse button. Your mouse may have two or three buttons, but only the left button is used in Lodestar. When the pointer is positioned over an object in Lodestar (see the explanation of "Objects" immediately below), clicking the mouse button once by quickly depressing and letting it up invokes the function pointed to or, in the case of fields in which data will be entered, positions the cursor in the field.

Objects

Lodestar works with "objects" on the screen (which in Windows parlance is often called a "Window"). The **Clients** screen illustrates many of the objects found in Lodestar.



Pushbuttons

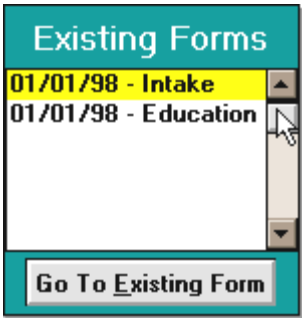
Pushbuttons invoke actions. They do a lot of work in Lodestar. They usually look like raised rectangular bars but can also be differently shaped. To activate a pushbutton, place the mouse pointer on it and click. "Click" means to quickly depress and let up the left mouse button.

Whenever there are several pushbuttons that give a choice of actions to take, a letter on each pushbutton will be underlined (see, for example, **Cancel** above). You may also activate a pushbutton by pressing the `Alt` key together with the underlined letter. In addition, if a narrow dotted line appears around one of the pushbuttons (e.g., on the **Clients** screen, above, the dotted line is around **Locate**.) this indicates that it is the "default" pushbutton. If you press the Enter key, the default pushbutton will be activated.

Pushbuttons which are available for your use are labeled in bold black letters. Pushbuttons which are "grayed out" (labeled in dimmed letters) are not available to you during your current operation. For example, if you choose to **Add** a Client Identification form, the pushbuttons for **Locate**, **Edit**, **Print** and **Close** are grayed out. You cannot take these actions while you are adding a record. After you have finished adding the record, the rest of the pushbuttons become available again. There are also times when new pushbuttons functions appear to replace previous ones. When you are adding a record, the pushbuttons available at the bottom of the screen are changed to **Save** and **Cancel**. After the record has been saved or canceled, the original pushbuttons again appear.

The **Save** and **Cancel** pushbuttons need special mention. These are found at the bottom of most Lodestar data entry screens. Data you enter is not saved until you click the **Save** pushbutton. This is true whether you are adding a new record or editing an existing record. In general, you should only see Save and Cancel at the bottom of your screen if you are actively editing or adding a record. If you leave your machine in this mode, and a power outage occurs or your computer crashes, you could lose valuable information if you have not saved your work. If you wish to save your entry, choose **Save**. Otherwise, choose **Cancel**.

Scrollable Lists

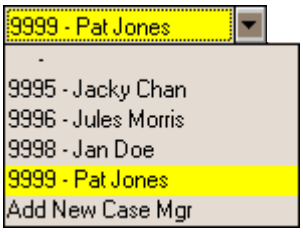


Scrollable lists permit choosing an item from a pre-entered list. Scrollable lists have thick down and up arrows (called scroll arrows) and a scroll box at the right edge. You can scroll the list down or up by placing the mouse pointer on the scroll arrow and either clicking (a click will scroll up or down one line) or holding down the mouse button and moving the pointer in the direction of the arrow (this exerts a continuous scroll).

For large lists, which you will encounter when you preview some of Lodestar's reports, you may instead want to move the scroll box (see illustration on previous page) down or up. You do this by pointing to the scroll box, holding down the mouse button, moving the box and then releasing the mouse button. The scroll box goes to a place in the list relative to its position on the vertical glide track. For example, if you move it halfway down the track, it will move halfway down the list.

To select an item on the list, place the highlight over it (you may then have to take further action such as to click on a pushbutton to access the data to work with.) On the **Clients** screen, the scrollable list enables the user to pick out which case management reporting period record to edit.

Pull-down Lists



Pull-down lists are similar to scrollable lists except that they are at first "closed," with only data (if any) in the first field and a thick Down Arrow showing. A pull-down list on the **Clients** screen permits the user to select which case manager to enter into the client identification section. To select an entry in the list, click on the thick Down Arrow. When the list opens, scroll it if you need to, using the mouse and directional arrows or the scroll bar. Place the highlight over the choice you want and click the mouse button. Your choice will pop into the field and the pull-down list will close.

