PDA TECHNICAL ASSISTANCE MANUAL FOR KENTUCKY SUBSTANCE ABUSE TREATMENT OUTCOME STUDY PROGRAMS

KTOS, AKTOS, R-KTOS, DCBS KTOS, & KORTOS

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OVERVIEW, TIPS & TROUBLESHOOTING

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University of Kentucky CDAR
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Overview of the Data Collection Systems

Your Personal Digital Assistant (PDA) has been assigned to you by the Division of Behavioral Health to be used for collecting data using the PDA-based programs: KTOS (Adults ages 18-99), AKTOS (Adolescents ages 12-17), Recovery KTOS, DCBS KTOS, or KORTOS. When you are ready to begin recording client responses to the interview – open the program by tapping on the appropriate icon on your PDA menu screen.

The Kentucky treatment outcomes study programs are designed to measure what happens to individuals who participate in Kentucky’s substance abuse treatment, medication assisted treatment, or recovery services. Data includes information collected from clients when they enter a treatment or recovery program and at follow-up. The studies compare client self-report information from the two data collection times. Programs that are funded by either the Substance Abuse Prevention and Treatment Block Grant or the Kentucky general funds must participate in data collection.

Results from these studies help answer key questions that are being posed by legislators and funding agencies. For example, after receiving treatment and recovery services do clients…
- Have increased employment stability?
- Report decreased mental health problems?
- Have decreased criminal justice involvement?
- Report more positive social activities?

What type of data collection is expected from me?

For each of your clients, you should complete a baseline interview. A client is anyone ages 12-99 who receives state-funded treatment services. The baseline interview is to be completed after you have established rapport and have an alliance with your client. The goal of the baseline interview is to take a picture of your client at the very beginning of the intervention – prior to providing services for an extended period of time.

Recovery KTOS and DCBS KTOS have an additional discharge data collection piece. This is not an interview and does not have to be completed with the client. Clinical staff should enter discharge information based on their last contact with the client.

Who is responsible for completing the follow-up interview data collection with clients?

UK CDAR will take care of the follow-up interviews. Clients who have volunteered to participate in the follow-up study by signing the electronic consent form on the PDA and providing accurate locator information (phone number, contact address, etc...) may be called for a brief interview. Only a sample of about 20% of eligible clients are called due to the large number of potential follow-up interviews.

When a client agrees to participate in the follow-up study, you will give them a paper copy of the consent form to keep. *** NO paper forms should be sent to UK. ***
If a client has concerns about the follow-up study or wants to update contact information, the client can call the phone numbers listed on the paper consent form that was given to them at baseline.

**How do I know that my client data are protected?**

The PDA automatically requires you to enter a password every time you turn it on and allows you to safely store data on the PDA. **Do not change or turn off this password** – the computer that receives your data will not be able to recognize your PDA and you will leave your data unsecured.

In addition, the PDA program encrypts your data when you enter it on the PDA. It then erases records off the PDA once they have been uploaded to the main server from your HotSync operation.

All data sent to us through your HotSync operation is stored in a password protected and encrypted file on our server PCs. Only authorized staff may view the unencrypted data. Tables used for data analysis and reports are all non-identified to further protect your clients.

**Where can I get copies of the consent form or review training information?**

The following websites include important information for you and your treatment program. You can download and print the follow-up consent forms, review training materials, or email UK staff with questions. The website is located at:

- **KTOS and AKTOS** [http://cdar.uky.edu/KTOS](http://cdar.uky.edu/KTOS)
- **Recovery KTOS** [http://cdar.uky.edu/rktos](http://cdar.uky.edu/rktos)
- **DCBS KTOS** [http://cdar.uky.edu/dcbsktos](http://cdar.uky.edu/dcbsktos)
- **KORTOS** [http://cdar.uky.edu/kortos](http://cdar.uky.edu/kortos)

In addition, the website allows you to review the number of records that your program and each PDA have sent to UK. These data are updated every weekday morning by 9am.
PDAs – Basic Use and Functions

The PDA is a handy and easy to use tool for data collection. Benefits of the PDA as a data collection program include...

