

Fast IDTS

System Guide

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***Fast* IDTS System Guide**

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Document Conventions

This manual uses the following typographic conventions.

Convention	Usage	Example
Bold	Menus, GUI elements, a strong emphasis	Click Apply or OK .
⇒	Series of menu selections	Select File ⇒ Save .
Monospace	Filenames, commands, directories, folders, URLs etc.	Refer to <code>readme.txt</code> .
<i>Italics</i>	Reference to document sections or products, or provides emphasis	See <i>FastIDTS System Guide</i>

Graphical indicators include the following:

Graphic	Indication
	Warning / Caution
	Note
	Tip

Level of Ability

This manual anticipates a certain level of ability by the user. The user should be familiar with proper use of a computer mouse and keyboard in the context of a PC running Microsoft Windows. The user should understand the usage of on-screen controls available in the Windows environment including the following:

- Buttons
- Menus
- Scroll bars
- Textboxes
- Item lists
- Drop-down lists

Users unfamiliar with these controls may find additional instruction helpful.

Organization of this Manual

Introduction	Provides context information and explains the usage of this manual.
Install and Setup <i>FastIDTS</i>	Describes activities involved in proper installation and setup of <i>FastIDTS</i> .
Conduct IDTS Assessments Using <i>FastIDTS</i>	Explains proper usage of <i>FastIDTS</i> .
Manage Information in <i>FastIDTS</i>	Explains activities for administration of <i>FastIDTS</i> .

Introduction

Welcome to *FastIDTS*!

The *FastIDTS* software system is designed to provide fast, accurate assessments with the Inventory of Drug-Taking Situations (IDTS) instrument.

IDTS is licensed and managed by Centre for Addiction and Mental Health (CAMH). The *FastIDTS* software system was developed and is managed by Rick Bell and Greg Graves. Prior permission was granted by Centre for Addiction and Mental Health (CAMH) in 2004 for development of software based on the IDTS instrument.

This guide provides information on how to setup and use *FastIDTS*. Each section identifies specific features, their purpose, and how to use them. Important points of interest are marked with special indicators in the margin. Additional graphics are provided throughout the guide to assist you visually in understanding the features described.

The guide describes how to do the following:

- Install and Setup *FastIDTS*
- Conduct IDTS Assessments Using *FastIDTS*
- Manage Information in *FastIDTS*

WHAT IS FASTIDTS? *FastIDTS* is a software system designed to streamline the process of administering assessments using the IDTS assessment instrument. *FastIDTS*:

- Automates questionnaire presentation and scoring procedures used for IDTS assessments,
- Provides easy-to-read, printable Client Profile charts upon completion,
- Is a secure software application, using both login and data encryption security measures, and
- Offers administration tools to manage data and view/print reports.
- Provides utilization reporting data on the number of IDTS instruments conducted electronically, required by the IDTS licensing agreement with CAMH.

MORE INFORMATION This guide presents information specific to the use of the *FastIDTS* system. For additional information about the IDTS assessment instrument, please refer to the *IDTS User's Guide* published by Centre for Addiction and Mental Health (CAMH) in Toronto, Ontario, Canada.

Install and Setup *Fast IDTS*

This section explains how to install and setup *FastIDTS*.

MINIMUM REQUIREMENTS Before installing *FastIDTS*, make sure the computer system you use meets the minimum requirements necessary for running *FastIDTS* described in Table 1:

Table 1: Minimum System Requirements for FastIDTS

Hardware

Component	Requirement
Computer Processor	Personal computer with an Intel Pentium 1.7-GHz processor
Memory	512 MB of RAM
Hard disk	40 GB hard disk
Drive	CD-ROM drive
Display	VGA display with resolution of 1024 X 768 or higher
Internet Connection	<p>Two options:</p> <ul style="list-style-type: none"> ▪ 56K-speed modem for dial-up access to network. ▪ Standard 10/100 Network Interface Card (NIC) for connection to high-speed Internet service (DSL or Cable), where available. <p>Many PCs now come with both options installed. Check with your vendor.</p> <p>Note for high-speed connections: Usually, an Internet service provider will supply a Cable or DSL modem, an external device for connecting to their service. The PC must be equipped with a NIC, which connects to the service provider's modem.</p>

Software

Component	Requirement
Operating System	Windows XP
Supporting Software	<p>Microsoft Office Professional Edition 2003</p> <p>Note: Only Microsoft Office Professional Edition 2003 includes MS Access 2003 software. Purchasing any other edition of Microsoft Office 2003 will require a separate purchase of MS Access 2003.</p>

INSTALL The installation of FastIDTS is a simple process. You begin by locating the file,
FASTIDTS **FastIDTS Setup.msi**.



When installing *FastIDTS*, note the warning below about overwriting files during installation. The warning only applies when *FastIDTS* is being re-installed on a computer. If you are re-installing *FastIDTS*, please read the warning carefully.



Warning! Installing *FastIDTS* more than once on the same computer may overwrite valuable database files. These files store crucial information about previous *FastIDTS* activities. Before reinstalling *FastIDTS*, please consult your support staff about proper backup of important data from previous *FastIDTS* installations.

After locating **FastIDTS Setup**, follow these steps to install *FastIDTS*:

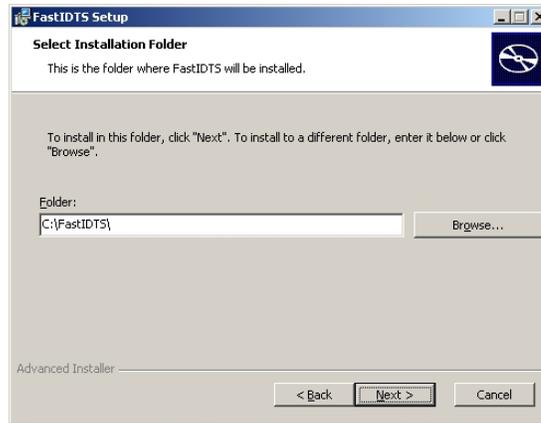
1. Double-click **FastIDTS Setup** to launch the installer. You will see the welcome screen depicted in Figure 1:

Figure 1: FastIDTS Installer Welcome Screen



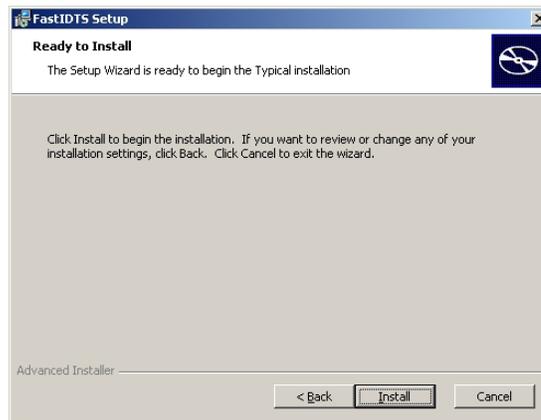
2. Click **Next** to move past the welcome screen. You will see the folder selection screen depicted in Figure 2:

Figure 2: FastIDTS Folder Selection Screen



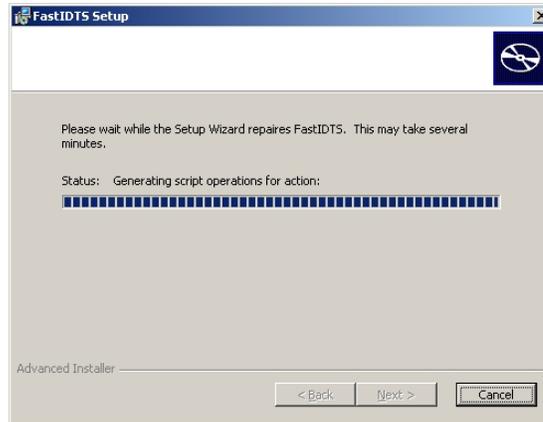
3. Without making any changes to the information in the screen above, click **Next** to move to the next screen. You will see the Ready-To-Install screen depicted in Figure 3:

Figure 3: FastIDTS Ready-To-Install Screen



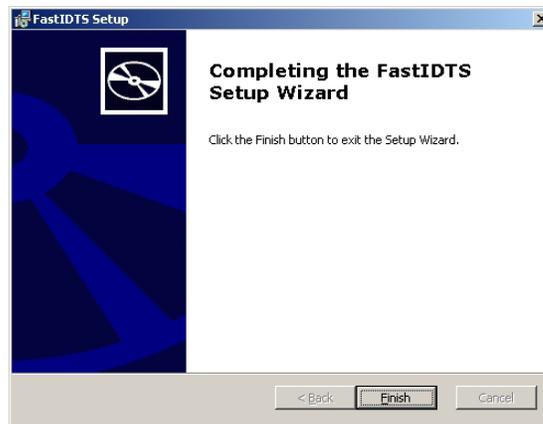
4. Click **Install**. You will see a screen similar to the Installation Progress screen depicted in Figure 4. The progress bars will indicate the installation progress.