If the list is comprised of entries you maintain yourself - for example, case manager Ids, EW Ids and locations where you may meet with clients - and you don't see the entry you need, you may add a record to the list on the fly by scrolling to the bottom of the list and clicking on the **Add New...** choice. A data entry screen permitting the addition of a new record will appear. After you complete it and click **Save** and then **Close**, you may select it from the pull-down list.

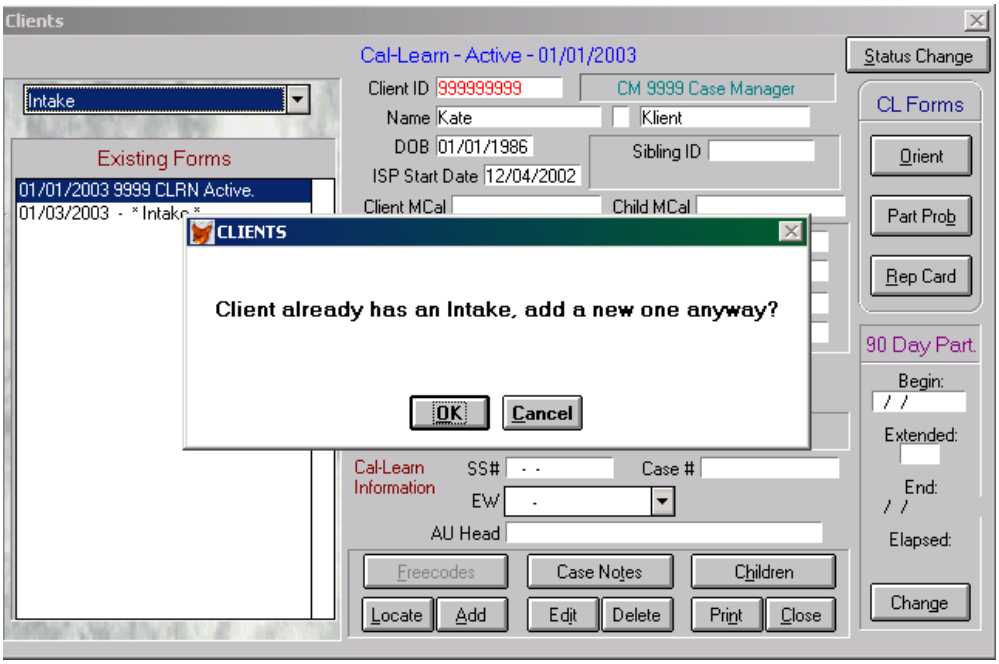
Fields and Text/Labels

Fields are containers for data. You enter all data in fields. They are represented by a rectangular area next to the field label. Client ID

Text, or labels, indicate what the objects are used for. **Client ID** to the left of the field above is the label for the field.

Dialog Boxes

Dialog boxes are special windows that pop up in Lodestar when input is needed from the user as to how or, in some cases, *whether*, to continue with an operation. They often appear in situations where the user is trying to do something that the system recognizes as slightly out of the ordinary, or which might have serious consequences if done by mistake. (Certain smaller sub-windows that allow for on-the-fly changes in standard settings are also referred to as dialog boxes, such as the Print dialog box.)

