




# 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?

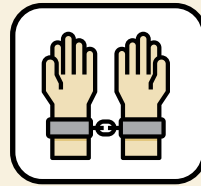
- KORTOS is a research study designed to measure changes for several key risk factors for adults who participate in Kentucky's opiate replacement treatment services using an evidence-based assessment.
- The study helps answer key questions posed by legislators, funding agencies, families, and clients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

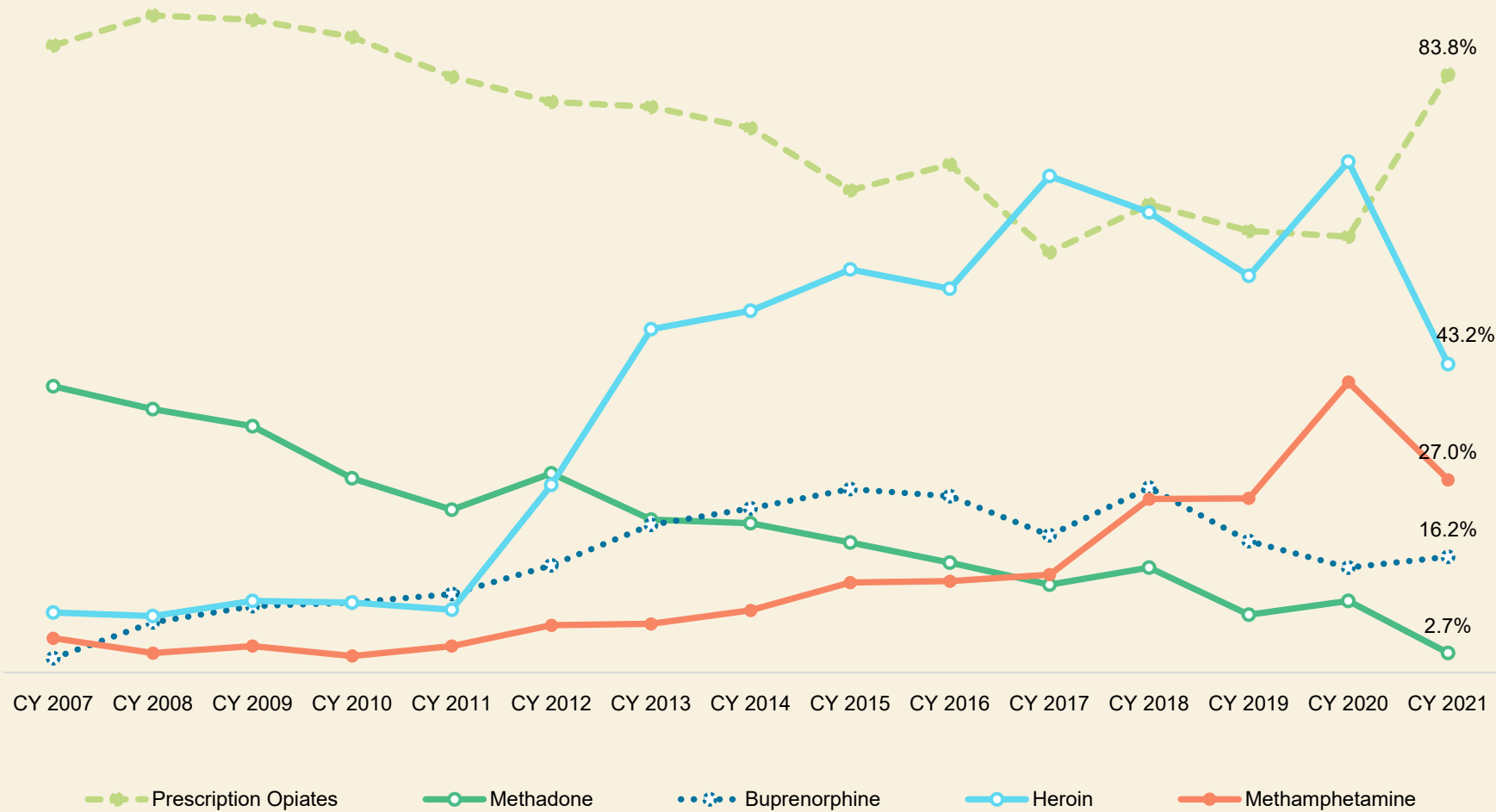
- The programs included in KORTOS are ones designated to participate by key state stakeholders
- Because the Kentucky legislature is asked to spend money on so many different things, it is important to collect evidence that programs actually achieve desired outcomes.
- Also, it is important to provide 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

