

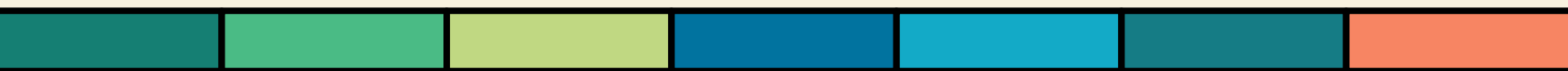


# Kentucky Opiate Replacement Treatment Outcome Study (KORTOS) Client Information System

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REVISED OCTOBER 2023

*A collaboration between the Department for Behavioral Health, Developmental and Intellectual Disabilities, the University of Kentucky Center on Drug and Alcohol Research, and Kentucky Opiate Treatment Programs*

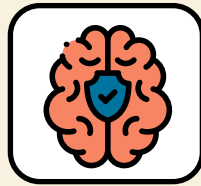


# What is KORTOS?

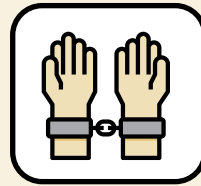
- KORTOS is a research study designed to measure changes for several key risk factors for adults who participate in Kentucky's opiate replacement treatment services using an evidence-based assessment.
- The study helps answer key questions posed by legislators, funding agencies, families, and clients regarding the status of clients 6 months after intake in regards to:



**SUBSTANCE USE**



**MENTAL HEALTH  
PROBLEMS**



**CRIMINAL JUSTICE  
INVOLVEMENT**



**HEALTH**



**VICTIMIZATION AND  
TRAUMA**



**QUALITY OF LIFE**



**EMPLOYMENT**



**RECOVERY  
SUPPORTS**

# Why is Your Program Included?

- The programs included in KORTOS are ones designated to participate by key state stakeholders
- Because the Kentucky legislature is asked to spend money on so many different things, it is important to collect evidence that programs actually achieve desired outcomes.
- Also, it is important to provide timely and accurate information to counter negativity circulating in the media about what happens with clients in opiate replacement treatment programs and to demonstrate the ***positive impact*** your services have on client's recovery.
- **This data collection program will help counteract myths and misinformation. It will provide accurate ways to report Kentucky-specific findings to providers, the public, and to policymakers.**

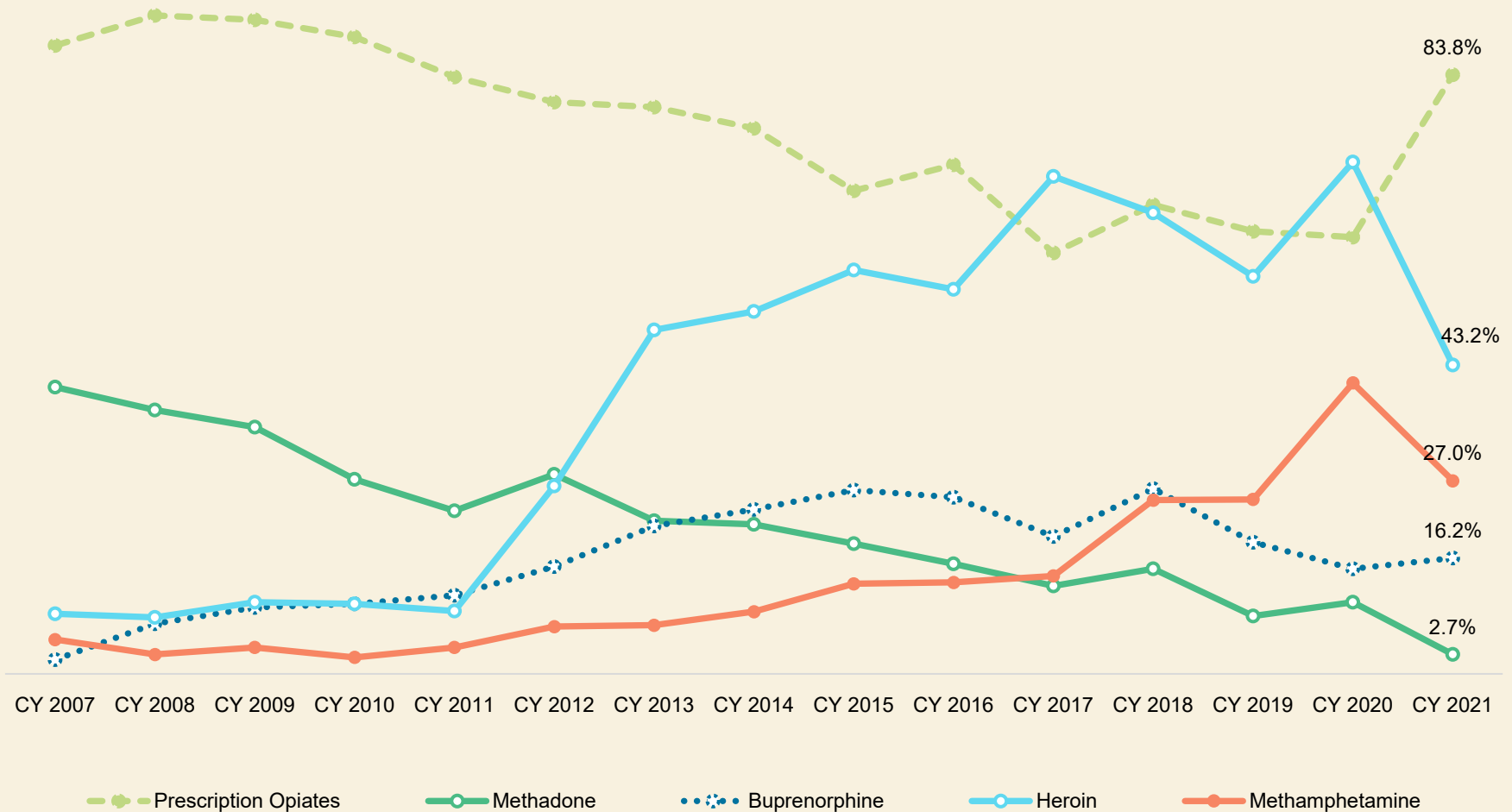


# Why Do This Every Year?

- KORTOS provides up-to-date program-specific and statewide data on substance abuse trends and treatment outcomes.
- Key trends in substance use and policy needs fluctuate annually depending on economic and sociopolitical issues.



# Opioid Drug Use CY2007 - 2021



# Reports and Data Analysis

- Annual reports are developed and published for KORTOS, examining outcomes for the sample of clients who complete a follow-up interview.
- Annual reports, fact sheets, and at-a-glance findings can be downloaded from: <http://cdar.uky.edu/bhos/>.
- Also available from the website are informational materials including:
  - Client consent form
  - Evidence based summary and report
  - PDF-version of intake interview
  - Website training information



# Instrument Development

- KORTOS is a robust, pragmatic, reliable, and valid **evidence-based assessment** developed in Kentucky for Kentucky.
- The instrument is made up of **five core components** each with strong reliability and validity research support and three supplemental components, most of which have strong reliability and validity research support.
- KORTOS focuses on **dynamic or changeable factors** that are **sensitive to individual-level change over** time allowing recovery outcomes to be measured
- KORTOS is appropriate for the **context of Kentucky** and includes measures that consider the unique features of Kentucky and of opioid treatment programs



# Kentucky in Context

Although Kentucky is represented in a few national datasets, those national studies do not provide the state, county - and regional - level data and those national surveys do not consider or account for Kentucky's unique cultural context.