Figure 4: FastIDTS Folder Installation Progress Screen



5. When done, the *FastIDTS* Installer will present the Installation Completion screen depicted in Figure 5. Click **Finish**.

Figure 5: FastIDTS Installation Completion Screen



Installation is complete.

SETUP FASTIDTS Once *FastIDTS* is installed, follow these instructions to setup *FastIDTS*.



Caution: After installation, do not move *FastIDTS* from folder `C:\FastIDTS`. *FastIDTS* will malfunction if moved. *FastIDTS* will not run on a network.



If *FastIDTS* is not in folder `C:\FastIDTS`, simply copy all of its components back to folder `C:\FastIDTS` to return it to proper working order.

SETUP SHORTCUTS FOR CONVENIENCE

For your convenience, *FastIDTS* installs two shortcuts on the Windows Desktop. You may copy or move these shortcuts wherever you wish to conveniently launch the *FastIDTS* system. These shortcuts are listed in Table 2:

Table 2: Windows Shortcuts for FastIDTS

<i>Shortcut Name</i>	<i>Icon</i>	<i>Purpose</i>
FastIDTS Assessment		Conducting assessments with <i>FastIDTS</i>
FastIDTS Management		Accessing <i>FastIDTS</i> management features



You may copy or move the *FastIDTS* shortcuts to any location on your PC to provide convenient access to *FastIDTS*.

SETUP SITE NAME AND POSITION NUMBER

Since *FastIDTS* runs as a stand-alone application, a single agency (Site) might have several installations (Positions) of *FastIDTS*. *FastIDTS* provides a means to uniquely identify each of these installations using the Site Name and Position Number settings.



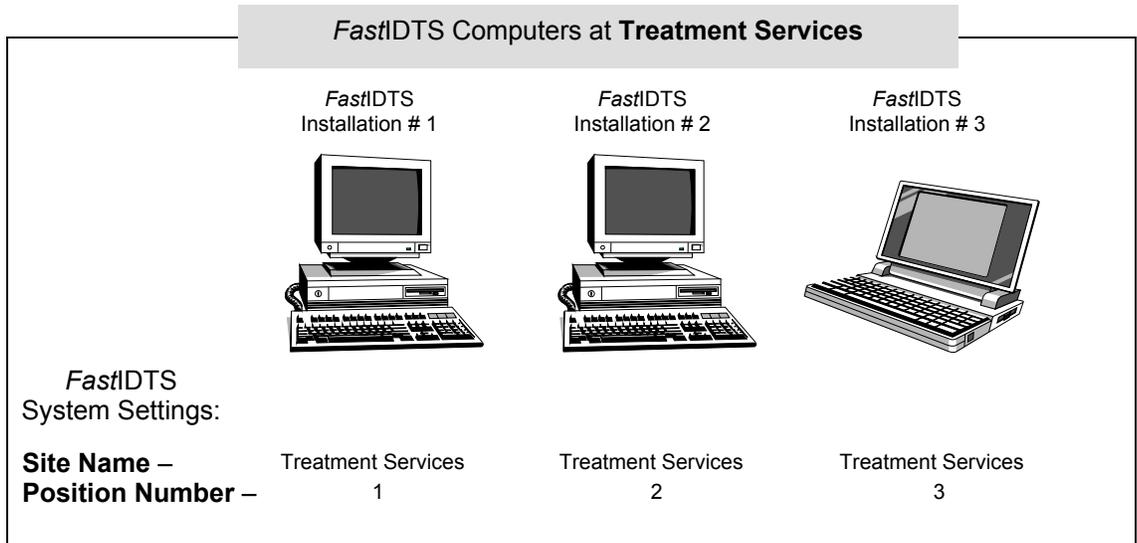
By setting Site Name and Position Number appropriately, administrators can distinguish reports and information from each *FastIDTS* installation in their agency.



Administrators are advised to plan ahead for the Site Name and Position Number of each *FastIDTS* installation in their area. Such planning will likely provide better organization and easier management of *FastIDTS* over time.

Figure 6 depicts how an agency named **Treatment Services** might choose to set **Site Name** and **Position Numbers** for multiple *FastIDTS* installations.

Figure 6: Setting Site Name and Position Numbers for Multiple PCs



In the example above, the agency, **Treatment Services**, has three computers designated for running *FastIDTS*: two desktop PCs and one laptop PC. Given the example, we recommend the *FastIDTS* settings in Table 3:

Table 3: Settings for Site Name and Position Numbers

Setting Name	Setting Value	Where
Site Name	Treatment Services	All three computers
Position Number	1	<i>FastIDTS</i> installation #1
	2	<i>FastIDTS</i> installation #2
	3	<i>FastIDTS</i> installation #3

Upon the very first startup of each installation, *FastIDTS* will prompt the user to set the values for **Site Name** and **Position Number**. We recommend launching *FastIDTS* to set these values now. Please see the steps below to properly set these values.

Steps for *FastIDTS* Setup of **Site Name** and **Position Number**

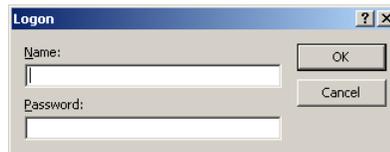
1. Launch the **FastIDTS Management** module using the Windows shortcut depicted in Figure 7:

Figure 7: Windows Shortcut for FastIDTS Management Module



2. You may be prompted with a **System Logon** screen as depicted in Figure 8:

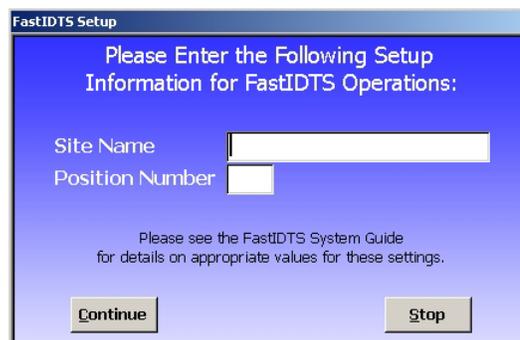
Figure 8: System Logon Screen



If so, follow these steps to complete the **System Logon** screen:

- a) Enter **IDTSMgr** in the **Name** textbox.
 - b) Enter the proper password in the **Password** textbox.
 - c) Click **OK** to continue, or **Cancel** to stop.
3. Then, the **FastIDTS Setup** screen is presented, with fields for setting **Site Name** and **Position Number**, as depicted in Figure 9.

Figure 9: FastIDTS Setup Screen



4. Enter values for the **Site Name** and **Position Number** settings.



Site Name is limited to 20 characters maximum.
Position Number must be a whole number (no decimals or fractions).

5. After entering the setup values, click **Continue** to save then. Then, choose **File⇒Exit** on the menu bar of the **FastIDTS Administration Menu** to quit *FastIDTS*.

Setup of **Site Name** and **Position Number** is complete.

SETUP LISTS

Typically, *FastIDTS* is installed with lists for **Client Sources**, **Screening Locations**, and **Source/Locations**. Please speak to your support staff before making corrections or additions to these lists.

Conduct IDTS Assessments Using *FastIDTS*

This section explains how to conduct an IDTS assessment using *FastIDTS*.

OVERVIEW Once *FastIDTS* is installed and setup, you can begin conducting IDTS assessments.

Here are the steps that comprise a complete assessment in *FastIDTS*:

1. Start *FastIDTS*
2. Login
3. Enter Personal Information
4. Select Substances
5. Respond to Situations
6. View / Print Assessment Report

Each of these steps is described in detail below.

START FASTIDTS ASSESSMENT Follow these steps to start an IDTS assessment

1. Find the shortcut labeled *FastIDTS Assessment*, depicted in Figure 10:

Figure 10: FastIDTS Assessment Shortcut



2. Double-click the *FastIDTS Assessment* shortcut.

LOGIN When you start *FastIDTS*, you will be presented with a login screen.



The *FastIDTS* login process may vary depending on how your computer is setup. You may see two possible login screens when *FastIDTS* starts:

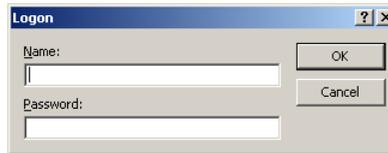
1. System Logon
2. Assessment Login

Please follow the instructions below for each login screen presented to you.

SYSTEM LOGON

The **System Logon** screen is depicted in Figure 11:

Figure 11: System Logon Screen



Follow these steps to complete the **System Logon** screen:

- d) Enter **IDTSCClient** in the **Name** textbox.
- e) Enter the proper password in the **Password** textbox.
- f) Click **OK** to continue, or **Cancel** to stop.

FAST IDTS LOGIN

The **FastIDTS Login** screen is depicted in Figure 12:

Figure 12: FastIDTS Login Screen



Follow these steps to complete the **FastIDTS Login** screen:

1. Enter the proper password in the **Admin Password** textbox.
2. Choose a **Client Source** from the choices provided in the drop-down list.
3. Choose a **Screening Location** from the choices provided in the drop-down list. The **Client Source** choice in the previous step determines the values in this list.
4. Click **Continue** to proceed, or **Stop** to halt the login process.