- It can be taken *anywhere* to do an interview and is easy to carry into the field
- It needs only a modem and phone line to send in data
- It saves time compared to paper forms
- It corrects minor errors programmatically to keep data accurate
- It is unobtrusive when interviewing a client

How to turn on the PDA

- Open the cover so you can see the main screen.
- On/Off = Black power button with green line on the top of the PDA. When turned on, the screen lights up and asks for your password.
- The stylus is tucked into the right-hand side of the PDA.
- Hold the stylus like you would a pen or pencil, light taps are all that are required. Heavy taps damage or puncture the screen. *Note: Using actual pens or pencils can scratch, damage, or permanently mark on the screen. If you feel like the screen is not responding to light taps, call UK-CDAR immediately to prevent damage.*
  - Cost for replacement of damaged PDAs or modems will be the responsibility of the person and/or agency.
- You must enter your password every time you turn on the PDA for security purposes. Contact UKCDAR if you have lost your password.
  - Do not change or turn off this password – the computer that receives your data will not be able to recognize your PDA and you will leave your data unsecured.

Recharge the PDA regularly!

Plug the PDA into the charger and plug the charger into a wall outlet. The small arrow on the tip of the plug should be facing up towards the PDA screen in order to correctly plug-in.

- Recharging takes around 20 – 30 minutes
- Charging a PDA from scratch or if the battery has died completely may take 3-4 hours.
- You cannot overcharge the PDAs. It is a good idea to leave them plugged in whenever they are not in use to make sure they are fully charged when you need to use them.
- If the battery has drained completely and the PDA will not turn on, immediately plug in the PDA.
What's on my handheld?

Front

Screen Displays the applications and information on your handheld. The screen is touch-sensitive.

Input area Lets you enter info with Graffiti® 2 writing or open the onscreen keyboard.

5-way navigator Helps you move around and select info to display on the screen.

Quick buttons Turn on your handheld and open Calendar, Contacts, Tasks, and Note Pad.

Back

Speaker Lets you listen to alarms, game and system sounds, and music.

Reset button Resets your handheld if it freezes (stops responding).

Multi-connector Lets you connect a sync cable (included) or a cradle (sold separately) to your computer so you can synchronize. Also lets you connect the AC charger to your handheld so you can charge it.

Bluetooth® radio (internal) Enables your handheld to connect with other devices (sold separately) that use Bluetooth® wireless technology.
How to Begin a Record

Baseline

To enter baseline interview responses into the PDA program....

- Turn on the PDA
- Enter your password
- Tap the icon for your program - “KTOS”, “AKTOS” or “KORTOS”. RKTOS and DCBS KTOS are found in the KTOS icon.
  - If the program icon does not appear on your screen, tap the picture of the house on the bottom left of the screen
  - The PDA will display various sets of icons. Tap until you see the icon you need in the menu.

When you open the program by tapping on the icon, you will be on the main screen. You can use this opening screen to:

1. Check the number of baseline records you have entered
2. See that the number has gone back to zero once you send the data using the modem
3. Check your battery level, date, and time.
4. Enter a baseline or discharge record

Tap the Baseline option and begin interviewing the client and entering responses.

- **Note to Recovery KTOS:** When a client enters Phase 1, they should complete the baseline interview sometime during their first week in the program.
Discharge for RKTOS and DCBS KTOS

When a client leaves the program completely, a discharge record should be entered into the PDA program as soon as possible.

- **Note to Recovery KTOS:** *Discharge should be completed when client leaves Phase I. Exclude clients who just move backwards into SOS or MT again. Wait to enter a discharge record when the client actually completes Phase 1 or leaves the Recovery Center.*

To enter discharge data into the PDA program...

- Turn on the PDA and enter your password
- Tap the icon labeled “KTOS”
- If the program icon does not appear on your screen, tap the picture of the house on the bottom left of the screen
- The PDA will display various sets of icons. Tap until you see the icon you need in the menu.
- Tap the Discharge option and enter your responses about the client based on the last meeting you had with him/her.