**2ND HIGHEST**  
IN THE NATION FOR



**DRUG DEATHS**

**4TH HIGHEST**  
IN THE NATION FOR



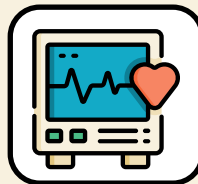
**WORST MENTAL  
HEALTH**

**5TH HIGHEST**  
IN THE NATION FOR



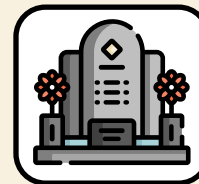
**SMOKING**

**2ND HIGHEST**  
IN THE NATION FOR



**MULTIPLE CHRONIC  
HEALTH CONDITIONS**

**4TH HIGHEST**  
IN THE NATION FOR



**PREMATURE  
DEATH**

**8TH HIGHEST**  
IN THE NATION FOR



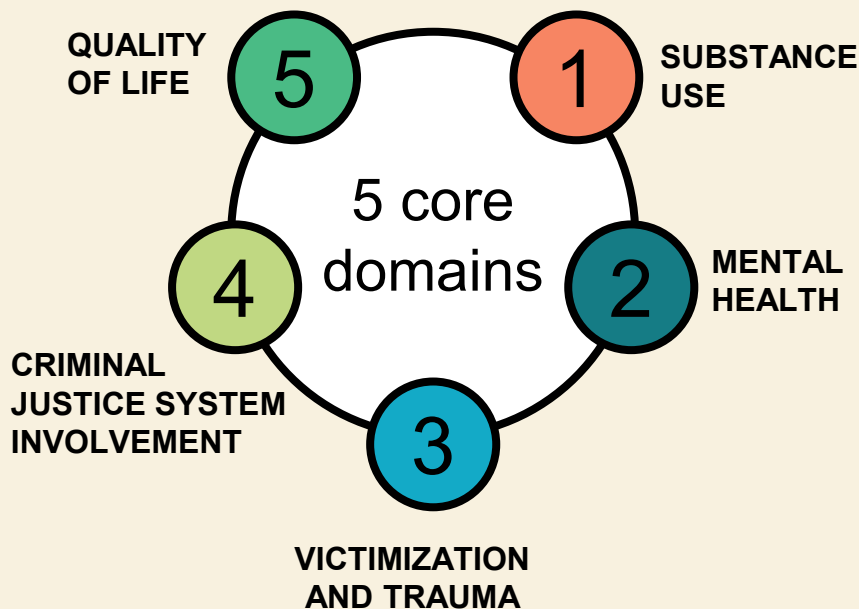
**FOOD INSECURITY**

Source: America's Health Rankings Annual Report, 2022; U.S. News and World Reports. (May 4, 2023) *The States with the Worst Mental Health*.

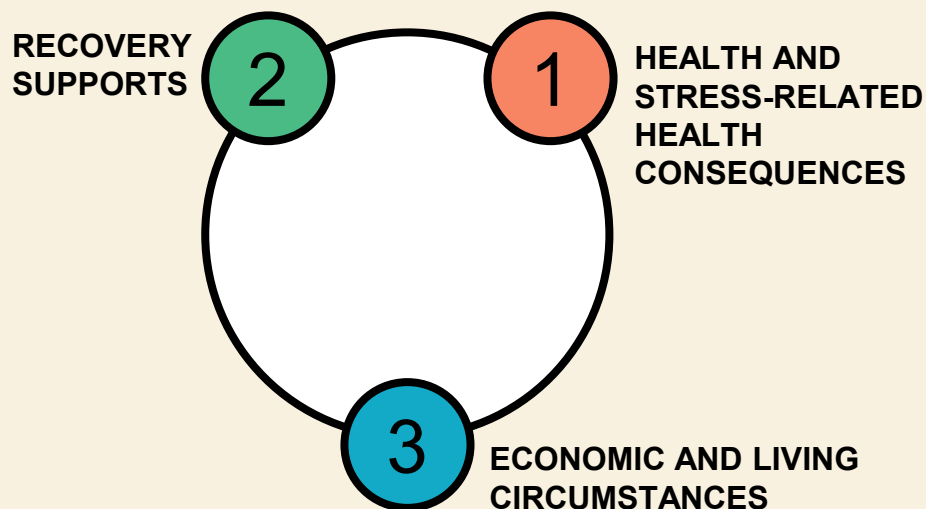


# Intake Interview Data: Key Elements

The interview takes about 30 minutes and focuses on **five core domains**:



And **three supplemental domains**:



**Best Practice:** In-person interviews to gather information and to ensure client-focused clarifications or questions can be made.



# KORTOS has Two Components

1

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## INTAKE INTERVIEWS

Should be completed at your agency with each new client once the client has completed treatment intake.

At this time clients are asked if UK CDAR can contact them for a follow-up interview.

2

---

## FOLLOW-UP INTERVIEWS

Contact with those who agreed and who agree to do the survey.

Completed by UK CDAR via telephone about 6 months after intake. Both clients who are, and who are not still involved in the program are interviewed so we can better understand risk and protective factors associated with current status.



# Intake Interview

- Program staff/clinicians complete the Intake Interview with:
  - All new program clients
- Intake interviews must be completed as soon as possible after the program intake is completed to accurately represent the client's situation and behavior before receiving treatment.
- Intake data is considered program data (rather than research data) as designated by the state.
- There is **NO compensation** and **NO research consent forms** for *intake interviews* since the interview is considered part of intake into treatment.



# Intake Interviews

## Best Practice for Conducting the Intake Interview

- The clinician uses the secure, online Client Information System to guide the interview with the client
  - Efficient: Allows for simultaneous data collection and data entry

## Alternative Practice

- If the clinician does not have online access at the time of the interview (e.g., no Wifi), the clinician can download the Intake Interview PDF before the interview from <http://cdar.uky.edu/kortos/> and complete the interview on the paper copy
- Will need to enter the information from the paper copy into the online Client Information System within 7 days



# Follow-up Interviews

- At the end of the intake interview, clients are asked to volunteer for the follow-up part of the study which consists of a 15 minute telephone interview about 6 months later.
  - This is the “research” part of the study. Client participation is completely **voluntary**. There is **compensation** and a **consent form** for the follow-up interview.
  - Clients give their consent to participate using an electronic consent form on the web survey, which is approved by the UK Medical Institutional Review Board (IRB).
  - Questions on the follow-up interview are very similar to the questions on the intake interview;
    - ❖ The follow-up survey is shorter than the intake survey (experiences that clients have ever had are not re-asked such as the Adverse Childhood Experiences or lifetime treatment episodes)

# Follow-Up Interviews

- UK CDAR staff contact clients for the “UK Health Follow-up Study” to see how they are doing 6 months after starting treatment.
  - No information is revealed about the client as UK tries to reach individuals for the interview. We do not tell anyone that the client was in treatment. It is just referred to as the **UK Health Follow-up Study**.
  - Those clients who **volunteer and complete the follow-up interview** are paid \$20 by check from UK.



# Follow-up Interview

- Follow-up staff inform clients that **they operate independently from the treatment program**.
  - Lack of affiliation with the interviewers ensures more accurate reporting.
- Staff are highly trained and monitored on an ongoing basis by Dr. Logan.
- The follow-up study is **voluntary** but it is important to include as many individuals as possible.
  - Every client's treatment experience is unique and important to be included in the study, and the interviewers invest substantial time and effort to reach every client who agrees to participate and who was selected for the study.
  - Upon making contact with the client, **the interviewers will go through the informed consent process with the client a second time**, making sure that they still want to participate in the study.



# Follow-up Interview: Protections

- **Confidentiality protections**

- The study is approved by the UK Human Subjects Review Board and the Cabinet for Health and Family Services Human Subjects Review Board.
- All responses to the follow-up interview are separated in the database from client identifiers and are secured and encrypted.
- A **Federal Certificate of Confidentiality** ensures identifying information about clients can never be revealed, even under a subpoena. The data are secure and confidential.