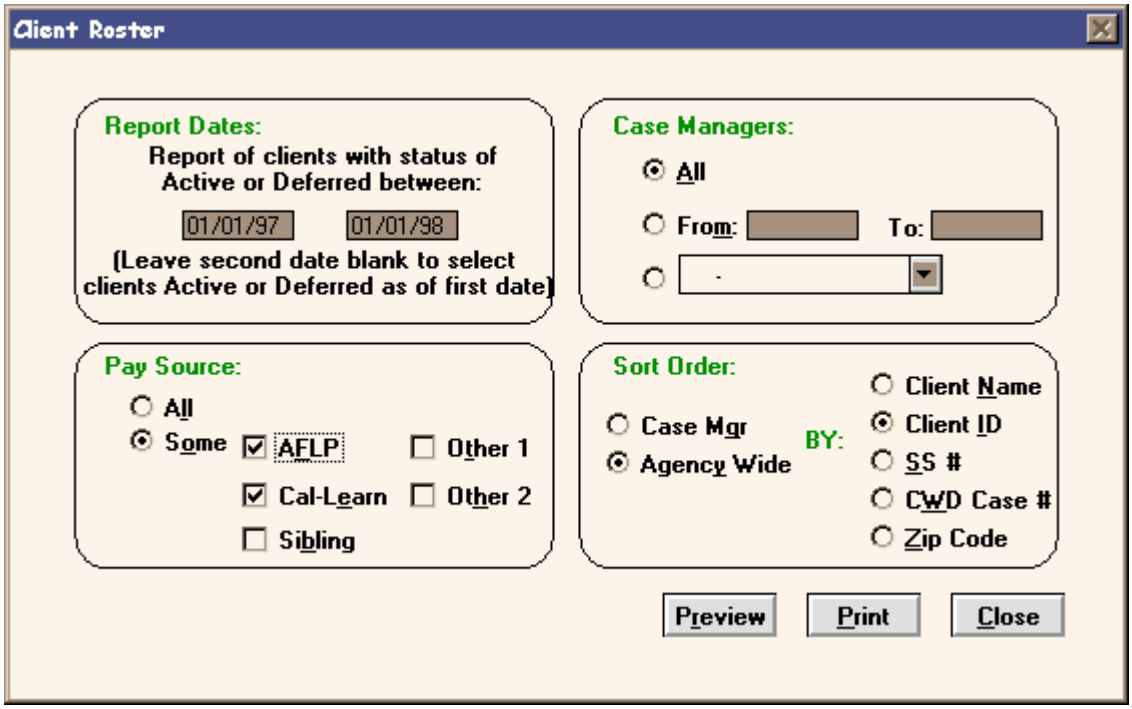


In the example above, the user has just clicked on the **Intake** pushbutton under the Add New Form section of the **Clients** screen. Normally this would have taken her/him to a new, blank Intake screen, but because an Intake already exists for this client, a dialog box appears asking, "Client already has an Intake, add a new one anyway?" If the user *did* mean to add a new Intake (because the Index Child died, for example), s/he should click on the **OK** pushbutton and continue to add the new Intake. If the Intake button was clicked in error (because what the user really wanted to do was to edit the existing error-flagged Intake but accidentally hit **Intake** instead of **Go To Existing Form**, for example), then s/he should click on **Cancel**. Lodestar will then back out of the action and return the user to the **Clients** screen.

Icons

In addition to the objects found on Lodestar screens, icons in the Lodestar Group on the Windows desktop also invoke actions. The red square with star icon accesses the main Lodestar program. You must double-click the Program a white the Windows desktop to trigger the action. Double-clicking means to icons on depress and release the left mouse button twice in rapid succession. Inside Lodestar, all icon objects are activated with just a *single* click of the left mouse button.

Other Objects



In the Client Roster screen above, there are pushbuttons to choose actions, fields and pull-downs for entering data, and also two other kinds of Windows objects, **Radio Buttons** and **Check Boxes**. A **Radio Button** is a circle which, when selected (clicked on), contains a large black dot. The choices displayed by radio buttons are mutually exclusive; you can only select one. (In the example, you cannot select both **All** and **Some** under "Pay Source." **Some** has been selected, as indicated by the black dot in the circle next to it.) A **Check Box** is a square box which, when selected (clicked on), contains a "√" or and "**X**". The "√" or "**X**" means “include this.” In the above example, of the pay sources available under **Some**, both **AFLP** and **Cal-Learn** have been selected for inclusion for this Client Roster. Check boxes are individual objects that can either be selected (turned on) or not selected (turned off). Both radio buttons and check boxes collect a choice from the user.

Getting Around in Lodestar's Data Entry Screens

Data is entered into fields in Lodestar. For the most part, you type the data into the field. For certain fields, there are scrollable or pull-down lists from which you select a value, and Lodestar automatically enters that value for you. This is the case with the fields for Case Manager (**CM**) and Eligibility Worker (**EW**) on the Client Identification section of the **Clients** screen. Many of the data items entered into Lodestar fields are validated; that is, only the values available on Lodestar forms are allowed. If you enter an invalid value, Lodestar will display a message showing the allowed values and asking you to re-enter one of them.

If the data you enter fills up the entire field, the highlight will jump to the next field. If it consumes only part of the field, you must press the `Tab` key to move to the next field. If you wish to skip a field that isn't mandatory and for which there is no data, you can press `Tab` to skip over one field at a time, or you may position the mouse pointer at the start of the next field you wish to enter data in and then click when the pointer takes on the shape of an I-beam. If you make a mistake in entering data, you can press `Shift-Tab` to go back to a previous field. This means holding down the `Shift` key, pressing the `Tab` key and then releasing both keys. Or you may highlight the field containing the incorrect data and type in your correction(s).

