



Reference Guide for Florida Department of Health Contract Agencies

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Executive Summary and Overview

For the past twenty years, HIV/AIDS prevention efforts have been effective in helping to slow the rate of the epidemic¹. To continue to improve upon these successes, it is critical that community partners are able to measure the effectiveness of their HIV prevention initiatives. The Program Evaluation and Monitoring System (PEMS) is a tool that Health Department and Community-based Organization grantees can use to assess their HIV prevention strategies. PEMS was developed to strengthen the local capacity to monitor and evaluate CDC-funded HIV prevention programs administered by the Division of HIV/AIDS Prevention (DHAP).

PEMS (Program Evaluation and Monitoring System) is:

- A national data reporting system.
- An internet, browser-based software designed to monitor and evaluate HIV prevention programs.
- Supported by a standardized procedure to collect, report, and analyze data.

Use of this Document


These materials are intended for PEMS Users at agencies receiving Centers for Disease Control and Prevention (CDC), Division of HIV/AIDS Prevention (DHAP) funds from the Florida Department of Health (FL DOH).

¹ HIV Prevention Now More than Ever. (Centers for Disease Control and Prevention; National Center for HIV, STD, and TB Prevention.; Division of HIV/AIDS Prevention, 2001).

Obtain a Digital Certificate(s)

The **Secure Data Network (SDN)** is a secure gateway to PEMS-related activities. The **digital certificate** is an electronic “pass” to access the SDN. The SDN then allows access to PEMS which has its own unique username and password. Each PEMS user must have his or her own digital certificate to access the PEMS system.

< Action Step

Activity		Responsible Individual
1.	<p>The FL DOH PEMS Implementation Coordinator will complete one “Digital Certificate Letter Template” to request a digital certificate for anyone at the agency who will need access to PEMS.</p> <p>The FL DOH PEMS Implementation Coordinator will receive an e-mail from CDC (Secure Data Network <cdcsgn@cdc.gov>) with instructions to complete the digital certificate enrollment process and will forward the e-mail to the agency.</p>	FL DOH PEMS Implementation Coordinator
2.	The new PEMS user will complete the digital certificate enrollment process at his or her computer workstation.	New PEMS User
3.	<p>Follow the instructions in the e-mail and access the enrollment site to download the digital certificate: https://ca.cdc.gov.</p> <p>Contact FL DOH PEMS Implementation Coordinator for the password:</p> <p>Contact info here</p>	New PEMS User
 REMINDER	1. <i>When completing the digital certificate enrollment, you will be asked to select an activity. Select “PEMS Training”, “PEMS Software” and “Upload PEMS”.</i>	
	2. <i>Users must reapply every year for a new digital certificate. It is not necessary to submit the digital certificate letter template if the user is reapplying for a digital certificate and the Digital Certificate Letter is on file. Rather, directly access the enrollment site to download the digital certificate: https://ca.cdc.gov.</i>	

Obtain a PEMS Username and Password

The FL DOH Implementation Coordinator will assign each user at the agency a PEMS username and password. The Implementation Coordinator will also be responsible for the following:

- Managing agency access to PEMS
- Assigning PEMS user passwords
- Resetting PEMS users passwords
- Revoking access to PEMS
- Disseminating PEMS-related information to agency
- Training agency on PEMS

Please contact the FL DOH PEMS Implementation Coordinator for more information:

Contact info here

Review “Rules of Behavior (ROB)” and Submit to Florida Department of Health

The Rules of Behavior provides PEMS users with guidelines related to security when accessing PEMS data and web-based reporting.

< Action Step

Activity	Resources	Location
Each PEMS User should sign and date Section 5, “Acknowledgement and Agreement of Rules of Behavior for PEMS Agency Users” of the “ Rules of Behavior for PEMS Agency Users ” document and return via email to: Contact person here	Rules of Behavior for PEMS Agency Users	<i>PEMS Informational Website: PEMS Security/Rules of Behavior for PEMS Agency Users</i>

When Logging in...

- Do not click the browser back button. It will exit PEMS.
- **If you fail to login three times, the software will lock you out.** After two failed attempts, close the browser and open a new browser. You will get three new attempts.
- On the “Home” screen, you will see incomplete intervention sessions. Click the “View” link next to the specific incomplete intervention to see what has yet to be completed.

Searches...

- When using wildcard search function, the searches use up to the first 4 letters – more than that will not work.

User Information...

- New PEMS users must change their password the first time they login.
- For a user to change his or her password, refer to the bottom of the page and click “User Profile.”



- Click the “Change Password” link and follow the instructions.