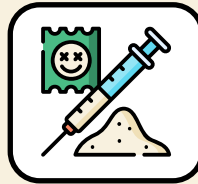
- KORTOS is a robust, pragmatic, reliable, and valid **evidence-based assessment** developed in Kentucky for Kentucky.
- The instrument is made up of **five core components** each with strong reliability and validity research support and three supplemental components, most of which have strong reliability 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



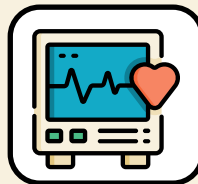
**WORST MENTAL  
HEALTH**

**5TH HIGHEST**  
IN THE NATION FOR



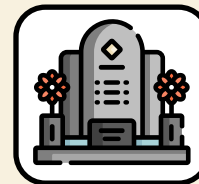
**SMOKING**

**2ND HIGHEST**  
IN THE NATION FOR



**MULTIPLE CHRONIC  
HEALTH CONDITIONS**

**4TH HIGHEST**  
IN THE NATION FOR



**PREMATURE  
DEATH**

**8TH HIGHEST**  
IN THE NATION FOR



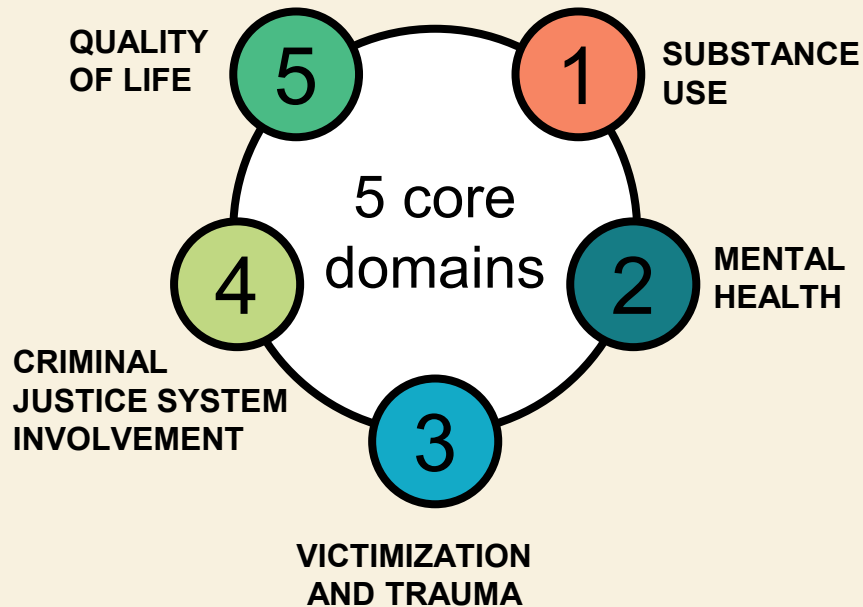