To delete data in a field, the cursor or the highlight must be in the field. To place the cursor in the field, position the mouse pointer on the field and, when the pointer becomes an I-beam, click the left mouse button. The blinking vertical cursor appears at the insertion point. If the cursor is at the start of the field, pressing `Ctrl-Y` will delete all the data in the field. You can also use the `Backspace` key to delete letters to the left or the `Del` key to delete letters to the right of the cursor.

To highlight a field, depress the mouse button and sweep the mouse pointer from left to right or right to left over the entire field. Once you start to type in new data, any old data in the highlighted field is automatically deleted. You may also highlight *portions* of a field in order to correct some but not all data in that field.

If you have selected a choice from a pull-down list, you cannot delete it, but it will do no harm if the rest of the record is incomplete. If you eventually complete the record, you can change values derived from pull-down lists if you need to. The same is true for radio buttons that have been selected. You can't get rid of the black dot but it will do no harm if the rest of the record is incomplete.

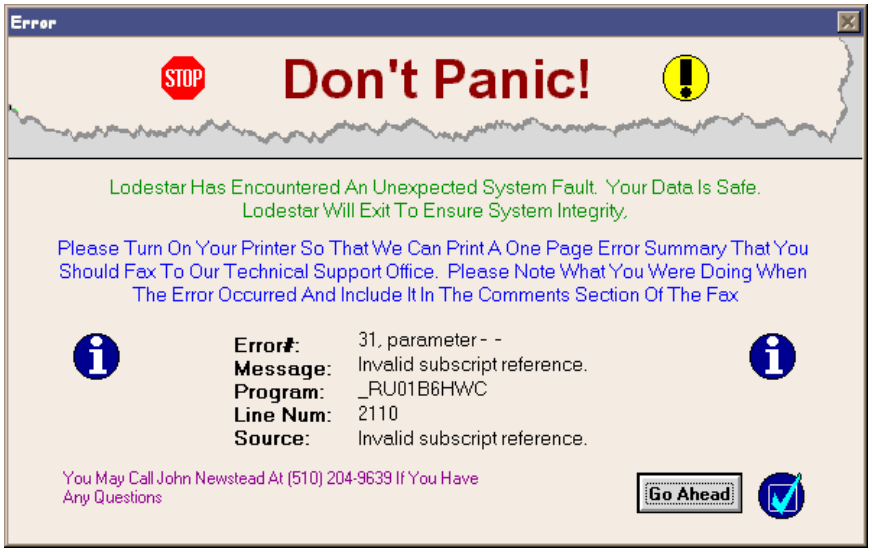
The `Esc` (escape) Key

As its name implies, the `Esc` (escape) key, usually located at the upper left of the keyboard, enables you to back out of some actions. You should attempt to back out of an action first by using any **Close** or **Cancel** pushbutton on the screen, but if no such action is available or accessible, you may try pressing `Esc`. Depending on what you are doing in Lodestar, the `Esc` key may or may not have an effect. If you are printing a report, for example, hitting `Esc` will not stop the printing. If you are entering or editing a form, however, pressing `Esc` has the same effect as activating the **Cancel** pushbutton.

Error Handling

There are two kinds of errors that may occur while using Lodestar. One is the kind made by the user - for example, entering an invalid code for a data item. For this kind of error, Lodestar displays a screen giving instructions as to how to correct the error. Additional detail is provided under **Adding a Record** in the ***Case Management*** section of the manual.

The other kind of error that can occur is a program “bug.” These can be caused by use of the software in unanticipated ways, or they may exist in the software and be revealed only when a user ventures into seldom-used parts of the program. It can takes months to uncover obscure program bugs, as debugging has already been done for all aspects of the program that are commonly used.



If a program bug occurs, Lodestar will display a "Don't Panic" screen. This is an error screen advising you of what error occurred and allowing you to print out an error report to be faxed to Lodestar Technical Support. Make sure your printer is turned on and online, and then click on **Go Ahead**. Once the report is printed, Lodestar will close all open files and exit. Don’t panic - your data will be safe. Note on the fax what you were doing when the error happened to help us understand why it happened. Fax the report to the number on the report. While you should be able to restart Lodestar and continue as you normally would, it is always a good idea to check with Lodestar Technical Support *first* whenever you encounter a bug.