When Entering Site and Worker Information...

- When adding a new site go to **Agency Information > Sites > Maintain Sites > Add Site Details**. Make sure that you click the site "Is Active" button. Regularly monitor that the correct sites and workers are active.

Add Site Details

Enter New Site Information

Site Name of Service Delivery: *	<input type="text"/>
Site Type: *	<input type="text"/>
Legacy Site ID:	<input type="text"/>
Street Address 1:	<input type="text"/>
Street Address 2:	<input type="text"/>
City:	<input type="text"/>
State: *	<input type="text"/>
County: *	<input type="text"/>
Zip Code: *	<input type="text"/> (#####-####)
Phone Number:	<input type="text"/> (#####)
Fax Number:	<input type="text"/> (#####)
Email:	<input type="text"/>
Contact First Name:	<input type="text"/>
Contact Last Name:	<input type="text"/>
Use of Mobile Unit:	<input type="text"/>
Is Active:	<input type="checkbox"/>

- Enter the sites before you enter the workers.** When you add workers you need to select the site(s) where they work.
- If "Community Setting" is selected as site type, you **must select** whether a "Mobile Unit" was used on the site. Otherwise, leave "Mobile Unit" blank.
- A site is defined as any location where prevention services are delivered. If an agency has multiple sites of the same site type within the same zip code, these sites can be as one site.
- For workers, ensure that their end dates correspond to the end of the contract.
- You cannot delete a "Worker," "Site," or a "Program" if they have been associated with any other record.
- A worker's start and end date determine whether a worker is active.

When Entering Program and Planning Information...

- Add “Additional Target Populations” before you set up “Programs” if you are serving a target population that has not been included in the community plan.
- Health departments enter Community Plan data annually. If the HD has not entered the community plan data, when choosing a community plan year you will receive an error. If this happens, contact the FL DOH PEMS Implementation Coordinator.
- Create “Program”, “Program Model” and “Intervention annually based on the funding year. The funding year is determined by the state funding. “Program Models” for FL DOH contract agencies are on a January through December calendar.

When Entering Client-Level Information...

- When completing demographics for the first time for a client, you can add the “Locating Info” but you can only view it later through the Locating Info Sub-Module.
- To change clients, look on the right of the “Client Information” results.

Last Name	First Name	Local Client ID	PEMS Client Unique ID	Date of Birth	Change Client
Marmalade	Orange	50558	50558	--/--/1974	View Demographic Details

- You cannot delete a client.
- If you mistype something under “Demographics,” the system will not let you delete the record. You will need to edit the record under the Demographics Sub-Module.

When Entering Referral Information...

- To update a referral, search for the client record and select the Referrals Sub-Module.
- Referrals are defaulted to “Lost to Follow-up” after 60 days.
- Referral codes are generated under reports. Generate enough so field staff members have easy access and ample referral numbers available.
- When printing referral labels use Avery Labels 5262 1.33” X 4” or its equivalent. You may need to reduce your printing margins to 0.5” for the labels to print correctly.

Annual Updates
Digital Certificates:
Digital Certificates expire after one year. PEMS users should reapply for a new digital certificate annually. Once you reapply for a certificate, the old certificate is no longer valid and you will be unable to access PEMS until you have the new digital certificate loaded on your computer.
To check the expiration date of a digital certificate:
<ul style="list-style-type: none">On your Internet Explorer browser select: Tools → Internet Options → Contents tab → Certificates → Personal tab
<i>Note: You can see the expiration date from the main screen of the personal tab or you can click on the individual certificate and see the valid dates.</i>
Program Information:
Program:
<ul style="list-style-type: none">On “Maintain Program” screen [via Program Details], add new “Program”, “Program Model” and “Interventions” information for each funded program. [Note: use “Program Model Templates” if created and edit as needed.]

Information to be Updated as Needed
Agency Information:
Agency Details:
<ul style="list-style-type: none">Located in “Edit Agency Details”: Address, website and agency contact must be maintained.
<i>Note: The following CANNOT be changed: Agency name, EIN and DUNS, agency type, funding status and jurisdiction.</i>
Workers:
<ul style="list-style-type: none">Located on “Maintain Workers” screen: Add new workers, change date of current workers to inactive, edit training information, and site of service delivery.
Sites:
<ul style="list-style-type: none">Located on “Maintain Sites” screen: Add new sites, edit existing sites: contacts, active status, and use of mobile van.
Network Agencies:
<ul style="list-style-type: none">Located on “Maintain Network Agencies” screen: Add new agencies, delete existing agencies, and edit agency information.

