

Gnosis ADAPT Process & Reports

May 2019 Webinar

Updates & Additions

- New ADAPT Fields for ***Sexual Orientation***
 - Release email (sent April 30) outlines required steps for adding and mapping this new attribute list.
 - This new demographics section is already included in the Data Quality Report V2.3 and ADAPT Report V2.13

- New ***Gender*** list values
 - Values already added to your system and included in the Data Quality Report V2.3 and ADAPT Report V2.13

Updates & Additions (continued)

- *Data Quality Report now contains all demographic fields.*
- ***Did not disclose*** Response Data
 - New value included in all demographics sections within ADAPT Report V2.13.
 - This is the only non-response value being requested by CSC HQ.
 - All first time attendees in a quarter who are not set with a mapped value in any demographic list will be added and displayed in the *Did not disclose* field of the appropriate demographic list.

Updates & Additions (continued)

- ***Total Snail Mail and Email Addresses, Total Records*** Requests
 - Updated definitions from CSC HQ have provided clearer guidance for our formulas which has resulted in changes in all three of these fields in the Gnosis ADAPT Report V2.13.

Snail Mail Addresses in Database

Number of active, physical donor mailing addresses in affiliate database. This should be a non-duplicative count & **should not include inactive or deceased records**. This number can include unique mailing addresses of corporate/organizational contacts.

E-mail Addresses in Database

Number of active, physical e-mail addresses in affiliate database. This should be a non-duplicative count & **should not include inactive or deceased records**. This number can include unique email addresses of corporate/organizational contacts.

Total Records in Database

This should be a count of all **active records that have either or both a snail-mail address and an email address**. These records can be **donors and non-donors and corporate/organizational and non-corporate/non-organizational contacts** as well.

Updates & Additions (continued)

- ***Person From*** date is no longer needed for report calculations, however, it is still a highly recommended field to maintain for multiple purposes.
 - *Period From* date is the only immediate visual in a record identifying the start date of any relationship and is also now included in the Data Quality Report.

Report Clarifications – ADAPT V2.13

- You must click the ***Calculate Sheet*** button three times when the report first opens, as outlined in the Gnosis ADAPT Reference article.
- ***Disabled events*** are included in program count numbers; only ***Canceled events*** are excluded.
- **Kiosk Resources** – CSC HQ has confirmed that Kiosk Resources should not be included in ADAPT totals.

Report Clarifications – ADAPT V2.13

- **Medical professionals and other non-Support/Patient persons** are not to be counted as *Participants* or *Support People*.
 - Records should only be entered as *Verified General Public*.
 - Track these individual using Role Attributes – many systems now have a *Community Roles* multi-select list attribute.
 - Can be checked-in for event attendance and will be included in total visit counts.

If you currently have a Medical/Health Professional *Participant Type* on your Member/Participant Attribute tab, use the guidance in the April 30 Release email to undo the ADAPT token mapping for the list value.

Additional Info from CSC HQ – Miranda Johnson

- Updates to Donor Database definitions
- Exclusion of non-program Kiosk Resources
- Proper tracking of medical professionals and other community partners

Affiliate Question 1

QUESTION

Does the report account for incomplete data? For example, if we have member profiles that don't have age/gender/ethnicity/etc. populated, will those members still be included in the totals per the ADAPT report?

ANSWER

YES. All persons served are included in all applicable areas of the full ADAPT Report. The Data Quality Report will confirm who is included and what info is missing.

Reminder that the Quality Report should be run first to identify missing data, allowing you to update necessary records before running the full ADAPT report.

Affiliate Question 2

QUESTION

When someone is marked as a volunteer in an event, are they counted in ADAPT as attending the group? Is it counted as a visit?

ANSWER

If a person is checked in to an event as a volunteer, their attendance to the event is not included in the total visit count.

The screenshot shows the ADAPT software interface. At the top, there is an 'Add Attendee' form with a search bar and buttons for 'Bulk Add' and 'Import from event history'. Below the form is a table of attendees. The first row shows 'Krizan, Kristina' with the following details: Guest (unchecked), In Person (checked), Check In (5/28 10:30 AM), Check Out, Duration (01:00), CEU1, CEU2, CEU3, Reg Cat, Vol. (checked), Reg. (unchecked), Dupe. (unchecked), and a close button (x). A red arrow points to the 'Vol.' checkbox.

Attendee	Guest	In Person	Check In	Check Out	Duration	CEU1	CEU2	CEU3	Reg Cat	Vol.	Reg.	Dupe.	
→ Krizan, Kristina	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5/28 10:30 AM		01:00					<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	x

Affiliate Question 3

QUESTION

Where does the cumulative members/participants # come from? Does it include 'inactive' and 'deceased' or only 'active' participants.

ANSWER

Members/Participants service is calculated by *Record Status* and either attendance data or Contact Management entries.

Record Type (Active/Inactive/Deceased) is not a factor in this count as even if a person becomes inactive or passes away during the period served, they were still served and therefore included in the unduplicated count.

Affiliate Question 4

QUESTION

Is there a time period when someone becomes "new" again? If someone has not been here for 2 years, 5 years, etc? Or once they had come they are never "new" again.

ANSWER

CSC HQ has confirmed that reengagement in support services due to a change in a participant's situation does not need to be reported/included in your ADAPT numbers.

However, if desired you can opt to record this reengagement date for your own tracking purposes. You may opt to update the *Period From* date or add a new Member/Participant attribute.