Definitions

Activate	Activate means to click on a pushbutton or open a pull-down list (see ***Lodestar Basics*** for techniques).
AFLP	The Adolescent Family Life Program, a program funded by the Maternal and Child Health Branch, State Department of Health Services (MCH).
ASPPP	The Adolescent Sibling Pregnancy Prevention Program, also funded by MCH.
CDSS	California State Department of Social Services.
Click Click in Click on	Click, click in and click on mean to position the mouse pointer on an object and quickly depress and let up the left mouse button.
Cursor	The cursor marks the place on the screen where input from your keyboard will appear. The cursor appears as a blinking vertical black line. You may place the cursor by pointing with the mouse to where you want to enter data and, when the pointer assumes the shape of an I-beam, clicking on the mouse button. See also Highlight.
CWD	County Welfare Department
Data	Pieces of information, such as codes or names. "Data" is actually a plural Latin noun (the singular is "datum") and should technically be used with a plural verb. In keeping with standard practice, however, this manual generally uses "data" with a singular verb (e.g. "Data is entered into the various fields in Lodestar," rather than "Data *are* entered into the various fields in Lodestar"). While less strictly correct, this seems closer to natural spoken usage.
Data item or data element	A component of data. **Client's Last Name** is a data item. "Brown" is an example of the kind of data that might go into the item. The Lodestar forms contain many data items. Generally, data items on forms correspond to data *fields* in Lodestar screens.

Default	The pre-selected Lodestar function/object/value that will be activated/chosen/selected unless you override the selection. The **Locate** button on the **Clients** screen is the default when you first enter the screen from the **Lodestar Control Center**. There is always a default pushbutton in a set of pushbuttons, and it is indicated by the dotted line around the pushbutton. Radio Buttons and Check Lists often show default selections as well via black dots or checkmarks/Xs, respectively. You can always select another object or value when you need to.
Double-click	To position the mouse pointer on an object and quickly depress and let up the left mouse button twice in succession.
Highlight	A shaded area that identifies a field or an item in a scrollable or pull-down list. The highlight tells you where you are. As you move from field to field when adding or editing a record, the highlight appears in the field that is ready to accept your input. The color of the highlight depends on how Windows has been set up for you. It should always contrast with the color of surrounding fields or text.
MCH	The Maternal and Child Health Branch, State Department of Health Services.
Mouse pointer	The mouse pointer is the arrow symbol that points to a place on the screen. It looks more or less like this: . You position it using the mouse. When the pointer is in a field, it assumes the shape of an I-beam: . When it does, clicking the left mouse button turns the pointer into a blinking cursor: .
Value	A value is a code, number, name or other bit of information that can be entered into a field. The field for Sex on the Lodestar Intake form can have two values, 1 or 2, for example.

APPENDIX

LODESTAR AGENCY LIST

County	Organization	Agency #
Alameda	Tiburcio Vasquez	01-006
Alameda	Brighter Beginnings	01-093
Alpine	Alpine County Dept Social Services	02-512
Amador	Amador County Dept Social Services	03-515
Butte	Northern Valley Catholic Social Service	04-094
Calaveras	Calaveras County Dept Social Services	05-521
Colusa	Colusa County Dept Social Services	06-530
Contra Costa	Brighter Beginnings	07-095
Del Norte	Del Norte County Dept Public Health	08-538
El Dorado	El Dorado County Cal-learn	09-541
Fresno	Fresno County DSS	10-096
Glenn	Glenn County AFLP	11-543
Humboldt	Humboldt County Cal Learn	12-100
Imperial	Imperial County AFLP	13-201
Imperial	Imperial County GAIN	13-556
Inyo	Inyo County HHS-Cal-Learn	14-559
Kern	Clinica Sierra Vista	15-057
Kings	Kings County Community Action	16-013
Lake	Lake County Teen Parenting Services	17-098
Lassen	Lassen County AFLP/Cal-Learn	18-573
Los Angeles	El Nido Services	19-070
Los Angeles	Children's Hospital - Project NATEEN	19-099
Los Angeles	Foothill Family Services - Pasadena	19-100
Los Angeles	Altamed Health Services - East LA	19-101
Los Angeles	Altamed Health Services - Long Beach	19-109
Madera	Madera County AFLP	20-588
Marin	Marin County GAIN	21-588
Mariposa	Mariposa County Dept Social Services	22-590
Mendocino	Mendocino Cal Learn & AFLP	23-592
Merced	Merced County Young Parents Program	24-028
Merced	Merced County Human Services Agency	24-594