**FOOD INSECURITY**

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

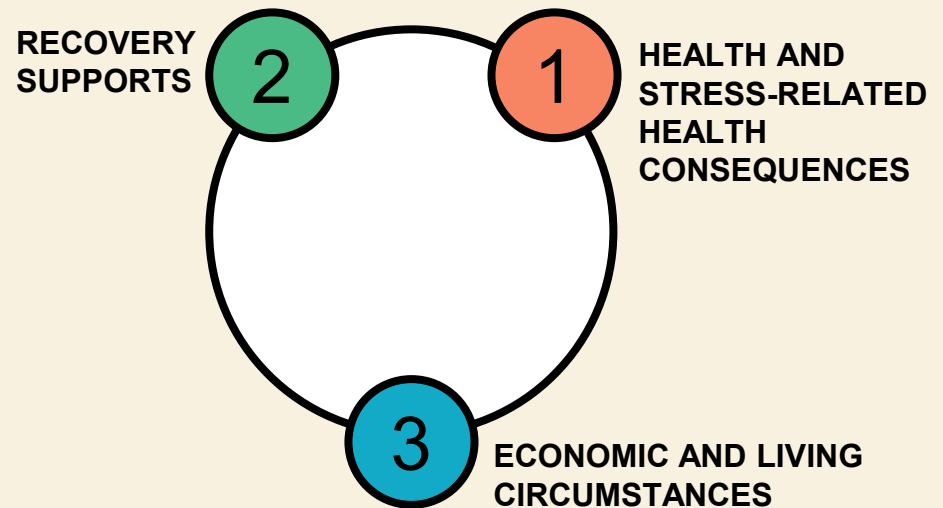


# Intake Interview Data: Key Elements

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

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## 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

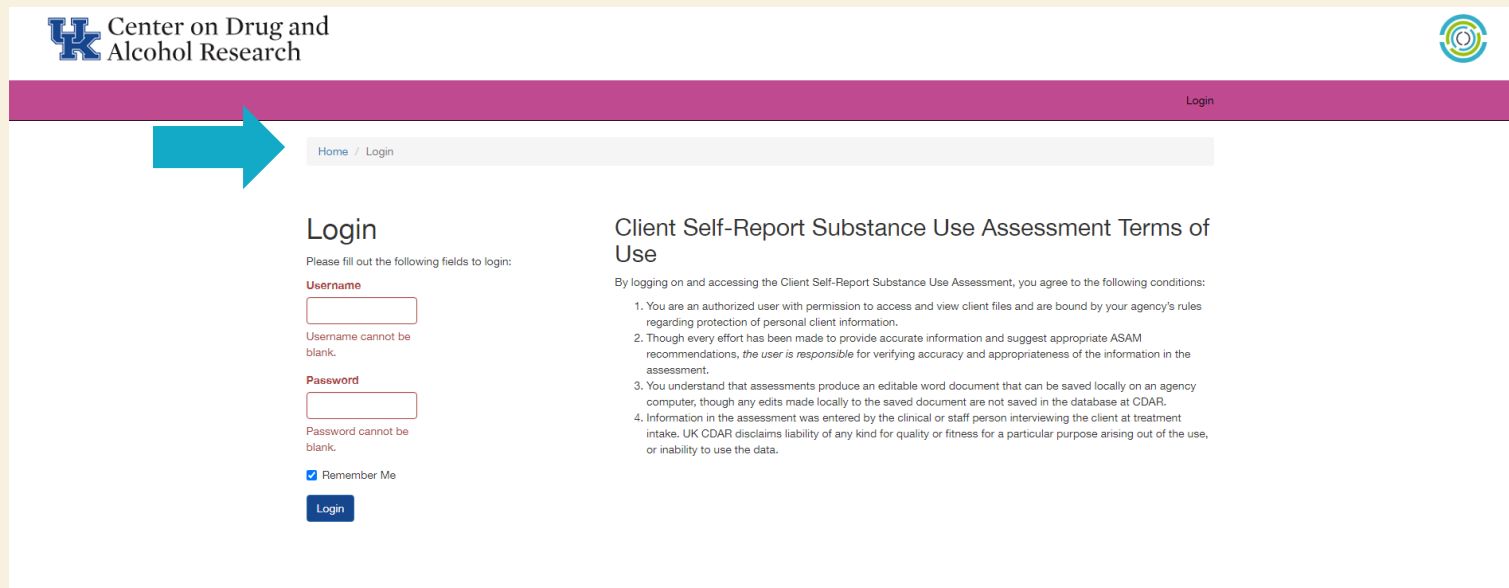
- A. Contact your Program Director who will assign you a user ID and password for your OTP site
- B. With your password/login ID you can now view the KORTOS Client Information System at <https://ukcdar.uky.edu/KORTOS>
- C. Log-in and add/view/edit clients and enter new intake interviews

# 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>



Center on Drug and Alcohol Research

Home / Login

Login

Please fill out the following fields to login:

**Username**

Username cannot be blank.