If you make an incorrect entry in any of these fields, and click **Continue**, the **FastIDTS Login Screen** will clear the Password textbox and prompt you to correct the entries.



The **Save Presets** button on the *FastIDTS* Login screen is very useful! It allows you to save the **Client Source** and **Screening Location** as “presets” for later use.

After you set the **Client Source** and **Screening Location**, click **Save Presets** to save them for later use. When you run *FastIDTS* again, the presets you saved will appear automatically, saving you from entering them next time.

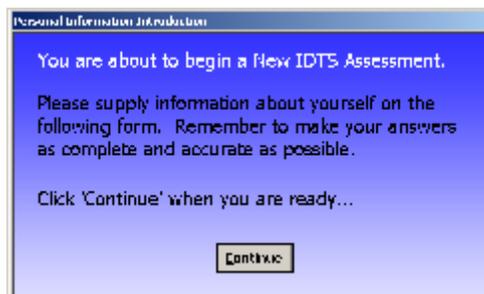
You can change the presets as often as you like.

ENTER PERSONAL INFORMATION

After login is complete, *FastIDTS* presents an introduction screen explaining the purpose of the next screen, **Personal Information**.

The **Personal Information Introduction** screen is depicted in Figure 13:

Figure 13: Personal Information Introduction Screen



Click **Continue** to proceed to the **Personal Information** screen.

FastIDTS collects personal information about each client it assesses including the following information:

- First name
- Middle name
- Last name
- Suffix (Jr., Sr., III, etc)
- Gender
- Birth date
- MDOC (Maine Dept of Corrections number)

The **Personal Information** screen is depicted in Figure 14:

Figure 14: Personal Information Screen

All fields on the **Personal Information** screen are textboxes requiring a typed response, except the **Gender** field, which requires a choice from its drop-down list.



Leave MDOC blank when this information is not available for the client. However, it is important that the client completes all the other information on this screen. *FastIDTS* prompts for any missing information.



You may use the **Tab** key to move from one field to another on the **Personal Information** screen. Also, you may use the mouse to position the cursor for typing.

Click **Continue** when Personal Information is complete. Click **Stop** to abandon the current assessment.

SELECT SUBSTANCES After collecting **Personal Information** about the client, *FastIDTS* presents the next screen, **Substance Selection**.

As described earlier, an IDTS assessment collects and scores responses regarding one, two, or three substances chosen by the client. After selecting the substance(s), the client responds to 50 situations for each substance s/he selected.

The **Substance Selection** screen provides a list of substances from which the client may choose. Alcohol and a variety of drugs are among the substances in the list.

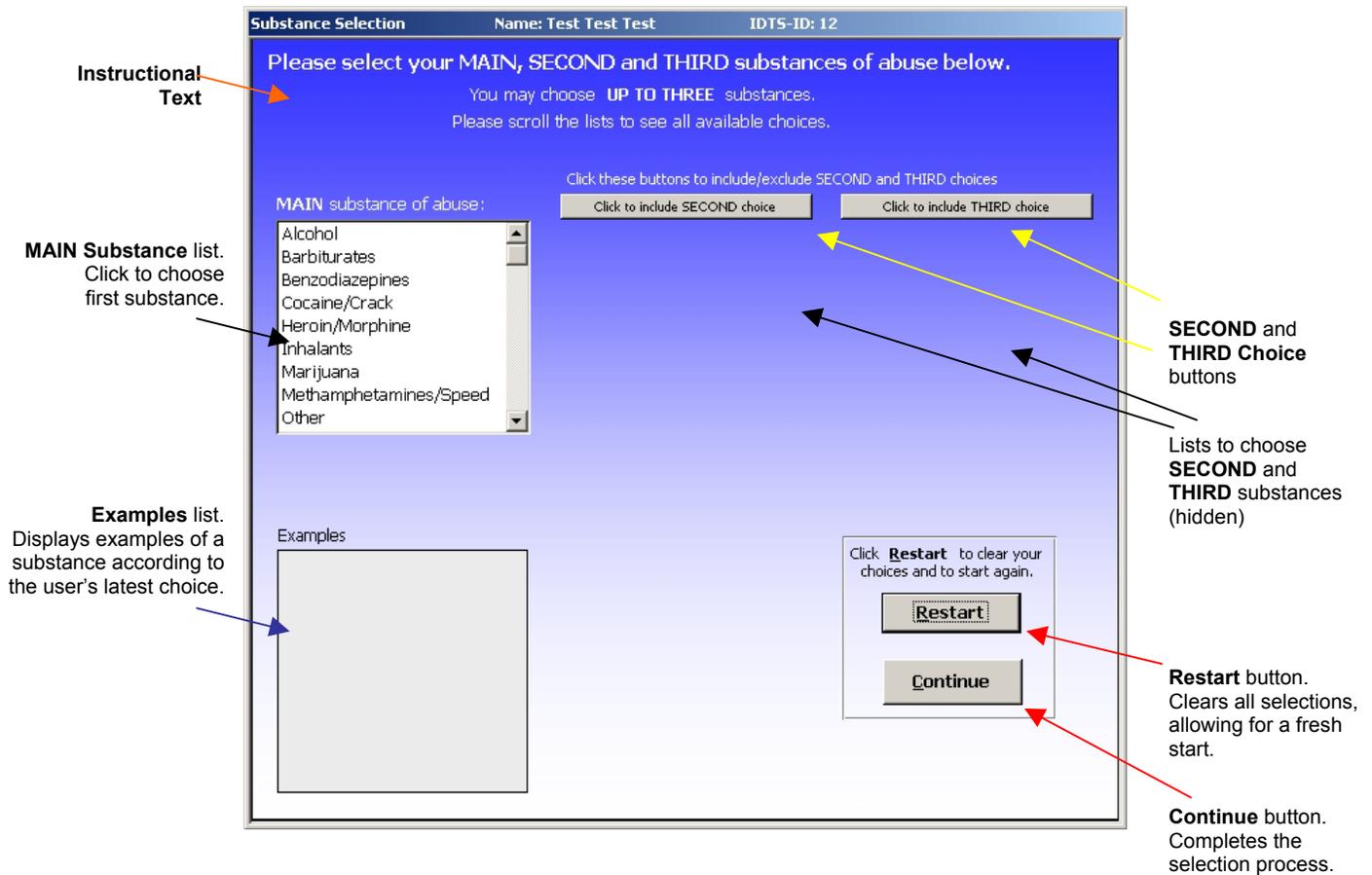
SCREEN LAYOUT

The **Substance Selection** screen is very flexible. Here are its most important features:

- Three lists for selecting one, two, or three substances for the current IDTS assessment
- **Examples** window to display a list of related names for a selected substance
- **Restart** button to clear all selections, allowing for a fresh start
- **Continue** button to complete the selection process

Figure 15 depicts how the **Substance Selection** screen first appears. Labels have been added to describe the different parts of the screen.