Monterey	County of Monterey Cal-Learn	27-202
Napa	Napa County Planned Parenthood	28-603
Nevada	Nevada Joint Union High	29-102
Nevada	Nevada County Cal Learn	29-555
Orange	Orange County AFLP	30-030
Orange	Orange County Cal Learn	30-607
Placer	Placer County Health Department	31-103
Riverside	Riverside County Health Department	33-032
Sacramento	Sutter Center for Women's Health	34-033
San Benito	San Benito AFLP	35-627
San Bernardino	DPH Perinatal & Adolescent Life Section	36-035
San Diego	SANDAPP/CAL-LEARN Program	37-104
San Francisco	Family Services of San Francisco	38-040
San Francisco	San Francisco Cal Learn	38-222
San Joaquin	San Joaquin Public Health, AFLP	39-107
San Luis Obispo	SLO County Public Health Dept.	40-659
San Mateo	San Mateo County Health Services	41-203
Santa Barbara	Santa Barbara County CL	42-108
Santa Barbara	Santa Barbara TAPP AFLP	42-333
Santa Clara	Santa Clara Planned Parenthood Marmonte	43-109
Santa Cruz	Santa Cruz AFLP	44-204
Santa Cruz	Santa Cruz County Human Resources Agency	44-676
Shasta	N Valley Catholic Social Services	45-110
Sierra	Sierra County Dept Social Services	46-681
Siskiyou	Siskiyou County Office of Education	47-210
Solano	Solano County Planned Parenthood	48-205
Sonoma	Sonoma County Health Department	49-056
Stanislaus	Stanislaus County Health Department	50-051
Sutter	Sutter County Employment Services	51-696
Tehama	Tehama County Cal-Learn	52-500
Tehama	Tehama AFLP	52-698
Trinity	Trinity County Dept Health & Human Svcs	53-670
Tulare	Tulare Co Health & Human Services Agency	54-052
Tuolumne	Tuolumne County Dept Social Services	55-724
Ventura	Ventura County Cal Learn Program	56-112
Yolo	Yolo County Cal-Learn	57-113

Yolo	Yolo AFLP	57-444
Yuba	Yuba County Dept of Social Services	58-683

AFLP / ASPPP / Cal Learn Race / Ethnicity Codes

Choose the Category That You Most Identify With

100 ASIAN or PACIFIC ISLANDER

110 Chinese
120 Japanese
130 Korean

Southeast Asian
- 141 Vietnamese
- 142 Cambodian
- 143 Hmong
- 144 Laotian
- 145 Thai
- 149 Other Southeast Asian

150 Other Asian
- 151 Asian Indian

Polynesian
- 161 Hawaiian
- 162 Samoan
- 163 Tongan
- 169 Other Polynesian

Micronesian
- 171 Guamanian
- 179 Other Micronesian

180 Melanesian
185 Filipino
190 Other Pacific Islander

200 AFRICAN AMERICAN (Black)

300 CAUCASIAN (White)

400 HISPANIC / LATINO

Central American
- 411 Mexican
- 412 Guatemalan
- 413 Costa Rican
- 414 Salvadoran
- 415 Nicaraguan
- 416 Panamanian
- 429 Other Central American

South American
- 431 Argentinean
- 432 Bolivian
- 433 Chilean
- 434 Colombian
- 435 Ecuadorian
- 436 Paraguayan
- 437 Peruvian
- 438 Uruguayan
- 439 Venezuelan
- 459 Other South American

Other Hispanic/Latino
- 461 Cuban
- 462 Puerto Rican
- 463 Dominican
- 464 Spaniard
- 499 Other Hispanic/Latino not listed

500 AMERICAN INDIAN / ALASKAN NATIVE

510 North American Indian

570 Central American Indian

580 South American Indian

590 Alaskan Native
- 591 Eskimo (Caizo)
- 592 Aleut

INTER-RACIAL

Caucasian and
- 611 Asian/Pacific Islander
- 612 African American
- 613 American Indian
- 614 Hispanic/Latino
- 619 Other Caucasian combination

African American and
- 621 Asian/Pacific Islander
- 622 Caucasian
- 623 American Indian
- 624 Hispanic/Latino
- 629 Other African American combination

Asian/Pacific Islander and
- 631 African American
- 632 Caucasian
- 633 American Indian
- 634 Hispanic/Latino
- 639 Other Asian/Pacific Islander combination

American Indian and
- 641 African American
- 642 Caucasian
- 643 Asian/Pacific Islander
- 644 Hispanic/Latino
- 649 Other American Indian combination

Hispanic/Latino and
- 651 African American
- 652 Caucasian
- 653 American Indian
- 654 Asian/Pacific Islander
- 659 Other Hispanic/Latino combination