**Password**

Password cannot be blank.

Remember Me

Login

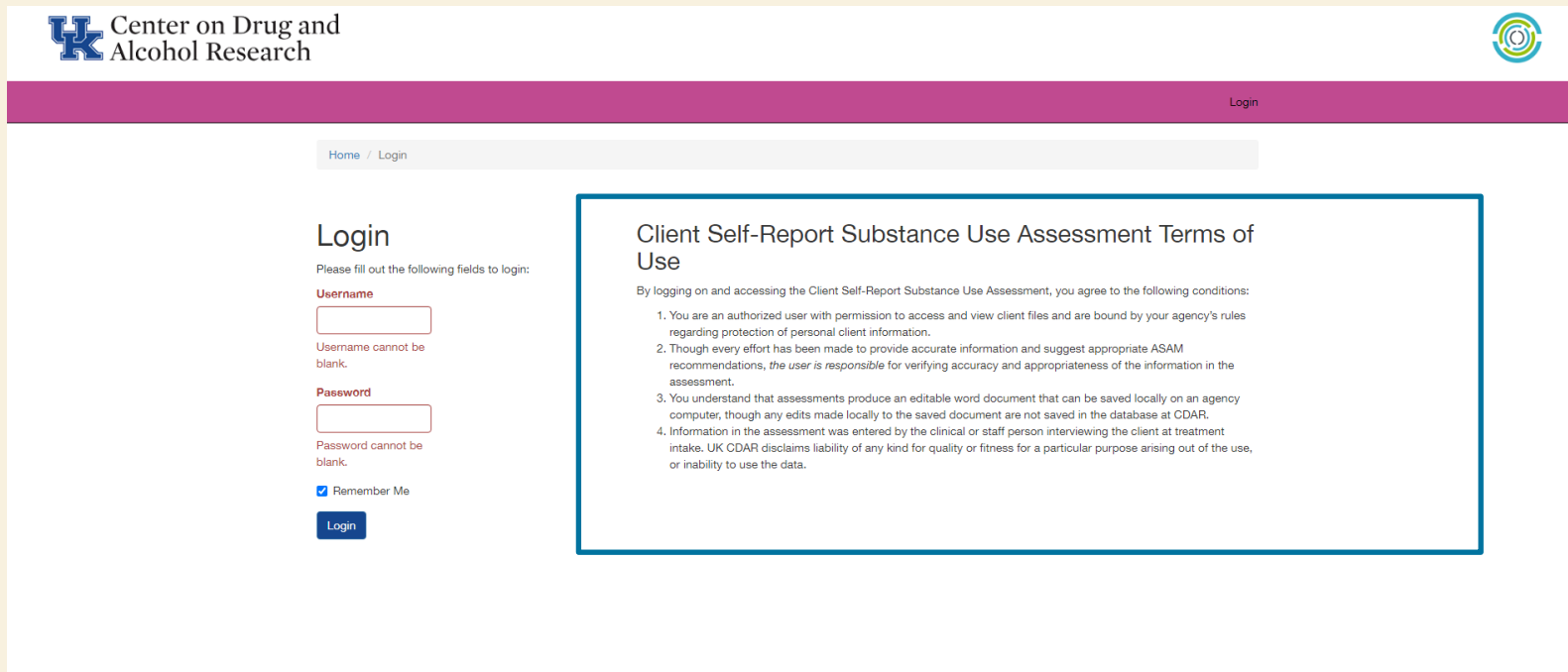
Client Self-Report Substance Use Assessment Terms of Use

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.