# Contact Information for the Follow-Up Interview

- If the client wants to participate in the follow-up, it is VERY important to:
  - Accurately record maiden names/nicknames for client as well as an address where they receive mail, a home or cell phone number they can be reached on, and an email address.
  - Accurately record names, addresses, home and cell phone numbers, email addresses, and relationship to client for at least one and preferably two contacts.
  - Female relative usually knows where the client is
    - ❖ **Be sure to let clients know that contacts are only made with these individuals as a way to locate the client, not to discuss any aspect of the survey or program.**
- As of 2019, new security questions have been added to allow interviewers to confirm the client's identity multiple ways at follow-up.



# Completing the Intake Interview Process

- Once the contact information has been entered, click “submit” to save the interview
- If consent is not given, mark the appropriate response and click “next”.
- ***Remember, the survey will only be saved and submitted if the “Submit” button is clicked at the conclusion of the interview.***



# KORTOS Client Information System

Intake Interview data is entered into the secure Client Information System (CIS) website: <https://ukcdar.uky.edu/kortos>

## Program Director or Administrator Access

- For administrator log-in and password contact Jeb Messer (859-257-1400 or [jeb.messer@uky.edu](mailto:jeb.messer@uky.edu))

## Clinician or Staff Access

- A. Contact your Program Director who will assign you a user ID and password for your OTP site
- B. With your password/login ID you can now view the KORTOS Client Information System at <https://ukcdar.uky.edu/KORTOS>
- C. Log-in and add/view/edit clients and enter new intake interviews



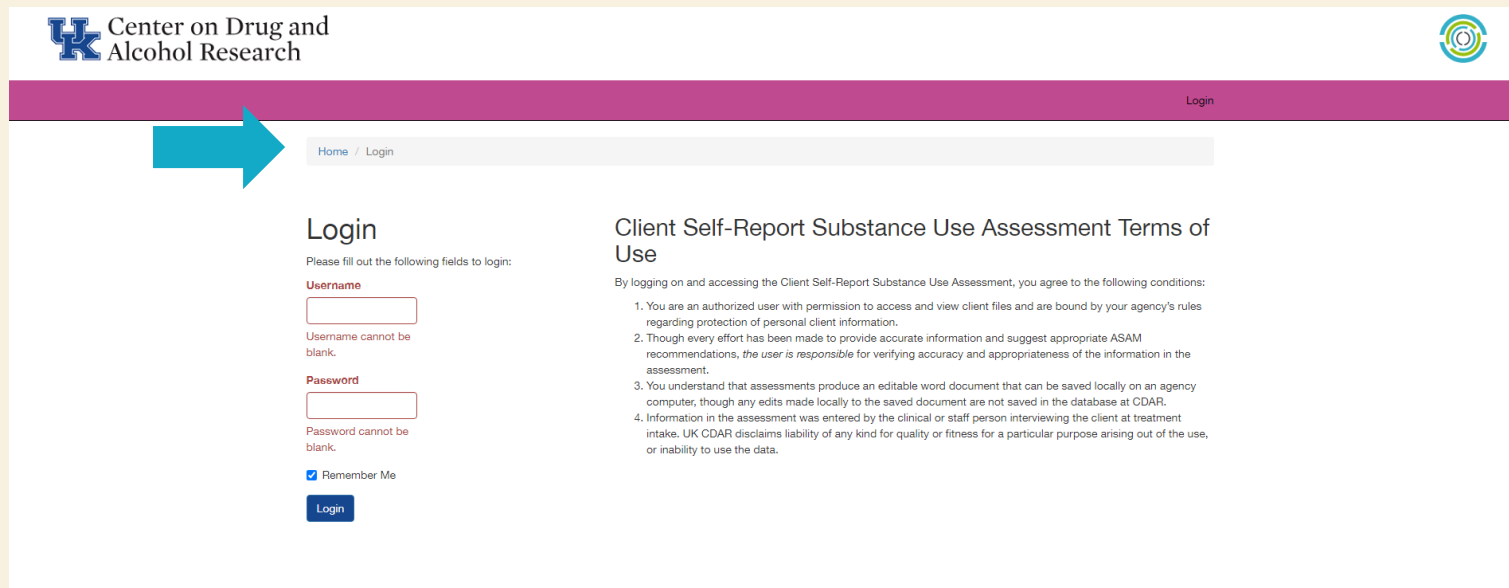
# KORTOS Client Information System Overview

- The next group of slides provides an overview of the KORTOS Client Information System (CIS) and the Client Narrative Report.
- **This part of the presentation will show you:**
  - How to acquire an ID and password for the Client Information System
  - How to enter a KORTOS Intake Interview for a client
  - How to use unique features in the KORTOS Client Information System tailored for MAT programs
  - How to download and save KORTOS Client Narrative Report
  - How site administrators can use management features of the System



# Logging In


- The KORTOS Client Information System requires users to have a **unique case-sensitive ID** and **password** assigned to you by your Program Director or supervisor.
- Unique passwords are used to protect security and privacy. Staff can only see their clients if they have their own password and login.
- Once you have your ID and password, you can login at <https://ukcdar.uky.edu/KORTOS>




The screenshot shows the login interface for the KORTOS system. At the top left is the logo for the Center on Drug and Alcohol Research (UK). At the top right is a circular logo with the letters 'CDAR'. A purple navigation bar contains a 'Login' link. Below this bar is a breadcrumb trail: 'Home / Login'. A large blue arrow points to the 'Login' link in the breadcrumb. The main content area is divided into two columns. The left column is titled 'Login' and contains the text 'Please fill out the following fields to login:'. Below this are two input fields: 'Username' and 'Password'. The 'Username' field has a red border and the text 'Username cannot be blank.' below it. The 'Password' field has a red border and the text 'Password cannot be blank.' below it. Below the password field is a checkbox labeled 'Remember Me' which is checked. At the bottom of the left column is a blue 'Login' button. The right column is titled 'Client Self-Report Substance Use Assessment Terms of Use'. Below the title is the text 'By logging on and accessing the Client Self-Report Substance Use Assessment, you agree to the following conditions:'. Below this is a list of four conditions: 1. You are an authorized user with permission to access and view client files and are bound by your agency's rules regarding protection of personal client information. 2. Though every effort has been made to provide accurate information and suggest appropriate ASAM recommendations, the user is responsible for verifying accuracy and appropriateness of the information in the assessment. 3. You understand that assessments produce an editable word document that can be saved locally on an agency computer, though any edits made locally to the saved document are not saved in the database at CDAR. 4. Information in the assessment was entered by the clinical or staff person interviewing the client at treatment intake. UK CDAR disclaims liability of any kind for quality or fitness for a particular purpose arising out of the use, or inability to use the data.

# Terms of Use

By logging into the Client Information System, you agree to the Terms of Use for the system. These terms describe who is allowed to use the system and highlight that the Client-Self Report Assessment is based on user entered information.



Center on Drug and  
Alcohol Research



Login

[Home](#) / [Login](#)

## Login

Please fill out the following fields to login:

**Username**

Username cannot be blank.

**Password**

Password cannot be blank.