**Tips for Entering Data**

<table>
<thead>
<tr>
<th>To make a selection...</th>
<th>Tap on the response or on the circle next to the response you wish to select</th>
</tr>
</thead>
<tbody>
<tr>
<td>To enter birth dates or social security numbers</td>
<td>The program will not allow you to move forward unless the correct format is used (i.e., SSN = ###-##-#### or DOB = ##-##-####.</td>
</tr>
<tr>
<td>To put a space between words..</td>
<td>Tap on the ✓ symbol that appears on the number/letter popup keypads</td>
</tr>
<tr>
<td>To bring up a list of answer choices when none appear...</td>
<td>Tap the upside down triangle</td>
</tr>
<tr>
<td>To scroll to the bottom of a list...</td>
<td>Slide the stylus down the right hand side of the screen or tap on the arrows at the ends of the scroll bar.</td>
</tr>
<tr>
<td>To move forward in the program...</td>
<td>Tap NEXT</td>
</tr>
<tr>
<td>To delete a response...</td>
<td>Tap the backward pointing arrow</td>
</tr>
<tr>
<td>To switch between the number and letter keypads...</td>
<td>Tap the letter A or the number 1 on the top of the keypad screen. Make sure the cursor is blinking at the top of the screen after switching.</td>
</tr>
</tbody>
</table>
Exiting the Program

- To leave the program and delete what you have entered so far, tap the word EXIT

- The program saves a record only when you have completed the entire interview and you reach the final screen which states:

  “Thank you for answering these questions. Your information will help improve substance abuse treatment in Kentucky”. For RKTOS - “Thank you for answering these questions. Your information will help improve recovery services in Kentucky.”

- Tap OK to save the survey and go back to the main screen.

Practice Records

- For all practice records use fake clients “John Practice” or “Jane Practice.”
  
  o This way, when these records are HotSynced to UK, they can be deleted from the true client database.
  
  o You may do this anytime want to practice entering a record.

- Have the fake client say “Yes” to the follow-up study so you can view that segment of the data entry too.

- This will give you a chance to see what the format of the program questions look like on the PDA.
PDAs – Common Questions and Troubleshooting

I am on a screen that I don’t recognize. How do I get back to the main menu?

Tap the picture of a house on the bottom left-hand side of the PDA. It will take you back to the main menu where the program icons are located.

You can also check the top right hand corner of the main screen next to the battery. The heading should be “ALL.” You can tap the small black triangle to select “ALL” if it doesn’t appear at first. This should set the PDA to show all your programs on the main PDA screen.

What if I get interrupted while entering data on the PDA?

If you have not been keeping your battery charged, the program will automatically shut down when it gets below 15% battery life and you will lose any unfinished records. To prevent this from happening, make sure your PDA is fully charged before beginning a new record.

Your PDA also shuts off to save battery power if it is not being used. You can set your PDA to turn off after a specific amount of time using the program called “Auto Off”. Tap on the Auto Off icon on the main screen. You can “set” any of the selected time periods as the delay before the PDA will turn off if you are not entering data. It is not recommended to select “Always On” as this could completely drain your battery without you realizing it. Tap the Home button to go back to the main screen. Any changes you selected by tapping “Set” will be saved.

How do I know the PDA is actually charging?

When the PDA is plugged in, turn on the PDA and enter your password. The opening screen will show a lightning bolt at the top center over the battery picture. When the lightning bolt is over the battery, the PDA is charging.

IMPORTANT: If you do not plan to use your PDA for an extended period of time (e.g., a week or more), it is a good idea to leave the PDA plugged into the charger. This will not harm the PDA and it is impossible to over-charge. Even during extended period of non-use, the battery slowly loses its power much like a cell phone.

What is the best way to collect data using the PDA?

- To keep data accurate and consistent, we ask that you simply read each question as it appears on the screen to the client and tap in the client responses.
  - This ensures that every client has been asked the questions in the same manner and that no questions have been skipped.
Sometimes my PDA gets stuck, freezes up, or gives me a blank screen. Is there anything I can do to fix this?

Sometimes the PDA will get stuck or give you a blank screen. Resetting it will help correct this problem. Resetting will NOT erase your data if performed correctly.

**Simple reset**
Take your stylus and tap it in the small reset hole in the bottom back of the PDA. The PDA will restart and everything will be restored. If the simple reset doesn’t correct the problem, try a warm reset.