# 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.



The screenshot shows a web application interface for the Center on Drug and Alcohol Research. At the top left is the center's logo and name. At the top right is a circular logo and a 'Login' link. Below the header is a breadcrumb trail 'Home / Login'. On the left side, there is a 'Login' section with two input fields for 'Username' and 'Password', each with a 'cannot be blank' error message. Below the password field is a 'Remember Me' checkbox and a 'Login' button. On the right side, a blue-bordered box highlights the 'Client Self-Report Substance Use Assessment Terms of Use'. The terms state that by logging on, the user agrees 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)

Powered by  
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**.

The screenshot displays the KORTOS Client Information System interface. At the top left is the University of Kentucky logo, including the text 'UNIVERSITY OF KENTUCKY' and 'Center on Drug and Alcohol Research'. To the right, the system name 'KORTOS Client Information System' is shown. A navigation bar contains links: 'Client List', 'Create New Client', 'Mid-Level Report', 'User Management', 'Account Settings', 'Admin', and 'Logout (jmilller)'. A red arrow points to 'Create New Client' in the navigation bar, and a yellow arrow points to 'Create A New Client' in the 'Clients' section. The 'Clients' section also includes a link to 'Client List'. Below this is the 'Project Resources' section with links for 'PDF Interview', 'Consent Form', and 'More Information'. A green notification box titled 'Notifications & Alerts' contains the text: 'System Upgrades Complete', 'Published Date: 01/30/2015', and a message about scheduled upgrades and contact information for Job Messer. The footer contains development credits and the CDAR Records Display Platform logo.



# Client List View

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

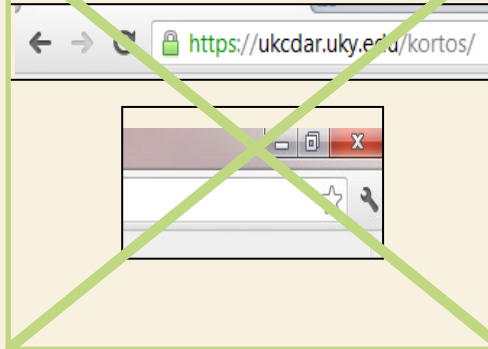
1. **Create New Clients**
2. **Submit a baseline**
3. **View a Report** after a baseline has been entered

The screenshot displays the KORTOS Client Information System interface. At the top left is the University of Kentucky logo and the text 'KORTOS Client Information System'. A navigation bar contains links: 'Client List', 'Create New Client' (highlighted with a red box), 'Mid-Level Report', 'User Management', 'Account Settings', 'Admin', and 'Logout (jmilller)'. Below the navigation bar is a breadcrumb trail: 'Home » Client List'. The main heading is 'All Clients'. Below this is a search instruction: '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.' There are five filter tabs: 'Advanced Search', 'Clients Needing Intake Interview', 'Active Clients', 'Discharged Clients', and 'Unassigned Clients'. The search form includes fields for 'First Name', 'Last Name', 'SSN', and 'Site'. Below these is a dropdown for 'Clients Assigned to Clinician' set to 'All Clinicians'. At the bottom of the form are 'Search' and 'Clear Filters' buttons. Three colored arrows (blue, green, purple) point to the 'First Name', 'Last Name', and 'SSN' fields respectively. A blue arrow also points to the 'Create New Client' link in the navigation bar.