Figure 15: Substance Selection Screen



SELECTION SCENARIOS

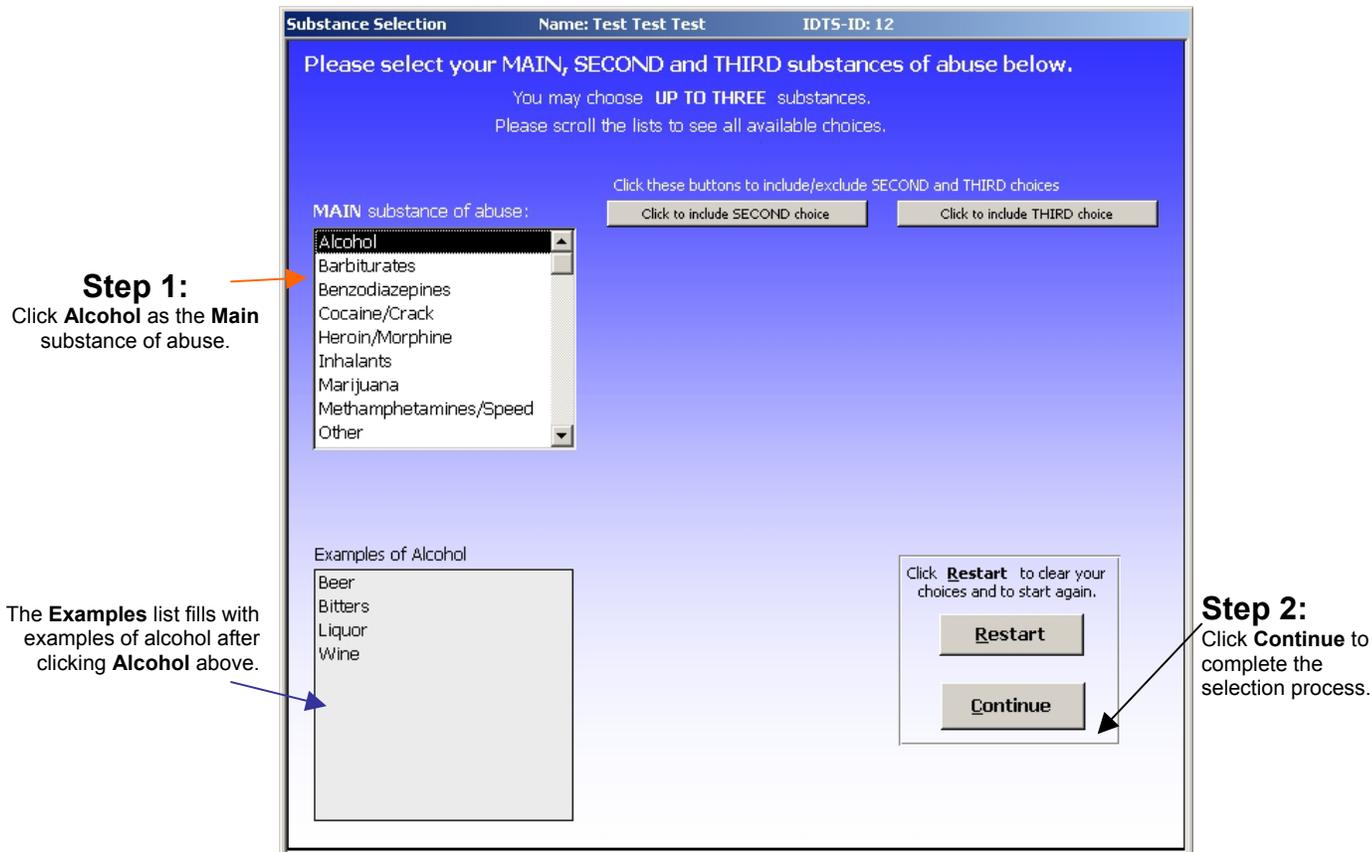
In this section, we examine the different selection scenarios available for choosing substances for IDTS assessment. Each scenario is visually enhanced by graphics with

steps indicating the actions to take on the **Substance Selection** screen. The scenarios describe how to select one, two, or three substances.

SCENARIO ONE: SELECTING ONE SUBSTANCE

Figure 16 depicts the two steps involved in selecting one substance, **Alcohol**, for IDTS assessment, and how the **Substance Selection** screen looks afterward.

Figure 16: Scenario One - Selecting One Substance



As depicted in Figure 16, the process of selecting one substance is simple:

1. Click on **Alcohol** in the list for **Main** Substance of Abuse
2. Click **Continue** to complete the selection process.



Notice the **Examples** list fills with examples of alcohol after clicking **Alcohol** as the **Main Substance of Abuse**.

Next, we will look at a scenario where two substances are selected.

SCENARIO TWO: SELECTING TWO SUBSTANCES

Figure 17 depicts how the **Substance Selection** screen looks after selecting the following two substances for IDTS assessment:

1. **Alcohol** as the **Main** Substance of Abuse
2. **Heroin** as the **Second** Substance of Abuse

Figure 17 also indicates the steps involved to accomplish this goal.

Figure 17: Scenario Two - Selecting Two Substances

The screenshot shows the 'Substance Selection' window with the following elements and annotations:

- Step 1:** An arrow points to the 'MAIN substance of abuse:' dropdown menu where 'Alcohol' is selected. The annotation reads: 'Click **Alcohol** as the **Main** substance of abuse.'
- Step 2:** An arrow points to the 'Click to include SECOND choice' button. The annotation reads: 'Click **Second Choice** button to display list.'
- Step 3:** An arrow points to the 'Heroin/Morphine' option in the second dropdown menu. The annotation reads: 'Click **Heroin** as the **Second** substance of abuse.'
- Step 4:** An arrow points to the 'Continue' button. The annotation reads: 'Click **Continue** to complete the selection process.'
- An annotation on the left side points to the 'Examples of Heroin/Morphine' list, which contains 'Heroin', 'Methadone', and 'Morphine'. The text reads: 'The **Examples** list fills with examples of Heroin after clicking **Heroin / Morphine** as the **Second** choice.'

As depicted in Figure 17, the procedure for selecting two substances is straightforward:

1. Click on **Alcohol** in the list for **Main** Substance of Abuse
2. Click the **Second Choice** button to display the list.
3. Click **Heroin / Morphine** as the **Second** Substance of Abuse.
4. Click **Continue** to complete the selection process.

Next, we will look at a scenario where three substances are selected.

SCENARIO THREE: SELECTING THREE SUBSTANCES

Figure 18 depicts how the **Substance Selection** screen looks after selecting the following two substances for IDTS assessment:

1. **Alcohol** as the **Main** substance of abuse
2. **Heroin** as the **Second** substance of abuse
3. **Marijuana** as the **Third** substance of abuse

Figure 18 also indicates the steps involved to accomplish this goal.

Figure 18: Scenario Three - Selecting Three Substances

The screenshot shows the 'Substance Selection' window with the following elements and annotations:

- Step 1:** An arrow points to the 'MAIN substance of abuse' dropdown menu where 'Alcohol' is selected.
- Step 2:** An arrow points to the 'Click to exclude SECOND choice' button.
- Step 3:** An arrow points to the 'Click to exclude THIRD choice' button.
- Step 4:** An arrow points to the 'Click to exclude THIRD choice' dropdown menu where 'Marijuana' is selected.
- Step 5:** An arrow points to the 'Click to exclude SECOND choice' dropdown menu where 'Heroin/Morphine' is selected.
- Step 6:** An arrow points to the 'Continue' button.

Additional annotations include:

- A note pointing to the 'Examples of Marijuana' list: 'The Examples list fills with examples of Marijuana after clicking Marijuana as the Third choice.'
- A note pointing to the 'Restart' button: 'Click Restart to clear your choices and to start again.'

As depicted in Figure 18, the procedure for selecting three substances is straightforward:

1. Click **Alcohol** as the **Main** substance of abuse.
2. Click the **Second Choice button** to display the list.

3. Click **Heroin / Morphine** as the **Second** substance of abuse.
4. Click the **Third Choice button** to display the list.
5. Click **Marijuana** as the **Third** substance of abuse.
6. Click **Continue** to complete the selection process.



Notice the **Examples** list contains examples of **Marijuana** now.

If you watch the **Substance Selection** screen each time you click a substance, you will notice the **Examples** list changes with new substance names related to your choice.

Another feature of the **Substance Selection** screen is its ability to avoid duplicate substance choices. For example, if you click **Stimulants** as the main substance of abuse, **Stimulants** will not appear in the second or third choice lists. This feature ensures that each substance choice is unique for the assessment.

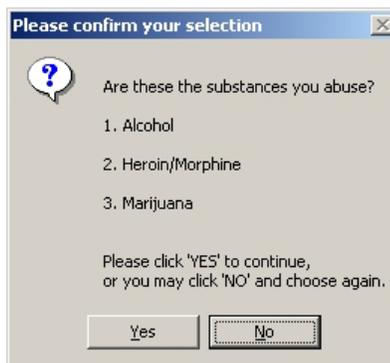


The **Restart** button is very useful! If you have made the wrong selections, and wish to start over, just click **Restart** to restore the **Substance Selection** screen to its original settings. Then, begin selecting substances again.

FINAL CONFIRMATION

The **Substance Selection** screen asks for confirmation of substance choices. Given the **Scenario for Three Substances** presented above, the confirmation dialog box would appear as depicted in Figure 19:

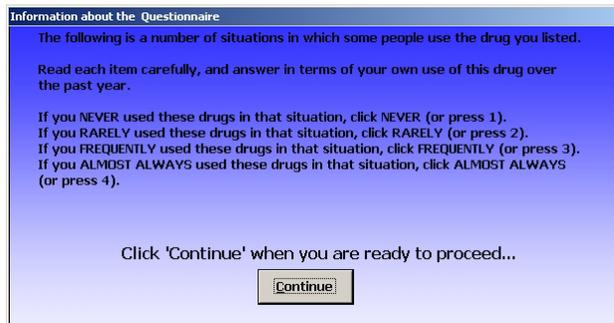
Figure 19: Substance Selection Confirmation



Click **Yes** to confirm the selection, or **No** to change the selection.