700 OTHER
999 REFUSE TO ANSWER

AFLP Primary Language List

Code	Language
156	Albanian
170	American Sign Language
111	Arabic
112	Armenian
142	Assyrian
161	Bengali
113	Burmese
103	Cantonese
136	Cebuano
154	Chaldean (Visayan)
120	Chamorro (Guamanian)
139	Chaozhou (Chiuchow)
115	Dutch
100	English
116	Farsi (Persian)
105	Filipino (Pilipino or Tagalog)
117	French
118	German
119	Greek
143	Gujarati
121	Hebrew
122	Hindi
123	Hmong
124	Hungarian
125	Ilocano
126	Indonesian
127	Italian
108	Japanese
109	Khmer (Cambodian)
150	Khmu
104	Korean

Code	Language
151	Kurdish (Kurdi, Kurmanji
147	Lahu
110	Lao
107	Mandarin (Putonghua)
148	Marshallese
144	Mien (Yao)
149	Mixteco
140	Pashto
141	Polish
106	Portuguese
128	Punjabi
145	Rumanian
129	Russian
130	Samoan
152	Serbo-Croatian (Bosnian,Croatian,Serbian)
160	Somali
101	Spanish
146	Taiwanese
132	Thai
157	Tigrinya
153	Toishanese
134	Tongan
133	Turkish
138	Ukranian
135	Urdu
102	Vietnamese
188	Refused to answer
199	All other Non-English languages

INDEX

Activate
  Definition, 85
Ad Hoc, 10, 74
Add
  90-day participation period data, 37
  Case management record, 26
  Client Identification and Update form, 14
  Follow Up, 26
  Free codes form, 30
  Orientation data, 35
  Pregnancy Outcome, 26
  Report Cards, 36
  Service Matrix/Additional Outcomes record, 30
  Setup records, 62
  Status Change form, 19
Add New Form, 26
Additional Child Matrix, 17
  Adding from reporting period screen, 30
  Editing, 33
Additional Outcomes
  Add, 30
AFLP, 5, 6
  Definition, 85
Agency
  Name and Number, 9
`Alt` key, 7, 79
ASPPP, 5, 6
  Definition, 85
Backup, 63
Billing List, 44
Bug, 84
Cal-Learn, 5, 6, 10
Cal-Learn Forms, 35
Case Management record
  Add, 26
  Edit, 32, 33
Case Managers
  Deleting in Setup Staff screen, 62
  Selecting on reports, 41
Case Notes, 16
Caseload Analysis, 48
  Use in waitlisting, 24, 25
CDSS
  Definition, 85
Change of Case Manager, 22
Changing an Index Child, 32
Child Immunization Report, 49
Children
  Clients Screen. *See also* Additional Child Matrix
CL-10 form (Exemption/Deferral Notice)
  Previewing or Printing, 20
Click
  Definition, 85
Client Contact Summary, 49, 73
Client Identification, 11
Client Identification and Update form
  Add, 14
  Data form, 11
  Edit or delete, 15
  Print, 16
Client Lists reports, 39
Client Roster Report
  use in waitlisting, 24
Clients, 9
Close
  Clients Screen, 18
Comparison Report, 50
Computer
  Exiting Lodestar before turning off, 10
Contact Log, 45, 69
Contact Tracking, 69
Contacts, 10, 69
Contracted annual months of service
  Updating in Setup, 51
Conventions, 7
Create Transfer Sheet, 21
Currently Active Clients Only
  Selecting on Follow Ups Due reports, 46
Cursor
  Definition, 85
CWD
  Definition, 85
Data
  Definition, 85
Data element
  Definition, 85
Data entry techniques, 83
Data item
  Definition, 85
Database Repair, 60
Data-Cleaning Reports, 59
Death
  Recording for Index Child, 32
Default
  Definition, 86
Deferred Status
  Adding, 19
Definitions, 85
Delete
  Client identification record, 16
  Reporting period record, 33
  Setup records, 62
  Status Change record, 26
Demographic Reports, 54
Dialog boxes, 81
Double-click
  Definition, 86
Edit
  90-day participation period data, 38
  Case management record, 32, 33
  Client identification record, 15
  Follow Up, 32, 33
  Free Codes, 33
  Intake, 32, 33
  Orientation data, 35
  Participation problem data, 35