# Client Information System Navigation Tips

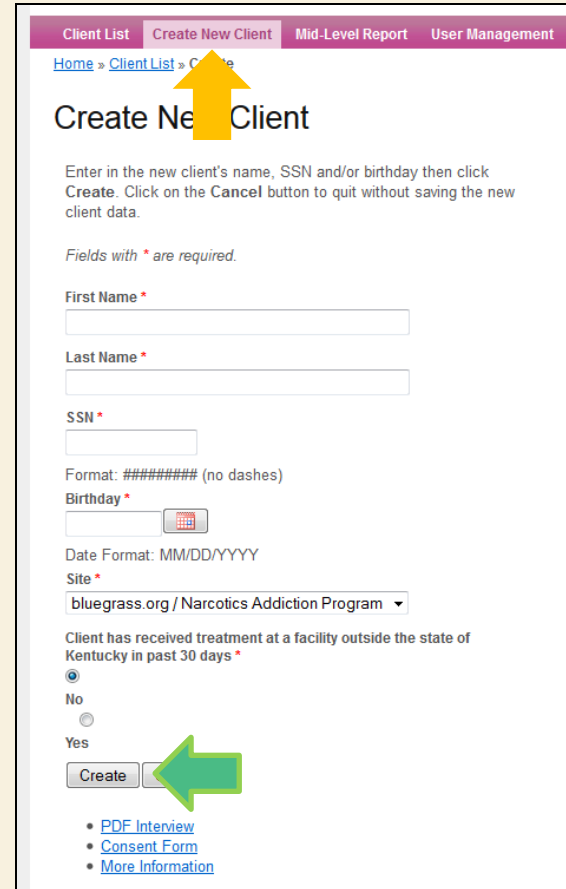
Use the buttons and links within the Information Screen to move between client lists, to create new clients, and to view or search for information.

Do NOT use the  
exits, or back arrows  
in your browser



# 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 a web application interface for creating a new client. At the top, there are navigation tabs: 'Client List', 'Create New Client', 'Mid-Level Report', and 'User Management'. Below the tabs, there is a breadcrumb trail: 'Home > Client List > Create New Client'. A yellow arrow points to the 'Create New Client' tab. The main heading is 'Create New Client'. Below the heading, there is instructional text: '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 states 'Fields with \* are required.' The form contains several input fields: 'First Name \*', 'Last Name \*', 'SSN \*', and 'Birthday \*'. The 'Birthday' field includes a calendar icon. Below the 'Birthday' field, the date format is specified as 'MM/DD/YYYY'. There is a 'Site \*' dropdown menu currently set to 'bluegrass.org / Narcotics Addiction Program'. A checkbox is labeled 'Client has received treatment at a facility outside the state of Kentucky in past 30 days \*', with 'No' selected. At the bottom of the form, there is a 'Create' button and a 'Cancel' button. A green arrow points to the 'Create' button. Below the buttons, there 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