RESPOND TO SITUATIONS After completing **Substance Selection**, *FastIDTS* presents an Introduction screen titled **Information about the Questionnaire** as depicted in Figure 20:

Figure 20: Information about Questionnaire Screen



The Introduction explains how to respond to the Drug-Taking Situations that are presented on the next screen. Also it advises care in reading and responding to the situations and presents the four response choices for each situation that follows. The response choices are listed below:

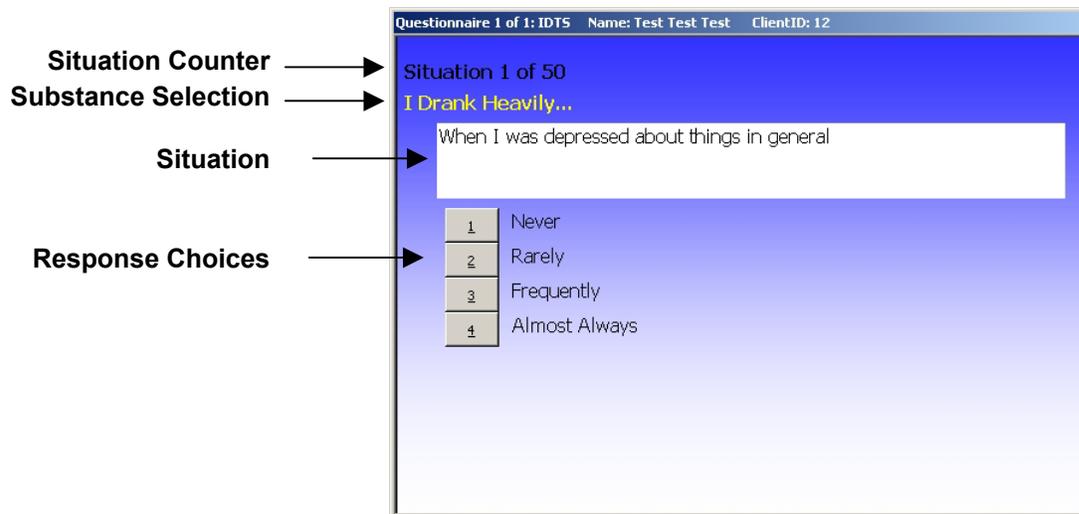
- 1 indicates the substance has **Never** been used.
- 2 indicates the substance has **Rarely** been used.
- 3 indicates the substance has **Frequently** been used.
- 4 indicates the substance has **Almost Always** been used.

After reading these instructions, the client clicks **Continue** to proceed to the **Drug-Taking Situations** screen.

THE DRUG-TAKING SITUATIONS SCREEN

Figure 21 depicts the **Drug-Taking Situations** screen as it begins its presentation. Labels have been added to describe its different parts.

Figure 21: Drug-Taking Situations Screen



Each **Drug-Taking Situation** is presented on a separate screen along with its available responses. The client needs to read the situation and click a response button (**1, 2, 3, or 4**). Alternately, the respondent may press the numeric key corresponding to the desired response.



For each new situation, *FastIDTS* hides the **Next Question** button. This ensures the client responds to the current situation before moving forward to the next one.

Each time the client makes a response choice, **Next Question** reappears.

CHOOSING A RESPONSE

Figure 22 depicts the client’s response to the first situation for **Alcohol**, with steps on how this is accomplished.

Figure 22: Response to first Drug-Taking Situation for Alcohol

The screenshot shows a window titled "Questionnaire 1 of 1: IDTS" with "Name: Test Test Test" and "ClientID: 12". The main content area is blue and contains the text "Situation 1 of 50" and "I Drank Heavily...". Below this is a white text box containing the sentence "When I was depressed about things in general". Underneath the text box are four response buttons labeled 1 through 4, corresponding to "Never", "Rarely", "Frequently", and "Almost Always". At the bottom right of the window is a "Next > Question" button. Three arrows point from text labels on the left to these elements: "Step 1" points to the situation text, "Step 2" points to the response buttons, and "Step 3" points to the "Next > Question" button.

Step 1:
Read and consider the current drug-taking situation.

Step 2:
Click the desired **Response** button for the current situation.
Notice **Next Question** button appears after responding.

Step 3:
Click **Next Question** to view the next situation.

As reflected in Figure 22, the client follows these steps to respond to each drug-taking situation:

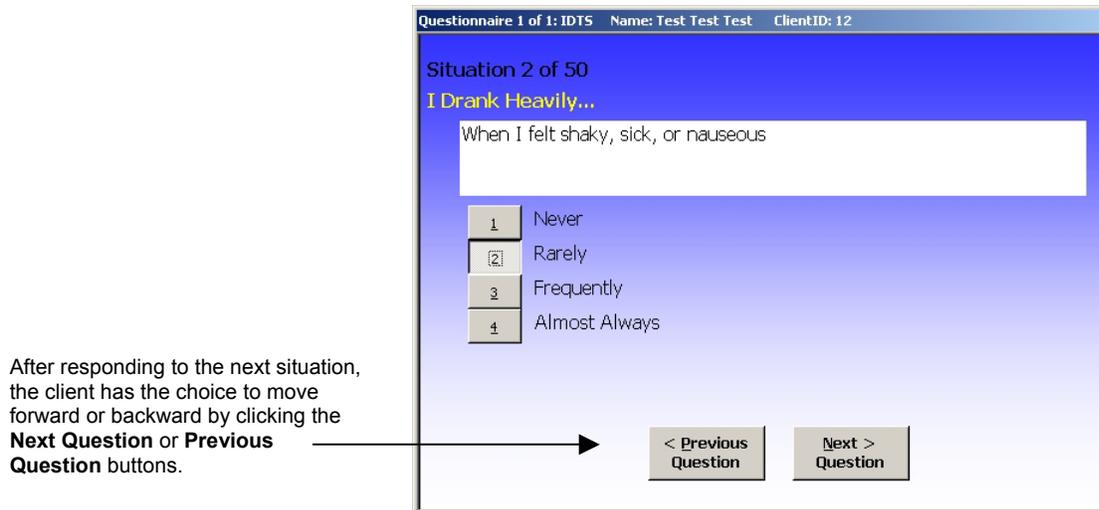
1. Read and consider the situation described.
2. Click the appropriate response button.
3. Move to the next situation by clicking the **Next Question** button.



As the client responds to additional situations, the **Previous Question** button appears, giving the client the option to move backward to review his/her response to past situations. While reviewing previous situations, the client may change his/her response if desired.

In Figure 23, the client responds to the second situation for **Alcohol**.

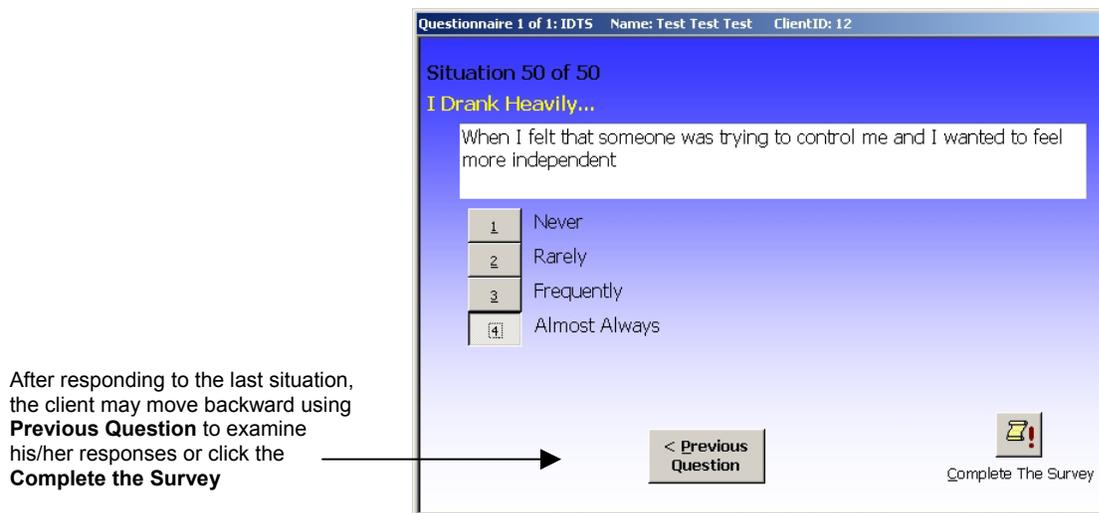
Figure 23: Response to second Drug-Taking Situation for Alcohol



COMPLETING THE SURVEY

FastIDTS presents the client with 50 situations for each substance selected for the assessment. Upon responding to the 50th situation, the **Complete the Survey** button appears. Figure 24 depicts the end of the **Alcohol** situations:

Figure 24: Completing the Survey



Depending on the number of substances selected, the **Drug-Taking Situations** screen may recycle and present the situations for other selected drugs in the assessment.