Florida Department of Health

For any PEMS related questions, you may contact FL DOH PEMS Implementation Coordinator including:

- Access to PEMS
- PEMS data entry
- Required variables
- Data collection
- Data submission

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National HIV Monitoring and Evaluation Service Center

- Reporting PEMS system issues
- SDN performance-related issues

For PEMS Technical Support - NHMESC (National HIV M&E Service Center)

Phone: (888)PEMS-311 **Email:** pemsservice@cdc.gov
(888) 736-311

The National HIV M&E Service Center supports HIV prevention grantees with the collection, use, and submission of national monitoring and evaluation data.

PEMS Informational Website

- The PEMS informational website is a good resource to access training materials, recent communications, documents, contact information, and “Frequently Asked Questions” regarding PEMS software.
- **The PEMS informational website is separate from the PEMS software** and is not accessed through the Secure Data Network (SDN). You do not need a digital certificate to access the PEMS informational website; however the PEMS website requires a password.

HELPFUL HINT

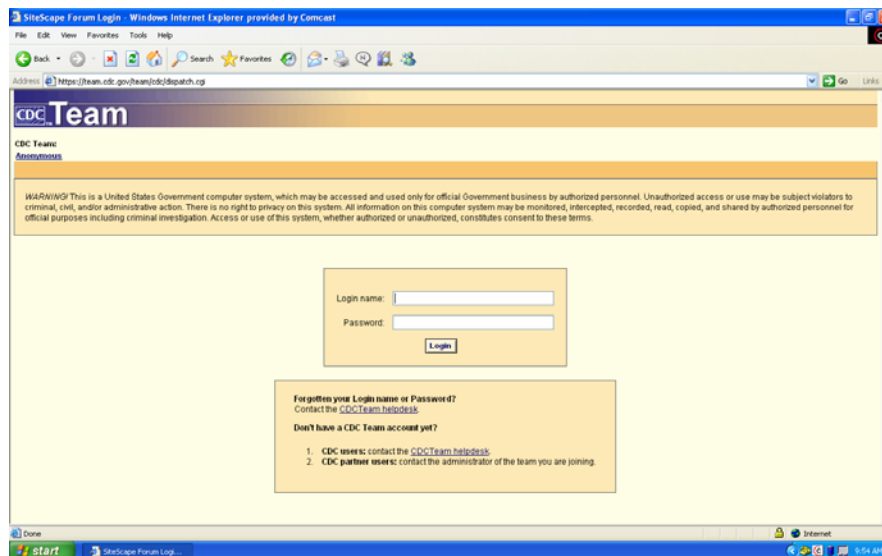
Follow the instructions below to login to the website for the first time. When you first login to the site, find your way to the “PEMS Workspace”.

< Action Step

PEMS INFORMATIONAL WEBSITE LOGIN INSTRUCTIONS

PEMS informational website: <http://team.cdc.gov>

The PEMS informational website is part of the CDC Team (SiteScope) website.



If you have never logged in to the PEMS informational website, send an email requesting access to the PEMS informational website with your name, email address and organization to ead2@cdc.gov.

Once this information is approved, an e-mail with login information for the PEMS informational website will be sent.

Resource Documents

Resource	Availability
<p>✓ PEMS User Manual <i>Describes the functionality of PEMS. Provides step-by-step instructions to navigate through the PEMS software.</i></p>	<p>PEMS Informational Website: <i>Trainings Folder- PEMS User Manual Folder- Final PEMSUserManual-Apr2008.pdf</i></p> <p><i>Click the PDF link and save the file once it has downloaded.</i></p>
<p>✓ PEMS Data Variables and Values (DVS) <i>Document that defines each variable in PEMS.</i></p>	<p>PEMS Informational Website: <i>PEMS Data Variables Folder</i></p>
<p>✓ PEMS Data Variables Dashboard <i>List of program required, system required and optional variables.</i></p>	<p>PEMS Informational Website: <i>PEMS Data Variables Folder</i></p>
<p>✓ Sample Data Collection HE/RR Templates <i>Sample PEMS data collection templates. Each template is available in two versions - one with all the CDC required variables and the other that contains the required variables with some suggested optional variables which may be useful for local monitoring and evaluation.</i></p>	<p>PEMS Informational Website: <i>Tools and Resources Folder - Data Collection Templates Folder</i></p>
<p>✓ Data Sharing Lesson Presentation and Data Sharing Quick Reference Guide</p>	<p>PEMS Informational Website: <i>Communications Folder -Conference Call Notes Folder-CPEMS Conference Call Notes Folder-CPEMS Call Presentation Materials Folder</i></p>