☒ Remember Me

## Client Self-Report Substance Use Assessment Terms of Use

By logging on and accessing the Client Self-Report Substance Use Assessment, you agree to the following conditions:

1. You are an authorized user with permission to access and view client files and are bound by your agency's rules regarding protection of personal client information.
2. Though every effort has been made to provide accurate information and suggest appropriate ASAM recommendations, *the user is responsible for verifying accuracy and appropriateness of the information in the assessment.*
3. You understand that assessments produce an editable word document that can be saved locally on an agency computer, though any edits made locally to the saved document are not saved in the database at CDAR.
4. Information in the assessment was entered by the clinical or staff person interviewing the client at treatment intake. UK CDAR disclaims liability of any kind for quality or fitness for a particular purpose arising out of the use, or inability to use the data.

# Home Screen

After logging into the Client Information System, the user is presented with the Home Screen. From this location, you are provided links to useful areas of the website and **notifications and alerts** in the green box on the right-hand side of the page.

**UK**  
UNIVERSITY OF  
**KENTUCKY**  
Center on Drug and  
Alcohol Research

KORTOS  
Client Information System

Client List Create New Client Mid-Level Report User Management Account Settings Admin Logout (jjmiller)

**Clients**

- [Client List](#)
- [Create A New Client](#)

**Project Resources**

- [PDF Interview](#)
- [Consent Form](#)
- [More Information](#)

**Notifications & System Upgrades Complete**

Published Date: 01/30/2015

Scheduled upgrades to the KORTOS system have been completed. You may now login and complete intakes and discharges for your clients. Surveys can now be saved and resumed at a later time.

If you have any questions about the new features, please contact Jeb Messer at 859.257.1400 or [jeb.messer@uky.edu](mailto:jeb.messer@uky.edu).

This website was developed by the University of Kentucky Center on Drug and Alcohol Research.  
For questions or support contact Jeb Messer ([jeb.messer@uky.edu](mailto:jeb.messer@uky.edu), 859 257-1400)

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CDAR Records  
Display Platform®

# Home Screen

From the Home Screen, you can **Create a New Client** by clicking on the link across the top or clicking the link under “clients” in the list on the left side of the page. You can also view the **Client List**.

**UK**  
UNIVERSITY OF  
**KENTUCKY**  
Center on Drug and  
Alcohol Research

KORTOS  
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Client List Create New Client Mid-Level Report User Management Account Settings Admin Logout (jmillier)

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CDAR Records  
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# Client List View

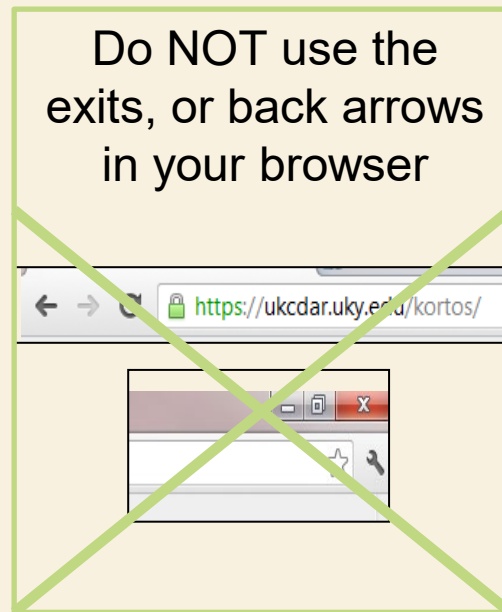
When viewing the **Client List**, you'll be able to:

1. **Create New Clients**
2. **Submit a baseline**
3. **View a Report** after a baseline has been entered

The screenshot displays the KORTOS Client Information System interface. At the top left is the University of Kentucky logo with the text "KORTOS Client Information System". A navigation bar contains links: "Client List", "Create New Client" (highlighted with a red box and a blue arrow), "Mid-Level Report", "User Management", "Account Settings", "Admin", and "Logout (jmillier)". Below the navigation bar is a breadcrumb trail: "Home » Client List". The main heading is "All Clients". A search instruction block states: "In any of the filter fields below, type in a whole or partial value and hit ENTER to search. Erasing the text in the field and hitting ENTER will reset the search. Use the Advanced Search to search on more than one field at a time. Click on a column title to toggle ascending & descending sorting." Below this are links for "Advanced Search", "Clients Needing Intake Interview", "Active Clients", "Discharged Clients", and "Unassigned Clients". A search filter section includes input fields for "First Name", "Last Name", and "SSN", a "Site" dropdown menu, and a "Clients Assigned to Clinician" dropdown menu set to "All Clinicians". At the bottom of the filter section are "Search" and "Clear Filters" buttons. Three colored arrows (blue, green, and purple) point upwards towards the search filter fields.

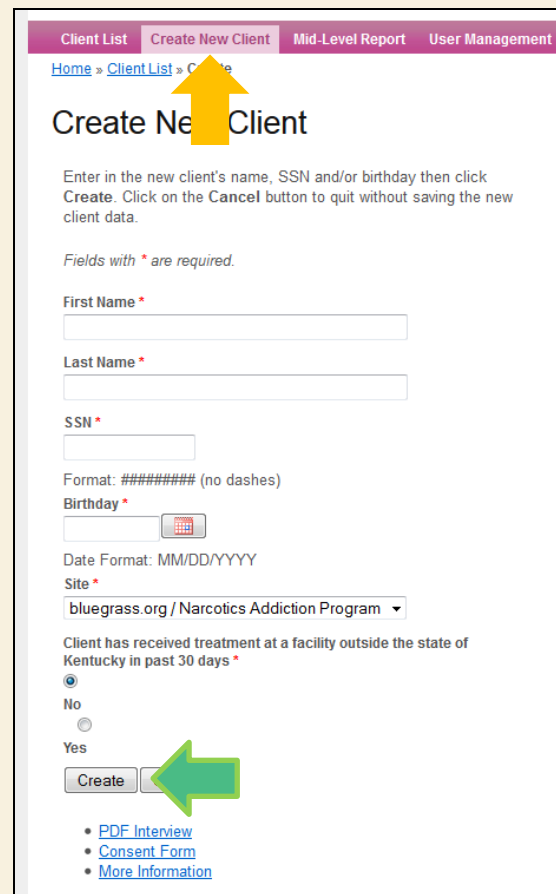
# Client Information System Navigation Tips

Use the buttons and links within the Information Screen to move between client lists, to create new clients, and to view or search for information.



# Create New Client to Start a KORTOS Record

- To be able to enter a KORTOS Intake Interview, you first create a record in the system for the client.
- From the Home Screen, select **Create New Client**.
- Enter the client's first and last name, social security number, and birthday.
- The OTP site should already be displayed based on your log-in information.
- Click **Create**.



The screenshot shows the 'Create New Client' web form. At the top, there is a navigation bar with links: 'Client List', 'Create New Client', 'Mid-Level Report', and 'User Management'. Below this, a breadcrumb trail reads 'Home > Client List > Create New Client'. A yellow arrow points to the 'Create New Client' link in the breadcrumb. The main heading is 'Create New Client'. Below it, instructions state: 'Enter in the new client's name, SSN and/or birthday then click Create. Click on the Cancel button to quit without saving the new client data.' A note indicates 'Fields with \* are required.' The form contains several input fields: 'First Name \*', 'Last Name \*', and 'SSN \*'. Below the SSN field, the format is specified as 'Format: ##### (no dashes)'. The 'Birthday \*' field is accompanied by a calendar icon and the instruction 'Date Format: MM/DD/YYYY'. A 'Site \*' dropdown menu is set to 'bluegrass.org / Narcotics Addiction Program'. A checkbox section asks 'Client has received treatment at a facility outside the state of Kentucky in past 30 days \*', with 'No' selected. At the bottom, there is a 'Create' button and a green arrow pointing to it. Below the button are three links: 'PDF Interview', 'Consent Form', and 'More Information'.

# Refreshing the Browser – Client List

If you don't see a recently added client in the client list. Select the refresh button on your browser. The images below show three different browser examples.