If the client has finished responding to drug-taking situations for all substances selected for the assessment, then the dialog box depicted in Figure 25 appears:

Figure 25: Assessment Complete



Click **OK** to review the **Assessment Report**

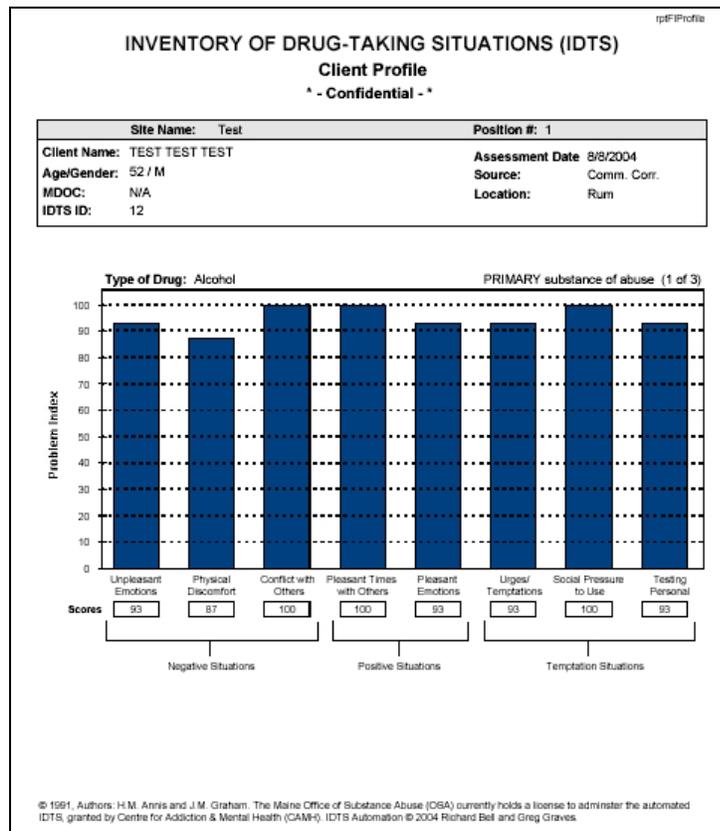
**VIEW / PRINT
ASSESSMENT
REPORT**

After clicking **OK** in the dialog box above, *FastIDTS* displays the current assessment report. The report contains a separate page for each substance included in the assessment, up to three pages maximum.

REPORT SAMPLE

The **IDTS Client Profile Report** is depicted in Figure 26. Please refer to the *IDTS User Manual* published by CAMH for information about interpreting this report.

Figure 26: IDTS Client Profile Report



REPORT FILE MENU

FastIDTS provides the **File** menu at the top-left portion of the report viewer window for Printing and Closing the report. These are options on the **File** menu:

- **File⇒Print** to display a print dialog box for printing
- **File⇒Close** to close the report viewer.
- **File⇒Print Setup** to manipulate various print settings specific to the report.

VIEWING THE REPORT

The report viewer offers two views from examining an assessment report:

- **Close-up View** allows you to examine the details of a single page of the report.
- **Full Page View** allows you to examine the entire page at once. Also, in Full Page view, you can move to other pages in the report.



Switch between report views by clicking on the report.

PRINTING THE REPORT

To print the assessment report, choose **File⇒Print** from the report menu bar and click **OK** on the Print dialog box that appears.

REPRINTING THE REPORT

Certain situations may prevent you from printing a report at the end of an assessment. Possible situations include the following:

- Printer malfunction
- No printer available
- Power outage
- Computer malfunction
- Other external causes

The **FastIDTS Management** module provides features for report printing, in case you wish to reprint a report. See the next section, **Manage Information in Fast IDTS**, for details on report management and printing.

CLOSING THE REPORT

To close the assessment report, choose **File⇒Close** from the report menu bar.



Closing the report causes *FastIDTS* to recycle and present the **Fast IDTS Login** screen again.

Manage Information in *FastIDTS*

FastIDTS has a robust storage system containing all information pertaining to its assessments. This section describes features for managing IDTS assessments in the *FastIDTS* Management module, including the following:

- Client List
- Reports
- System Settings, including **Site Name** and **Position Number** and lists for **Client Source**, **Screening Location** and **Source Locations**.

First, start *FastIDTS* Management module and login.

START FASTIDTS MANAGEMENT

Follow these steps to start the *FastIDTS* Management module.

1. Find the shortcut labeled *FastIDTS* Management, depicted in Figure 27:

Figure 27: *FastIDTS* Management Shortcut

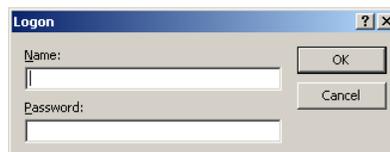


2. Double-click the *FastIDTS* Management shortcut.

LOGIN When you start the *FastIDTS* management module, it might prompt you with a login screen. If so, follow these instructions to login.

Figure 28 depicts the **System Logon** screen:

Figure 28: *FastIDTS* System Logon



Follow these steps to complete the **System Logon** screen:

1. Enter **IDTSMgr** in the **Name** textbox.
2. Enter the proper password in the **Password** textbox.
3. Click **OK** to continue, or **Cancel** to stop.

ADMINISTRATION MENU The **Administration Menu** provides access to the features in the *FastIDTS* Management module. Figure 29 depicts the Administration Menu:

Figure 29: *FastIDTS* Administration Menu



From this menu, you can manage the Client List, Reports, System Settings, and Delete a Client using a Client ID number.

MANAGE CLIENT LIST The **Client List** provides access to all clients stored in *FastIDTS*. This feature allows you to view, search, sort, edit, and delete clients from the *FastIDTS* database.

CLIENT LIST OVERVIEW

Managing the Client List is important in maintaining an accurate database of the assessments performed by *FastIDTS*. Sometimes, due to human or computer error, assessments may need to be edited or deleted using Client List management. Use the following features to perform these tasks.

VIEW CLIENT LIST

To open the list for viewing, click **Client List** on the Administration Menu. Figure 30 depicts an example of the Client List view:

Figure 30: Client List view

ClientID	MDOC	FName	LName	MName	SName	Gender	ClientSource	Location	AGE	DOB	CreateDate
3		TEST	TEST	TEST		M	Comm. Corr.	Cal	48	3/4/1956	07/24/04 18:11
4		TEST	TEST	TEST		M	Comm. Corr.	Cal	48	3/4/1956	07/24/04 18:13
5	888888	TEST	TEST	TEST	TEST	M			23	8/8/1980	07/24/04 23:04

If sufficient rows are present, scrollbars may appear to help you to move through the list. Additionally, the record navigator controls at the bottom left corner of the client list view give you further control in finding a particular client row.

SEARCH CLIENT LIST

You may search the list to find information you need either by searching a specific field or all fields in the client list.



If you wish to search a specific field, select the field first by clicking its column heading.

The Client List offers two different ways to initiate a search:

1. Press **CTL+F**
2. **Right-click** to open the shortcut menu.

Figure 31 shows the shortcut menu in the Client List view.

Figure 31: Client List view with Shortcut Menu

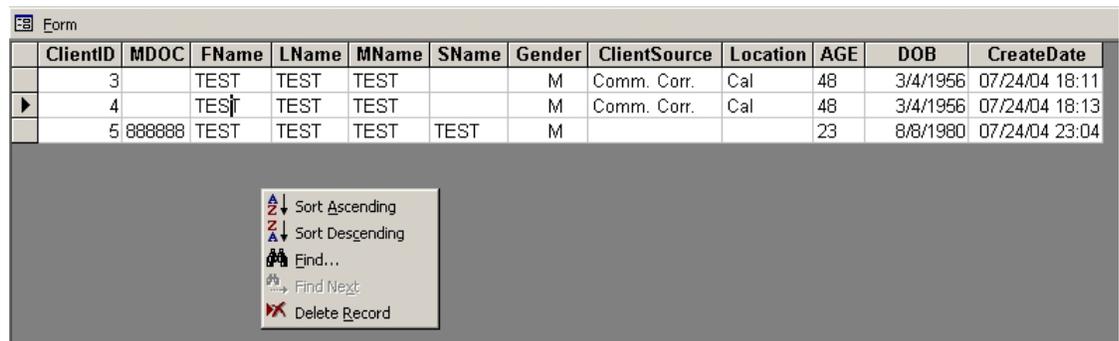
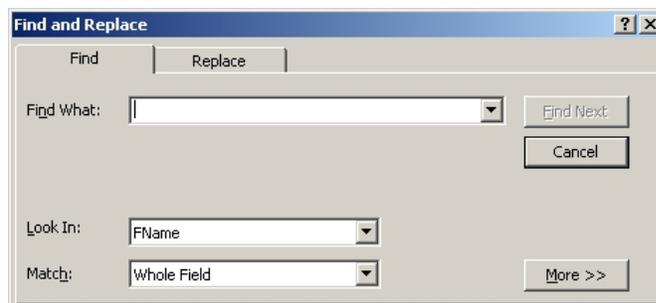


Figure 32 depicts the **Find and Replace** dialog box:

Figure 32: Find and Replace Dialog Box



To search, follow these steps:

1. Enter the information you wish to find in the drop-down box labeled **Find What**.
2. Choose either a specific field or the entire Client List in the drop-down labeled **Look In**.
3. Click **Find Next** to move to the next occurrence in your search.

