



SOAR DATA TRACKING PROGRAM

VERSION 3.0

Program Description

The SOAR Data Tracking Program can be used by sites to track and report outcome data related to the SSI/SSDI application process. The program provides a means of electronically entering and saving data that are collected with the SOAR Data Form.

The SOAR Data Tracking Program includes various reporting options; the ability to extract the data stored in a site's copy of the program and transmit it to a central location; program security features; and file encryption features.

System Requirements

- Windows 2000, XP, or Vista
- Microsoft Access 2000, 2002, 2003, or 2007
- Internet access for download

Installation Instructions

The installation of this software to certain drive/folder/network locations may require a system administrator to be signed into the machine in question. If you have trouble with the installation procedure due to lack of administrative privileges, please contact your network administrator.

NOTE: If multiple workers at the same agency/organization want to keep track of all data in one copy of the database, we advise that the program be installed on a shared network drive and that all workers create shortcuts on their computer to that shared copy of the program. If, however, different people within an organization want to work with separate installations of the program on their own computers, keep in mind that there is no way for those program installations to communicate, and data will be stored separately on each computer. For situations such as these, we offer the SOAR Data Consolidation Program. Please see detailed description on page 4 for more information.

Downloadable Installation

- Determine which version of Microsoft Access your machine is running. This can be done by opening Access, going into the “help” menu, and selecting “About Microsoft Access.”
- Download the installer file that corresponds to your version of Access from the SOAR Web site and save it to your desktop.
- Double-click on the installer file to begin the installation process.
- Follow the installer’s on-screen instructions.

Using the Program

After the program is opened, a main menu will display automatically. The following is a list of the features that are available on that menu, along with brief descriptions:

Data Entry

Enter a New Record

This option takes you to a form which allows you to add new records to the program.

Browse/Edit Existing Records

This option takes you to a form which allows you to browse through all of the existing records that were previously saved in the program. Those records may be edited and deleted.

View/Edit a Specific Record

This option allows you to open a specific existing record by selecting the person's name from an alphabetical drop-down menu. Once a record is selected, it is displayed in a form, which allows you to edit or delete it.

Create/Edit/Delete Caseworker Records

Each application record requires information on the case worker assisting with the SSI/SSDI application. Since case workers usually assist with multiple applications, the program allows the user to enter and save this information so that there is no need to re-enter it after the first time.

Reporting

Generate Data Summary Report

This option generates a one-page report that summarizes the records that have been entered into the program. Statistics in the form of totals, averages, and percentages are calculated and displayed for all relevant data fields. In addition to various date range criteria options, there are also options for including and excluding the different types of application cases. (e.g. new SOAR applications, hearings or appeals, etc.)

Data Exports

The SOAR Data Tracking Program is capable of exporting all the data that are stored in the program to an extract file. Extract files can be used in conjunction with the optional SOAR Data Consolidation Program in situations where there are multiple sites within a state reporting to a central site or location.

Create .mdb (MS Access) Extract File

This option creates a data extract file in MS Access format.

Create .xls (MS Excel) Extract File

This option creates a data extract file in MS Excel format.

The SOAR Data Tracking Program is capable of automatically encrypting extract files with the password of your choice (*SEE "EXTRACT FILE SETTINGS" IN THE "SET-UP OPTIONS" SECTION BELOW*). The program is also capable of automatically emailing extract files to a central site or location when the files are generated and saved (*SEE "FILE TRANSMISSION SETTINGS" IN THE "SET-UP OPTIONS" SECTION BELOW*). Also, because some organizations do not want names, social security numbers, and birthdates included in extract files due to data sensitivity issues, there is an option to allow or disallow the inclusion of this information.

Data Collection

Printable Soar Data Form (.DOC)

This option opens a printable MS Word version of the SOAR Data Form on which this program is based.

Printable Soar Data Form (.PDF)

This option opens a printable PDF version of the SOAR Data Form on which this program is based.

Set-up Options

Site Settings

When there are multiple sites within a state reporting to a central site or location, each site can record their site name and site ID number in their copy of the program by using the “Site Settings” option. Site ID numbers must be 7 digits long (e.g. 0000003), and should be assigned to each site by the central location that will be collecting and consolidating the data.

In cases where there are multiple users at a specific site, a User ID number can also be assigned to each installation. User ID numbers must be 2 digits long (e.g. 02)

Extract File Settings

These settings allow the user to enable or disable the automatic password encryption of extract files that are created and saved by the program. If an extract file is encrypted with a password, it cannot be opened or viewed unless the correct password is entered. If you choose to enable password encryption, additional settings allow you to set, change, and delete the password.

NOTE: If multiple sites will be sending password encrypted extract files to a central site or location, it is best to assign one common password to all sites. This will make handling

multiple extract files and the data consolidation process much easier.

File Transmission Settings

These settings allow the user to enable or disable the automatic emailing of extract files to a central location. When automatic transmission is enabled, an extract file will be automatically emailed to a previously specified email address immediately after it is saved or created.

Please note that this automatic file transmission feature currently works only with SMTP mail servers.

Once automatic transmission is enabled, the user must enter and save the following information on the file transmission settings screen:

At most organizations, only an IT person will have the SMTP server information. Therefore, his or her assistance will most likely be needed for the initial configuration process.

- SMTP server IP address
- SMTP server port number
- *If the server requires authentication:*
 - SMTP username
 - SMTP password
- The sender’s email address (the site that is using the program and sending the files)
- The recipient’s email address (the central site that receives the extract files)

The file transmission settings can be tested once entered with the test button that is provided.

Security Settings

If you wish to restrict access to your copy of the SOAR Data Tracking Program, you can choose to password-protect it. Security options allow you to enable/disable password protection and change the existing program password if protection is already enabled. When password protection is enabled, the program will ask for the password immediately after it is opened. The correct password must be provided in order to continue to the program's main menu. Program passwords are case-sensitive, and should be created and entered accordingly.

Help

This section of the main menu allows you to access an electronic version of this user's manual and to email PRA for technical assistance.

SOAR DATA CONSOLIDATION PROGRAM

VERSION 3.0

Program Description

Some states have multiple sites that keep track of data in separate copies of the SOAR Data Tracking Program and report data to a central site or location. The SOAR Data Consolidation Program can be used by central sites to import and report on data that is sent to them routinely by various satellite sites.

Using the Program

The established process/procedure for usage is as follows:

- The central site installs the SOAR Data Consolidation Program.

- Each satellite site/user at site installs version 3.0 of the SOAR Data Tracking Program.
- Each site/user at site configures their copy of the program with the "site settings," "file transmission settings," and "extract file settings" options that can be accessed from the main menu (SEE THE SOAR DATA TRACKING PROGRAM INSTRUCTIONS FOR DETAILS).
- Each site/user at site routinely creates a data extract file and sends it to the central site.
- The central site collects all the extract files from the satellite sites/users at sites and uses the consolidation program to create a master data set from the extract files. This allows the central site to generate the Data Summary report based on all site data.

For more detailed information on using the Consolidation Program, please e-mail Jason DeStefano at soar@prainc.com.

TECHNICAL SUPPORT

If you are having difficulties installing or using this program, or if you have any technical questions, please e-mail:

soar@prainc.com