The **blue** arrow is a **Google Chrome** browser.

The **orange** arrow is an **Internet Explorer** browser.

The **green** arrow is a **Firefox** browser.

*\*\*\*If you still do not see the client on your list, please contact CDAR. Do not reenter the data. CDAR contact information is located on the Login page.\*\*\**



# Enter a New KORTOS Intake Interview

- To start the KORTOS Intake Interview, click on the link for Submit Baseline from the Client History screen or by selecting the **Submit Baseline** link by a client on the client list.
- At the end of the interview, you can click a link for **KORTOS Client Information System** to return you to the Client Information System.

**Clients Needing Intake Interview**

In any of the filter fields below, type in a whole or partial value and hit ENTER to search.  
Erasing the text in the field and hitting ENTER will reset the search.  
Use the Advanced Search to search on more than one field at a time.  
Click on a column title to toggle ascending & descending sorting.

[Advanced Search](#) [Active Clients](#) [All Clients](#) [Discharged Clients](#) [Unassigned Clients](#)

First Name

Last Name

SSN

Site

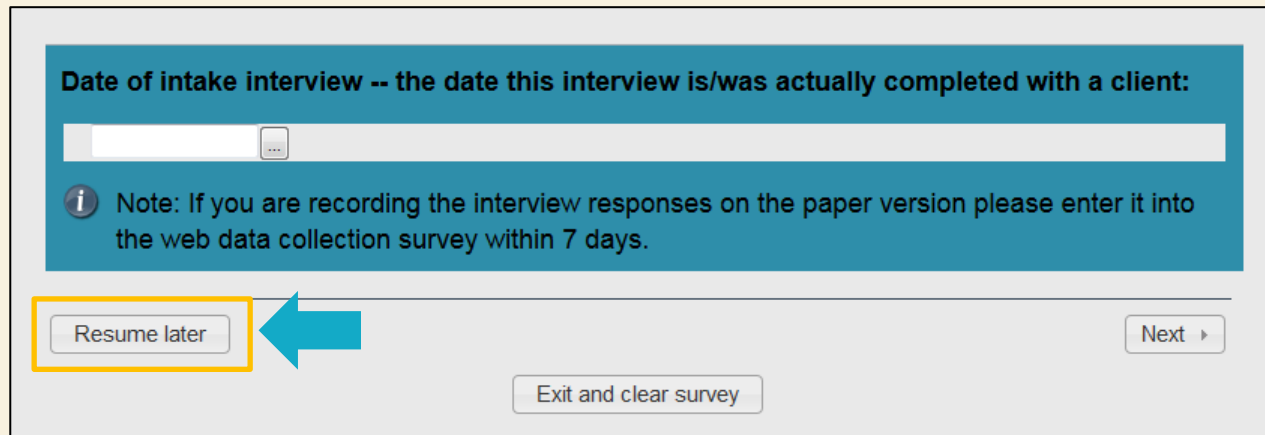
Clients Assigned to Clinician

[Clear Filters](#) Displaying 1-9 of 9 result(s).

Record Create Date	First Name	Last Name	SSN	Birthday	Site	Active	Action
<input type="text"/> <input type="button" value="Calendar"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="button" value="Calendar"/>	<input type="text" value="Paducah"/>	<input type="text"/>	
To <input type="text"/> <input type="button" value="Calendar"/>							
02/02/2015	<a href="#">Ben</a>	<a href="#">Bishop</a>	123456789	11/21/1986	Paducah Professional Associates	✓	<a href="#">Resume Saved Intake Interview</a> <input type="button" value="Print"/> <input type="button" value="Delete"/>
02/02/2015	<a href="#">Ryan</a>	<a href="#">Callahan</a>	333445555	03/21/1985	Paducah Professional Associates	✓	<a href="#">Enter Intake Interview</a> <input type="button" value="Print"/> <input type="button" value="Delete"/>


# Resuming an Interview Later


- At the bottom-left of each interview question page, you will see a button to **Resume later**. Clicking this button will save all of the interview responses up to that point.
- You may return to an incomplete intake and complete it within 14 days of when you chose to resume later. After 14 days, the interview will no longer be saved and you will need to begin the interview from the beginning with the client.



**Date of intake interview -- the date this interview is/was actually completed with a client:**

**Note:** If you are recording the interview responses on the paper version please enter it into the web data collection survey within 7 days.

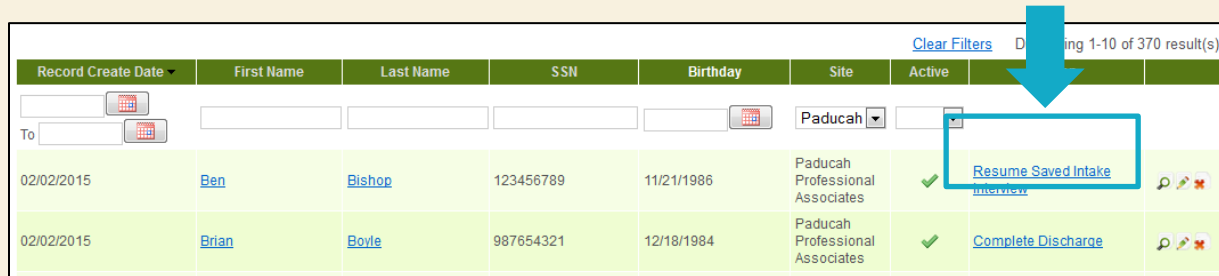
**Resume later** 

**Next** 

**Exit and clear survey**

# Home Screen – Resuming an Interview

- When an Intake interview has been saved, you can return to the survey by searching the client in the Client List. Clicking **Resume Baseline** will take you to the place you left off.

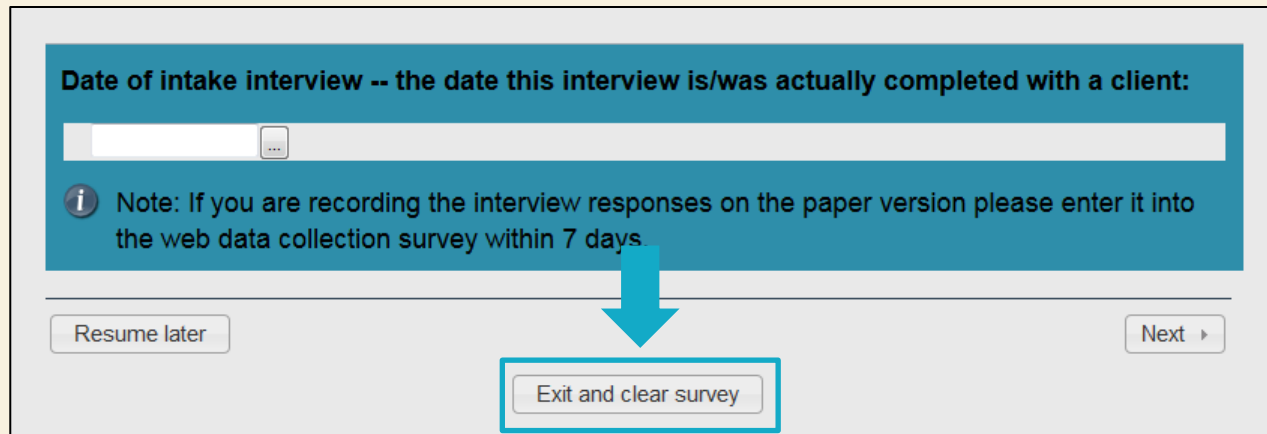


The screenshot shows a web application interface for a client list. At the top right, there is a link for 'Clear Filters' and a status indicator 'Displaying 1-10 of 370 result(s)'. Below this is a table with columns: Record Create Date, First Name, Last Name, SSN, Birthday, Site, Active, and an unlabeled column for actions. The first two rows of data are visible. The first row shows a record for 'Ben Bishop' with SSN 123456789, born 11/21/1986, at 'Paducah Professional Associates', which is 'Active'. A blue box highlights the link 'Resume Saved Intake Interview' in the action column, with a large blue arrow pointing down to it from above. The second row shows a record for 'Brian Boyle' with SSN 987654321, born 12/18/1984, at 'Paducah Professional Associates', which is also 'Active'. The action column for this row contains the link 'Complete Discharge'.