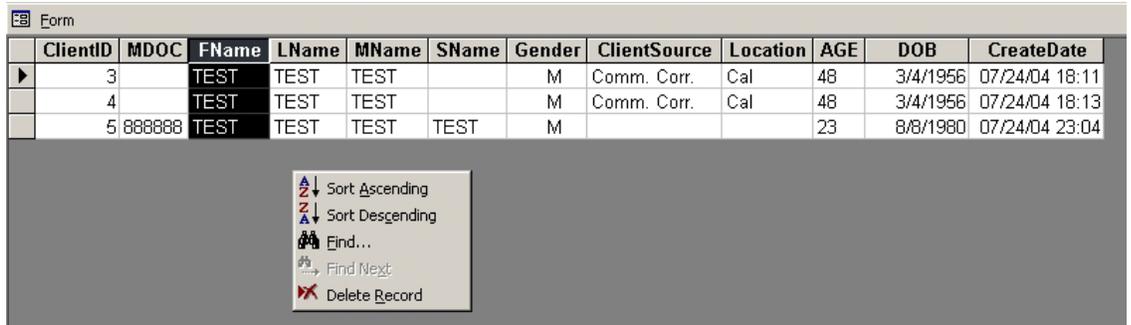
SORT CLIENT LIST

You may sort the list on a specific field either in ascending or descending order.



To sort on a specific field, select the field first by clicking its column heading as shown in Figure 33:

Figure 33: Sorting the Client List



To sort the Client List, follow these steps:

1. Select the column on which to sort.
2. Right-click to display the shortcut menu.
3. Choose **Sort Ascending** or **Sort Descending**



The following sections demonstrate how to edit and delete information in *FastIDTS*. Please understand all changes you make to information in *FastIDTS* are permanent. Use caution and deliberation before editing or deleting the crucial information about clients stored in *FastIDTS*.

EDIT CLIENT DATA

Follow these steps to edit data in the **Client List**:

1. Use the mouse to select the information you want to edit.
2. Type the information you wish to save about the client.



- Only the **MDOC** field may be blank. All other fields must contain information.
- **Gender** is a drop-down list. Values for this field must be selected from the list.
- **ClientID** is set by *FastIDTS*, and may not be changed.
- **Age** is based on when the client assessment was created. As a calculated field, it may not be changed.
- **CreateDate** is a system-generated field. It may not be changed.

DELETE A CLIENT ROW

Follow these steps to delete a row in the **Client List**:

1. Use the mouse to select the row you want to delete. Do this by clicking the record selector (gray box) to the left of the row
2. Press the **Delete** key on the keyboard. Or right-click to display the shortcut menu, and choose the **Delete Record** option.



To save changes to the Client List view, move the cursor to a different row in the view or close the Client List view by choosing **Form⇒Close**.

CLOSING THE CLIENT VIEW

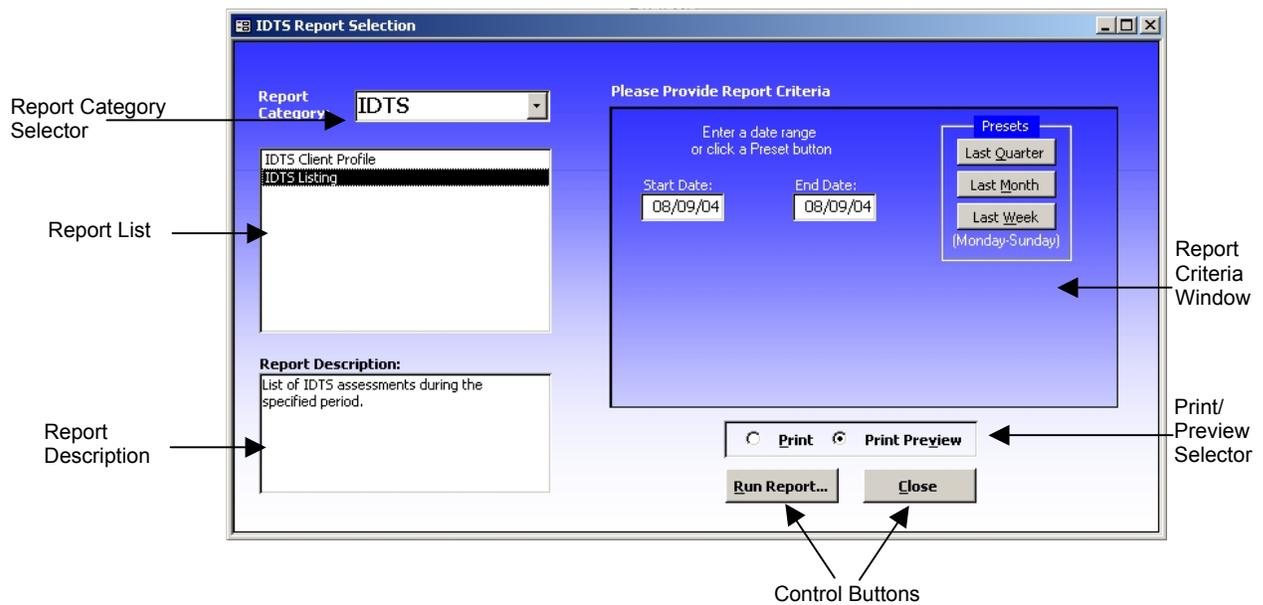
Use the Form menu bar at top right to close the Client View. Click **Form⇒Close**.

MANAGE REPORTS The **Reports Menu** provides access to the reports available in *FastIDTS*. This feature allows you to select a report, set criteria for the report, and print or view it.

REPORTS MENU OVERVIEW

Click the **Reports** button on the **Administration Menu** to access *FastIDTS* reports. The Reports Menu and its parts are depicted in Figure 34:

Figure 34: Report Selection Menu



REPORTS MENU PARTS

The parts of the **Reports Menu** are described in Table 4:

Table 4: Report Menu Parts

Part	Description
Report Category Selector	Allows switching between report categories. Currently, <i>FastIDTS</i> has only one report category.
Report List	Displays a list of reports for the selected Report Category
Report Description	Describes the currently selected report
Report Criteria Window	Used for setting criteria required when running a report
Print / Preview Selector	Selects whether to preview or print the selected report
Control Buttons	Runs the selected report or closes the Reports Menu

FAST IDTS REPORTS

FastIDTS comes with two reports:

- **IDTS Client Profile.** Use this report for reprinting or viewing individual IDTS assessment reports.
- **IDTS Assessment Listing.** Use this report for reviewing the IDTS conducted during a specified period. This report also provides summary data regarding utilization of IDTS instrument conducted electronically and required by the IDTS licensing agreement with CAMH. See **IDTS Utilization Reporting Requirements** below for additional information on OSA reporting requirements.

IDTS UTILIZATION REPORTING REQUIREMENTS

The Office of Substance Abuse (OSA) requires periodic reporting of IDTS utilization per license agreement with Centre for Addiction and Mental Health (CAMH). You are required to submit reports on IDTS usage. Be sure to submit to OSA the information reflected in the **Report Summary** header of the **IDTS Assessment Listing** report according to the schedule listed in Table 5. OSA needs this utilization reporting for each computer workstation with FastIDTS installed in your agency. This information should be sent with or included in your agency quarterly and year-end narrative reports:

Table 5: IDTS Assessment Reporting Schedule

Report Due Date	Report Type	Date Range
October 30	Quarterly	July 1 – September 30
January 30	Quarterly	October 1 – December 31
April 30	Quarterly	January 1 – March 31
August 30	Year-end	July 1 (previous year) – June 30