**Warm reset**
- Press and hold the UP part of the rectangle toggle button on the front bottom of the PDA. Hold only the top part of the button - not the center or sides.
- Continue to hold the toggle button in the UP position while using the stylus to tap the reset hole on the back of your PDA.
- **Do Not Release the UP button until you see the screen light up.**
- If a warm reset does not resolve the problem, please call or email for additional assistance:
  - Jennifer Newell 859-323-4763 jenni.newell@uky.edu
  - Tom Jackson 859-257-9061 tom.jackson@uky.edu

**IMPORTANT REMINDER:** If you reset your PDA using the warm reset option you will also need to go into the PDA and reset:

1. **Date/Time**
   - Tap the “WorldClock” icon
   - Tap on “Set Date & Time” in the bottom left corner
   - Select the correct date and time
   - Tap “Done”
   - Tap the Home button to return to the main menu

2. **FatFinger**
   - Tap the “FatFinger” icon (refers to the big keyboard)
   - Tap “On” in the upper right hand corner
   - Tap the Home button to return to the main menu

3. **Auto Off feature**
   - On the home screen – Tap “AutoOff” icon
   - Use the number keyboard and enter 60 minutes.
   - Tap “set” to select the time
   - Tap the Home button to return to the main menu
HotSyncing Your Data to UK

- Once you have entered records into the PDA program, you need to send or "HotSync" data to the main office at UK-CDAR where the data are saved.

- Try to build HotSyncing into your normal weekly work routine – even if you don’t have records to send to us, we may have program updates to send to you.

- It is a good idea to also HotSync prior to going on vacation or being away for a long weekend.

Modems – Which one do I use?

All data is transmitted to UK CDAR via Bluetooth or Infrared (IR) modems.

The Tungsten E PDA will only use the IR modem, a small gold rectangle box with the word Pegasus on the top. This PDA is used for most KTOS, AKTOS, and DCBS KTOS programs. The Tungsten E2 PDA can use both the IR modem and the Bluetooth modem. Recovery KTOS, KORTOS, and some KTOS/AKTOS PDAs will only use the Bluetooth modem, a silver and black box. The following steps will help you determine which modem your PDA is set up to use.

1. Turn on the PDA and enter your password.
2. Click on the HotSync icon on the main screen.
3. Under the square with the red and blue arrows it will say IR Modem or Bluetooth Modem.
4. If your PDA is set up to use the Bluetooth modem, make sure that the Bluetooth symbol is located on the right side of the battery on the main screen.

Modem Set-up

While the task of hooking up the modem may at first seem daunting, it is a relatively simple process. Make sure you follow the instructions for the type of modem you have in your office.

<table>
<thead>
<tr>
<th>Infrared (IR) Modem Setup</th>
</tr>
</thead>
</table>

1. Make sure the switch on the back of the modem is switched towards “IR”.

2. Plug a splitter into the wall phone outlet then plug the phone line from the back of the modem into the splitter. Plug the phone line from the fax machine into the other side of the splitter. You should now have two phone lines coming from the splitter in the wall, one going to the modem and the other going to the fax machine.

3. Plug your modem into a power outlet. The green power light should come on. Note: The modem (and the green light) will go off after 90 seconds of non-use. You can push the small black “on” button on the front of the modem to turn the modem back on again.

**NOTE:** Setting up the IR Modem with the phone/fax machine running through the splitter allows for the modem and the phone/fax machine to both remain plugged in at all times. However, you cannot transmit data via the modem while the fax machine is receiving/transmitting a fax or the
phone is in use. Likewise, if the modem is in use – someone trying to send a fax or call would get a busy signal.

**Bluetooth Modem Setup**

1. Unplug the fax machine phone line from the wall outlet.

2. Plug the fax machine phone line into the jack on the back of the modem labeled “Phone”.

3. Plug the modem phone line into the jack on the back of the modem labeled “Line” and then plug the other end into the wall outlet. You should now have two phone lines coming from the modem, one going into the wall outlet and the other going into the fax machine.

4. Plug your modem into a power outlet and push the on button marked “SW” on the back of the modem. The red power light should come on.

**NOTE:** Setting up the Bluetooth Modem with the phone/fax machine running through the modem allows for the modem and the phone/fax machine to both remain plugged in at all times. However, you cannot transmit data via the modem while the fax machine is receiving/transmitting a fax or the phone is in use. Likewise, if the modem is in use – someone trying to send a fax or call would get a busy signal.