Record Create Date	First Name	Last Name	SSN	Birthday	Site	Active	
02/02/2015	<a href="#">Ben</a>	<a href="#">Bishop</a>	123456789	11/21/1986	Paducah Professional Associates	✓	<a href="#">Resume Saved Intake Interview</a>
02/02/2015	<a href="#">Brian</a>	<a href="#">Boyle</a>	987654321	12/18/1984	Paducah Professional Associates	✓	<a href="#">Complete Discharge</a>

# Exit and Clear Survey

- If you have started entering an Intake in error or would like to delete all of the client's responses and start over, you can click **Exit and Clear Survey** at any time.



The screenshot shows a survey interface with a blue header bar containing the text: "Date of intake interview -- the date this interview is/was actually completed with a client:". Below this is a date input field. A note with an information icon (i) states: "Note: If you are recording the interview responses on the paper version please enter it into the web data collection survey within 7 days." Below the note, there are three buttons: "Resume later" on the left, "Exit and clear survey" in the center (highlighted with a red box), and "Next >" on the right. A large red arrow points from the note down to the "Exit and clear survey" button.

Use this button **only** if you would like to wipe out all the data you have entered thus far, either because you were entering data in error or a practice record.



# Home Screen – Search by Name, SSN, or DOB

To **search** the system for a specific client, enter a first or last name, a SSN, or birthday and hit enter on your keyboard. You can also search for partial names or SSNs but you need a minimum of one letter in whatever field you want to search.

The screenshot shows a web application interface for managing clients. At the top is a navigation bar with links: Client List, Create New Client, Mid-Level Report, User Management, Account Settings, Admin, and Logout (jimiller). Below this is a breadcrumb trail: Home > Client List. The main heading is "All Clients". A paragraph of instructions follows: "In any of the filter fields below, type in a whole or partial value and hit ENTER to search. Erasing the text in the field and hitting ENTER will reset the search. Use the Advanced Search to search on more than one field at a time. Click on a column title to toggle ascending & descending sorting." Below the instructions are several filter links: Advanced Search, Clients Needing Intake Interview, Active Clients, Discharged Clients, and Unassigned Clients. The search area is a light green box containing input fields for First Name, Last Name, SSN, and Site (a dropdown menu). There is also a dropdown for "Clients Assigned to Clinician" set to "All Clinicians". At the bottom of this box are "Search" and "Clear Filters" buttons. A large blue arrow points from the "Search" button towards the right. Below the search area is a table header with columns: Record Create Date, First Name, Last Name, SSN, Birthday, Site, Active, and Action. Below the header are input fields for filtering the table, including a date range (To) and dropdown menus for Site and Active status. A "Clear Filters" link and "Displaying 1-10 of 7477" text are also present.

Client List Create New Client Mid-Level Report User Management Account Settings Admin Logout (jimiller)

Home > Client List

## All Clients

In any of the filter fields below, type in a whole or partial value and hit ENTER to search.  
Erasing the text in the field and hitting ENTER will reset the search.  
Use the Advanced Search to search on more than one field at a time.  
Click on a column title to toggle ascending & descending sorting.

[Advanced Search](#) [Clients Needing Intake Interview](#) [Active Clients](#) [Discharged Clients](#) [Unassigned Clients](#)

First Name

Last Name

SSN

Site

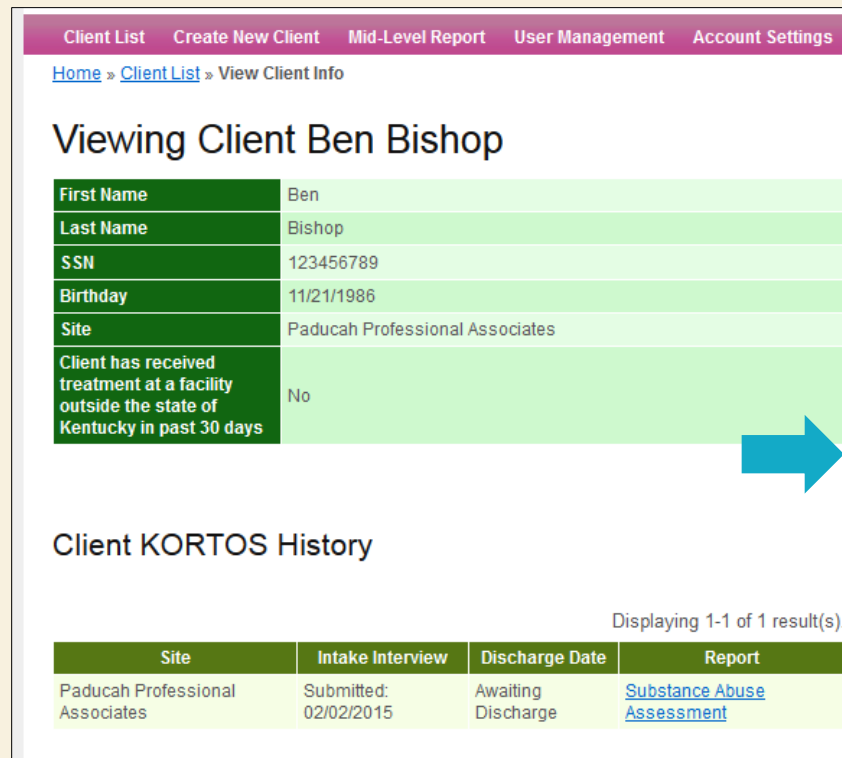
Clients Assigned to Clinician

[Clear Filters](#) Displaying 1-10 of 7477

Record Create Date	First Name	Last Name	SSN	Birthday	Site	Active	Action
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
To <input type="text"/>				<input type="text"/>	<input type="text"/>	<input type="text"/>	

# View a Client Self-Report Substance Abuse Assessment

- The KORTOS Client Self-Report Substance Abuse Assessment will be available for each client who has completed a baseline assessment.
- Assessments can be used as the foundation of your psychosocial.
- To view the Assessment, select your client from the client list and click on the **View Report** link.