REPORT CRITERIA

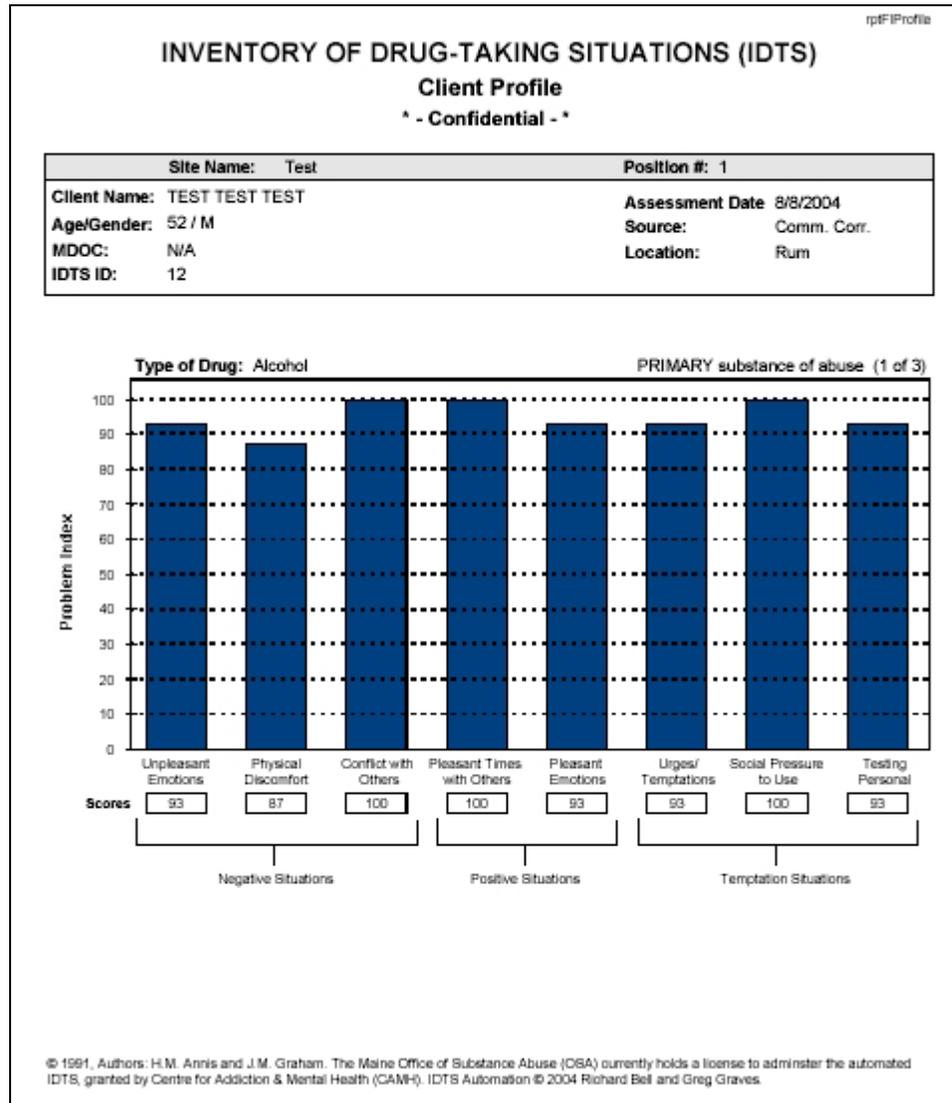
Each report uses a set of criteria, set by the user, to determine its contents. When selecting a report in the **Report List**, the appropriate criteria fields appear in the **Report Criteria Window**.

- Choosing criteria for **IDTS Client Profile** consists of selecting the client from a list of available clients displayed in the **Report Criteria Window**.
- Choosing criteria for **IDTS Assessment Listing** consists of setting a range of dates using the controls displayed in the **Report Criteria Window**.

IDTS CLIENT PROFILE SAMPLE

Figure 35 depicts a sample of the IDTS Client Profile report.

Figure 35: IDTS Client Profile Report



FASTIDTS ASSESSMENT LISTING SAMPLE

Figure 36 depicts a sample of the *FastIDTS Assessment Listing* report.

Figure 36: FastIDTS Assessment Listing Report

FastIDTS Assessment Listing					rptFISum
Report Summary					
Report Date:	8/9/2004				
Report Period:	8/1/2004 to 8/9/2004				
Site Name:	Test				
Position #:	1				
Total Clients:	6				
Total Assessments:	11				
Source - Location					
Assessment Date	Name	Assessment Count	IDTS ID	MDOC	
Comm. Corr. - Aub					Total Assessments: 5
8/3/2004	TEST, TEST TEST TEST	3	7		
	TEST, TEST TEST TEST	2	6		
Comm. Corr. - Ban					Total Assessments: 1
8/3/2004	TEST, TEST TEST TEST	1	8		
Comm. Corr. - Rum					Total Assessments: 5
8/7/2004	TEST, TEST TEST JR	1	11		
	TEST, TEST TEST JR	1	10		
8/8/2004	TEST, TEST TEST	3	12		

PRINTING / VIEWING IDTS CLIENT PROFILE

Figure 37 indicates the steps to view or print the **IDTS Client Profile** report:

Figure 37: View / Print the IDTS Client Profile Report

Step 1: Select IDTS Client Profile

Step 2: Select Client Profile Criteria.

Step 3: Select Print or Preview.

Step 4: Click Run Report.

Client	MDOC	DOB	Sex	ID	CreateDate
TEST, TEST		4/7/1952	M	12	8/8/04 22:57
TEST, TEST		1/3/1949	F	11	8/7/04 23:16
TEST, TEST		8/1/1963	M	10	8/7/04 23:11
TEST, TEST		1/14/1956	F	9	8/3/04 18:21
TEST, TEST		12/31/1974	M	8	8/3/04 17:26
TEST, TEST		12/31/1974	M	7	8/3/04 17:26
TEST, TEST		8/4/1964	M	6	8/3/04 17:17

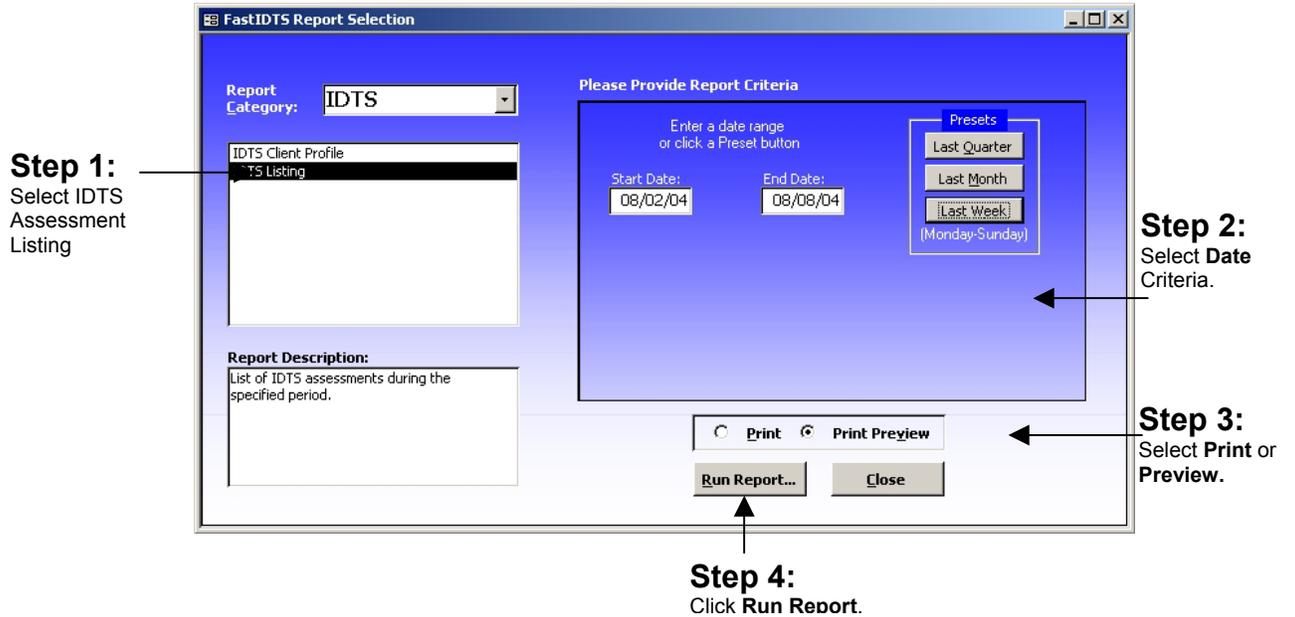
As depicted in Figure 37, the four steps to running the **IDTS Client Profile** report are as follows:

1. Select the **Report Name**
2. Select **Client Criteria** for the report
3. Choose **Print** or **Print Preview**
4. Click **Run Report**

PRINTING / VIEWING IDTS ASSESSMENT LISTING REPORT

Figure 38 indicates the steps to view or print the **IDTS Assessment Listing** report:

Figure 38: View / Print the IDTS Assessment Listing Report



As depicted in Figure 38, the four steps to running the **IDTS Assessment Listing** report are as follows:

1. Select the **Report Name**
2. Select **Date Criteria** for the report
3. Choose **Print** or **Print Preview**
4. Click **Run Report**

SELECTING DATE CRITERIA FOR ASSESSMENT LISTING REPORT

The Date Criteria feature is very flexible. To select a date range for the report:

- Manually enter a date range in the fields provided, or
- Select from one of the **Date Preset** buttons on the right.

The **Date Preset** buttons allow you to automatically set the dates for the previous week, month, or quarter by clicking the appropriate button.



You may edit the date range fields after you have used the **Date Preset** buttons to set the range

DELETE CLIENT The **Delete Client** feature allows you to remove an IDTS assessment from the *FastIDTS* using the **ClientID** of the assessment. Follow these steps to delete a client using this feature:

1. Identify the **ClientID** of the assessment you wish to delete.
2. Click the **Delete Client** button on the **Administration Menu**
3. Enter the **ClientID** for the assessment you wish to delete.
4. Click **OK**.

SYSTEM SETTINGS The **System Settings** section of the *FastIDTS* Management Module provides a means to manage the following:

- Assessment **login password**
- **Site Name** and **Position Number**
- Lists for **Client Sources**, **Screening Locations**, and **Sources and Locations**



Warning! Changing certain **System Settings** can have serious consequences for *FastIDTS* operations. Please talk to your support staff before making any changes in this area of the *FastIDTS* Management module.