**How do I sync my data to UK CDAR?**

1. Check your setup and make sure the modem is plugged into a power outlet.
   a. For a Bluetooth modem, push the ON button marked “SW” on the back of the modem. The red power light should light up.
   b. For an IR modem, make sure the green light is on to show the modem is ON. If it’s not, push the small black ON button on the front of the modem.

2. Turn on the PDA and enter your password.

3. Tap on the icon labeled **HotSync** to bring up the HotSync operation screen.

4. **Make sure that the following settings appear on the operation screen:**
   a. The word “Modem” is highlighted (instead of local);
   b. Below the circling arrows picture you see the word “Bluetooth” or “IR Modem” depending on the type of modem you are using; and
   c. The phone number below the HotSync image reads “18663051719” (or 9,18663051719 if you need a “9” to dial out of your phone/fax system)
5. **For Bluetooth modems**, you may be anywhere within approximately 30 feet in order to sync. The modem and PDA do not have to be lined up or facing one another.

6. **For IR modems**, you need to set up the modem and PDA so they are facing one another (about 1½” to 2” apart) on a flat surface. Do not move them during the HotSync as this will interrupt transmission. Though no data will be lost, you will have to start over again.

7. On the center of the HotSync screen, tap the circling arrows picture to start the syncing operation.

8. The PDA will automatically dial the toll-free UK-CDAR office number and send all data from your PDA.

9. You know the transmission is finished when the top of the PDA screen reads: *HotSync operation complete.*
   a. **For IR modems** - Do not move the PDA or modem until you see this screen, as you could interrupt the transmission and have to start over again.

10. Tap the house image to go back to the main screen.

**Modems - Common Questions and Troubleshooting**

*When I try to send records using the modem, I get an error message. What do I do?*

**Error Message: “Modem not Found”**
- Are you using a single analog phone (most likely your fax line)? Multiple lines or digital lines do not transmit data using the modem.
- Is the modem plugged in correctly? Try unhooking the phone cord from the wall – then plugging it back in.
- Is the modem plugged into an a/c adaptor? Is the power button turned on (you should see a green light for IR modem and red light for Bluetooth)?
- When you tap on the HotSync icon (on the PDA) – are your settings correct? Make sure you have the right modem selected (IR Modem or Bluetooth).
- Is Modem highlighted above the circling arrows picture? If not, tap on Modem so that it is.

**Error Message: “Carrier not Found”**
- Are you using a single analog phone (most likely your fax line)? Multiple lines or digital lines do not transmit data.
- Is the phone line plugged into the back of the modem and also attached to the phone jack? Try unhooking the phone cord from the wall – then plugging it back in.
- You may not need a “9” to dial out or you may need to add a “9” to the phone number. Try tapping on the phone number below the HotSync image. Check/uncheck “Dial prefix 9” and sync again to see if that fixed your problem.
Error Message: “Unable to initiate Hotsync operation because the port is in use by another application.”
  o Turn on the PDA, enter your password, and tap on the “Prefs” icon on the main screen.
  o Tap on “Power” under the General heading.
  o Complete a simple reset by poking the reset button on the back of the PDA.
  o Once the PDA turns back on try to HotSync again.
  o Call UK CDAR if you continue to get this error message after the reset.

How often do I need to send records from the PDA to the CDAR office?

You should send the records using the modem and phone line once a week to avoid storing a lot of client records on the PDA at any given time. Overloading the PDA with too much information may slow down the operation of the PDA. Try to pick a day/time when you are typically in the office and build it into your schedule to routinely sync your data.

How do you know whose PDA has synced data?

There is a built in code that transmits the PDA’s I.D. number along with each record so that we can track which PDA sent data. If you have a record that you need to delete or correct, call us and we can modify it for you.

How do I know if the records I entered have been sent from the PDA?

You can check to see that data have been sent by opening the program – the number which appears on the opening screen represents the TOTAL number of baseline and discharge records that are waiting to be sent the next time you HotSync with the modem. On the first screen of the program, the number (#) of records to upload should be 0 after you have synced your PDA. If you have records to upload, there will be a number indicating how many records are on the PDA.

What do I do if I have ANY kind of problem, question, or comment about the PDA programs?

Please remember, No question is too silly. We would much prefer you call us with your problems or questions before you become overly frustrated and/or damage the PDA. You can call or email us and we will do our best to help you as quickly as possible.

UK CDAR STAFF

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