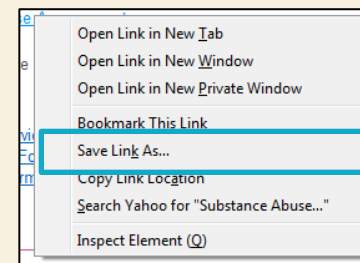
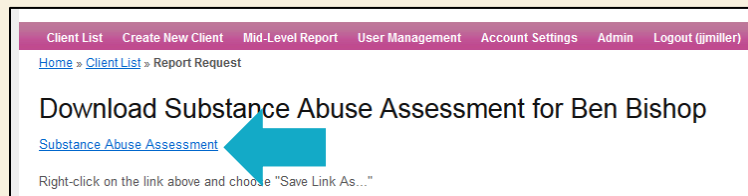
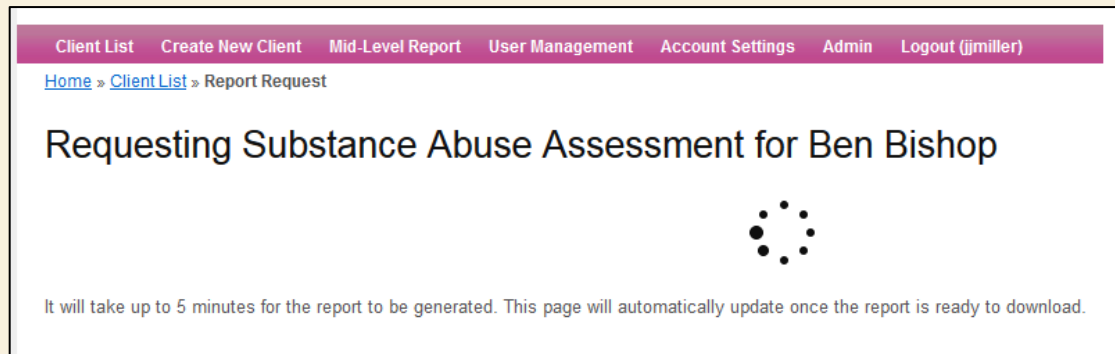


The screenshot displays the KORTOS system interface. At the top is a navigation bar with links: Client List, Create New Client, Mid-Level Report, User Management, and Account Settings. Below this is a breadcrumb trail: Home » Client List » View Client Info. The main heading is "Viewing Client Ben Bishop". A table lists client details: First Name (Ben), Last Name (Bishop), SSN (123456789), Birthday (11/21/1986), Site (Paducah Professional Associates), and a question about treatment at a facility outside Kentucky (No). A large blue arrow points from the "No" answer to the "Client KORTOS History" section. This section shows "Displaying 1-1 of 1 result(s)." and a table with columns: Site, Intake Interview, Discharge Date, and Report. The table contains one entry for Paducah Professional Associates, with a link to the "Substance Abuse Assessment" report.

Client List	Create New Client	Mid-Level Report	User Management	Account Settings
Home » Client List » View Client Info				
Viewing Client Ben Bishop				
First Name	Ben			
Last Name	Bishop			
SSN	123456789			
Birthday	11/21/1986			
Site	Paducah Professional Associates			
Client has received treatment at a facility outside the state of Kentucky in past 30 days	No			
Client KORTOS History				
Displaying 1-1 of 1 result(s).				
Site	Intake Interview	Discharge Date	Report	
Paducah Professional Associates	Submitted: 02/02/2015	Awaiting Discharge	<a href="#">Substance Abuse Assessment</a>	

# Save and Edit KORTOS Client Narrative Report

- After the report generation has completed, a link will appear titled **KORTOS Baseline Narrative Report**. To save this file to your computer, right click on the link and choose “Save link as...” or “Save target as...” and select a location on your computer to save the file. Now you may edit it to meet your agency’s needs to use as part of your psychosocial for the client.





# **Supervisor**

# **Reporting Elements**



# Mid-Level Reporting

From the home screen, you can view Mid-Level Reports by clicking on the Actions tab and selecting **Mid-Level Reports** from the drop down.

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Client Information System

Client List Create New Client **Mid-Level Report** User Management Account Settings Admin Logout (jjmiller)

[Home](#) » Mid Level Reports

## Mid-Level Reporting

Select a date range to see completed assessments within that time frame.

Start: 11/04/2014 End: 02/02/2015 Search via specified date range Last 30 days Last 90 days Last 180 days

Total 16 result(s).

Region Name	Clients Entered	Intakes Submitted	Discharges Submitted
<a href="#">Behavioral Health Group</a>	0	0 (Completed: 0, Non-Completed: 0)	0
<a href="#">bluegrass.org / Narcotics Addiction Program</a>	11	11 (Completed: 10, Non-Completed: 1)	8
<a href="#">Center for Behavioral Health - Bowling Green</a>	0	0 (Completed: 0, Non-Completed: 0)	0

# Site Administrator Options – Home Screen

- When you log in as Site Administrator, the same home screen displays for the site.
- You can perform the same functions from the client lists as described in the training for clinicians.
- In addition, there are several administrative functions which can be accessed and performed from this screen.

The screenshot displays the KORTOS Client Information System interface. At the top left is the University of Kentucky logo, and to its right is the text 'KORTOS Client Information System' and 'Center on Drug and Alcohol Research'. A purple navigation bar contains links: 'Client List', 'Create New Client', 'Mid-Level Report', 'User Management', 'Account Settings', 'Admin', and 'Logout (jjmiller)'. Below the navigation bar, a breadcrumb trail shows 'Home > Client List'. The main heading is 'All Clients', with a yellow arrow pointing to it. Below the heading is instructional text about filtering and searching. A row of links includes 'Advanced Search', 'Clients Needing Intake Interview', 'Active Clients', 'Discharged Clients', and 'Unassigned Clients'. A light green search box contains four input fields: 'First Name', 'Last Name', 'SSN', and 'Site'. A purple arrow points to the 'Last Name' field. Below these fields is a dropdown for 'Clients Assigned to Clinician' set to 'All Clinicians'. At the bottom of the search box are 'Search' and 'Clear Filters' buttons.

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Client Information System

Client List Create New Client Mid-Level Report User Management Account Settings Admin Logout (jjmiller)

Home > Client List

## All Clients

In any of the filter fields below, type in a whole or partial value and hit ENTER to search.  
Erasing the text in the field and hitting ENTER will reset the search.  
Use the Advanced Search to search on more than one field at a time.  
Click on a column title to toggle ascending & descending sorting.

[Advanced Search](#) [Clients Needing Intake Interview](#) [Active Clients](#) [Discharged Clients](#) [Unassigned Clients](#)

First Name

Last Name

SSN

Site

Clients Assigned to Clinician

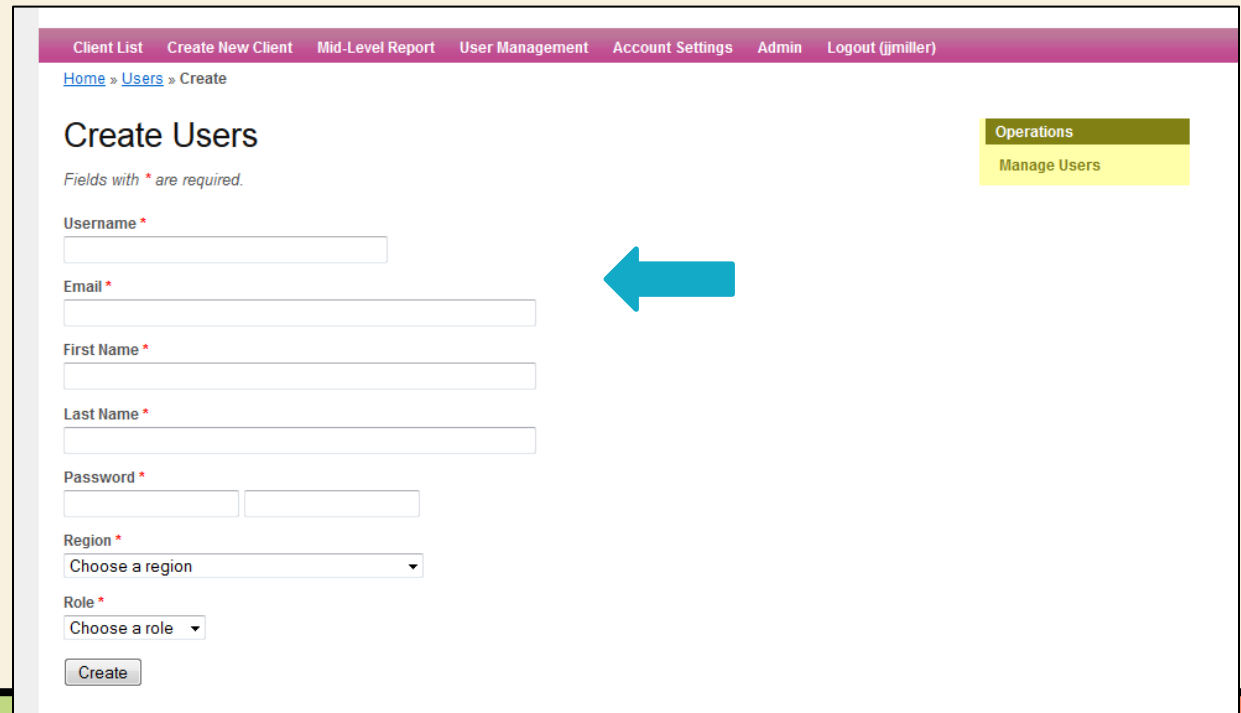
# User Management

- Clicking on the **User Management** tab at the top of the screen brings up the current list of authorized users for the site. The list includes all clinicians and administrators.
- If you need to create a new user for the system, this is where you would go.