Pregnancy Outcome, 32, 33
Report card outcome form, 36
Report Cards, 36
Service Matrix, 33
Setup records, 62
Status Change record, 22
Education Form
Delete, 33
Error handling, 84
Error-flagged records, 34
Errors, data entry
Correcting, 83
Error window, 28
ESC key, 83
Exempt Status
Adding, 19
Exemption/Deferral Notice (CL-10)
Previewing or Printing, 20
Exit, 10, 75
Export Detail to...
On Billing list, 45
FFP matching results
receiving, 67
Fields, 80
Find a Client Record. *See* Locate
Follow Up
Add, 26
Delete, 33
Edit, 32, 33
Freecodes
Editing, 33
Funding Source
Status Change Screen, 19
Go To button, 33
Highlight
Definition, 86
Hot-key, 7
Index Child, 32
Changing, 32
Recording death or loss of custody of, 32
Ineligible NOA (NA 843)
Previewing or Printing, 20, 21
Ineligible Status
Adding, 19
Initial Funding Source, 14
Intake
Add, 27
Adding before other forms, 27
Delete, 33
Edit, 32, 33
L.A. Case Assignment, 59
L.A. County, 58
L.A. Performance Measures, 59
Labels/Text, 80
Length of Enrollment, 47
Locate, 11, 26
Error-flagged records, 13
Setup records, 61
Location
Transfering to new, 20
Lodestar Basics, 78
Lodestar Control Center, 8, 9, 18
Log-on Screen, 8
Loss of Custody
Recording for Index Child, 32
Management Summary reports, 39
MCH
Definition, 86
Send Data by Disk, 67
Transmit Data by Internet, 66
Medi-Cal, 9, 38
Merge Client ID, 65
Miscellaneous, 65
Months of Service, 50
Mouse pointer
Definition, 86
Multiple Birth
And Additional Child Matrix, 31
NA 843 (Ineligible NOA)
Previewing or Printing, 20, 21
Orientation data
Add, 35
Edit, 35
Outreach Clients, 23
Participation Problem data
Add, 35
Edit, 35
Pay Source
Selecting on reports, 41
Pregnancy Outcome
Add, 26
Delete, 33
Edit, 32, 33
Previous Index Child
On Additional Child Matrix, 33
Print
Cal-Learn forms and NOAs, 37
Page preview screen, 42
Print dialog box, 43
Setup screen, 44
Program bug, 84
Progression Reports, 56
Pseudo-case manager
use in waitlisting, 24
Pulldown lists, 80
Pushbuttons, 79
Report card outcome form
Edit, 36
Report Cards, 36
Add, 36
Edit, 36
Report screen, 40
Reporting period
Delete, 33
Reports, 9, 39
Billing List, 44
Caseload Analysis, 48
Child Immunization, 49
Client Contact Summary, 49
Client roster, 40
Comparison Report, 50
Contact Log, 45

Data Cleaning, 59
Demographic Reports, 54
Follow-Ups Due, 46
L.A. Case Assignment, 59
L.A. Performance Measures, 59
L.A.County, 58
Length of Enrollment, 47
Months of Service, 50
Other Caseload Analysis, 49
Other Months of Service, 52
Progression Reports, 56
School Roster, 47
Stat 45, 52
Unduplicated Client Count, 52
What and when to run, 76
School Roster, 47
Scrollable lists, 79
Search criteria. *See* Locate
Send MCH Data by Disk, 67
Service Matrix
Add, 30
Adding later, editing, 33
Setup, 60
Add, 60
Delete Data, 60
Edit, 60
Funding Sources, 60
Locations, 60
Lodestar Users, 60
Schools, 60
Staff, 60
This Site, 61
use in waitlisting, 24
Sibling, 5, 6
Sort order
Selecting on reports, 41
Staff Setup
use in waitlisting, 24
Stat 45, 52
Status Change, 19
Creating a New Status Record, 19
Delete record, 26
Edit record, 22
Outreach Clients, 23
Waiver End Date, 23
Supervision, 6
System, 60
Terminated Status
Adding, 19
Text/Labels, 80
Timestamp, 11
Transfer Sheet
Creating, 21
Transfer, entering a, 20
Transfer a Cal-Learn client, 21
Transfer an AFLP/ASPPP client, 20
Transmit Data, 9
Transmit MCH Data by internet, 66
Troubleshoot, 64
Unduplicated Client Count, 52
Updating Lodestar, 75
Utilities, 9, 60
Value
Definition, 86
Wait List
Cal-Learn Clients. *See* Deferred Status
Wait List, 24
Waiver End Date, 23
Welcome Screen, 8
Windows, 5, 78
With Status
Selecting on reports, 41