# User Management – Create New Users

- When you click on User Management, you will see the screen below. To add a user to the system, click **Create User**.
- This will bring you to a new screen. Be sure to fill out all fields before hitting create at the bottom
- User name should be First Initial and Last name with no spaces, and passwords should be at least 8 characters with some mixture of capital and lower case letters (they are case sensitive!). **We highly recommend using a random password generator for maximum security.** [www.freepasswordgenerator.com](http://www.freepasswordgenerator.com) is a reliable source.



The screenshot shows a web application interface for creating new users. At the top, a purple navigation bar contains links: Client List, Create New Client, Mid-Level Report, User Management, Account Settings, Admin, and Logout (jmilller). Below the navigation bar, a breadcrumb trail reads 'Home > Users > Create'. The main heading is 'Create Users'. A note states 'Fields with \* are required.' The form includes the following fields: 'Username \*' (text input), 'Email \*' (text input, highlighted by a blue arrow), 'First Name \*' (text input), 'Last Name \*' (text input), 'Password \*' (two text inputs for password and confirmation), 'Region \*' (dropdown menu with 'Choose a region' selected), and 'Role \*' (dropdown menu with 'Choose a role' selected). A 'Create' button is located at the bottom left. On the right side, there is a sidebar with two buttons: 'Operations' (green) and 'Manage Users' (yellow).



# User Management – Deleting Users

- To delete a current user (as in the case of a staff resignation), locate the desired clinician from the user list displayed under the User Management tab and click on the **Delete** button.
- The system will not ask you if you are sure you want to delete so it is important to confirm you have selected the correct user before clicking the delete button.
- This will remove this user from the system and move all clients for whom they were the sole clinician responsible to the Unassigned Clients list on the home screen.

Client List Create New Client Mid-Level Report User Management Account Settings Admin Logout (jjmiller)

Home > Users > testclinic3

### Viewing User testclinic3

Username	testclinic3
Email	test3@test.me
First Name	Clinic
Last Name	Tester 3
Region	No Region
Role	Clinician

**Operations**

- Create User
- Update User
- Delete User
- Manage Users

# Client Management – Reviewing Client Status by Clinician

- From the Client List there is the option to **search by assessor** from a drop down list. Clicking on the name of the clinician whose cases you want to review/manage will display the list of their clients only.

The screenshot displays the KORTOS Client Information System interface. At the top, the University of Kentucky logo and 'KORTOS Client Information System' are visible. A navigation bar includes links like 'Client List', 'Create New Client', and 'Logout (jmilller)'. Below this, the 'All Clients' section contains search instructions and a filter panel. The filter panel has fields for 'First Name', 'Last Name', 'SSN', and 'Site'. A dropdown menu for 'Clients Assigned to Clinician' is set to 'All Clinicians'. A green arrow points to the 'Unassigned Clients' link, and a yellow arrow points to the 'Clients Assigned to Clinician' dropdown.

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Client Information System

[Client List](#) [Create New Client](#) [Mid-Level Report](#) [User Management](#) [Account Settings](#) [Admin](#) [Logout \(jmilller\)](#)

[Home](#) > [Client List](#)

### All Clients

In any of the filter fields below, type in a whole or partial value and hit ENTER to search.  
Erasing the text in the field and hitting ENTER will reset the search.  
Use the Advanced Search to search on more than one field at a time.  
Click on a column title to toggle ascending & descending sorting.

[Advanced Search](#) [Clients Needing Intake Interview](#) [Active Clients](#) [Discharged Clients](#) [Unassigned Clients](#)

First Name

Last Name

SSN

Site

Clients Assigned to Clinician

# Client Management – Reassigning Cases Among Clinicians

- To assign/reassign client to a clinician, locate the client in the client list (this can be done from any client list on the home screen or from a clinician-specific client list as selected above) and click the client's name. This will bring up a screen with the client details as shown below.
- Click on **View Site Admin Assignments** to bring up the screen that shows which clinicians have access to that client.

The screenshot displays a web application interface for client management. At the top, a purple navigation bar contains links: Client List, Create New Client, Mid-Level Report, User Management, Account Settings, Admin, and Logout (jjmiller). Below this, a breadcrumb trail reads: Home » Client List » View Client Info.

The main heading is "Viewing Client Ryan Callahan". Below it is a table with client details:

First Name	Ryan
Last Name	Callahan
SSN	333445555
Birthday	03/21/1985
Site	Paducah Professional Associates
Client has received treatment at a facility outside the state of Kentucky in past 30 days	No

To the right of the details is a yellow sidebar titled "Operations" with three options: "Update Client Information", "View Clinician Assignments", and "Enter Intake Interview". A large blue arrow points from the "View Clinician Assignments" option towards the right.

Below the details table is a section titled "Client KORTOS History" with a table header:

Site	Intake Interview	Discharge Date	Report
------	------------------	----------------	--------

Below the header, it states "No results found."

# Client Management – Reassigning Cases Among Clinicians

- From the Current Assignments screen you can add this client to a clinician's client list by selecting the appropriate clinician from the drop down box and clicking on the **Create** button.
- To remove a client from a clinician's list you can simply click on the **trashcan icon** next to the staff member currently assigned to the client.

Client List Create New Client Mid-Level Report User Management Account Settings Admin Logout (jjmiller)

[Home](#) > [Client List](#) > View Client Info

## Viewing Clinician Permissions for Client Ryan Callahan

Clinicians who are allowed to work with this client are listed in the first table below. To assign another clinician access to this client, use the drop down box below and click the "Add" button.

### Clinicians Currently Able to View & Edit

Displaying 1-2 of 2 result(s).

Name	Type	Active Date	
Gloria Young (gyoung)	Site Admin [Sitewide Permission]	2012-08-28 12:30:07	
Paducah Associates (jperry)	Clinician [Assigned to Client List]	2015-02-02 15:05:46	<a href="#">Revoke</a>

### Grant User Permissions

Select Clinician

### Previous Clinician Access History

Name	Type	Active Date	Revoke Date
No results found.			

**Operations**

- Update Client Information
- View Client KORTOS History
- Enter Intake Interview



# Questions? Need more help?

Contact us and we'll be glad to help you!

## KORTOS Technical Questions

- Jeb Messer 859-257-1400 or jeb.messer@uky.edu

## Programmatic or KORTOS Questions

- TK Logan 859-257-8248 or tklogan@uky.edu

## Need a unique log-on ID and/or password

- Contact your Program Director

## Web address for KORTOS Client Information System

<https://ukcdar.uky.edu/KORTOS>