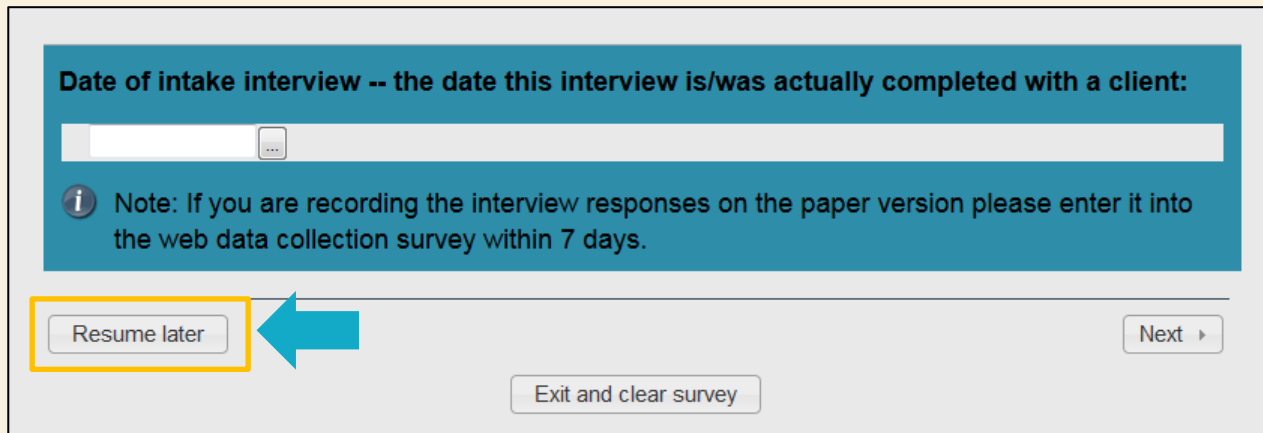
Clients Assigned to Clinician

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

Record Create Date	First Name	Last Name	SSN	Birthday	Site	Active	Action
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="#">Ryan</a>	<a href="#">Callahan</a>	333445555	03/21/1985	Paducah Professional Associates	✓	<a href="#">Enter Intake Interview</a>


# 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:**

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

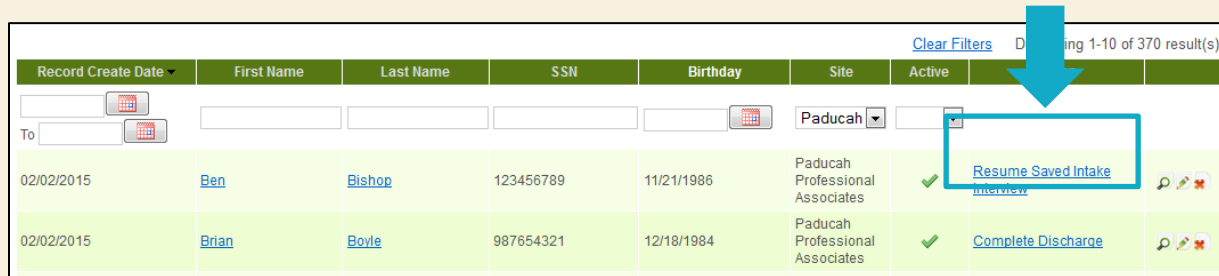
**Resume later** 

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.

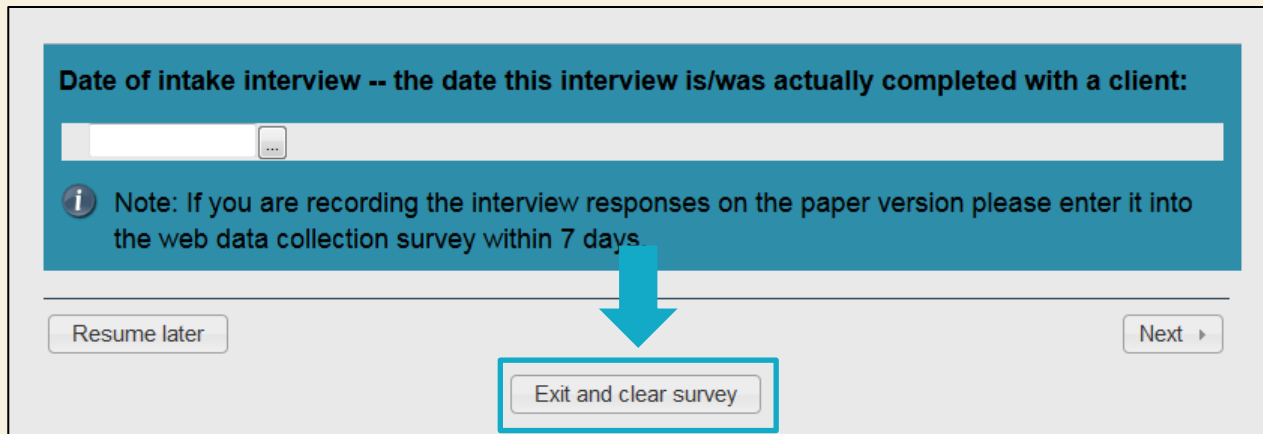


The screenshot shows a table with columns: Record Create Date, First Name, Last Name, SSN, Birthday, Site, Active, and a final column with action links. A blue arrow points to the 'Resume Saved Intake Interview' link in the first row.

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.



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

**i** 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

Exit and clear survey

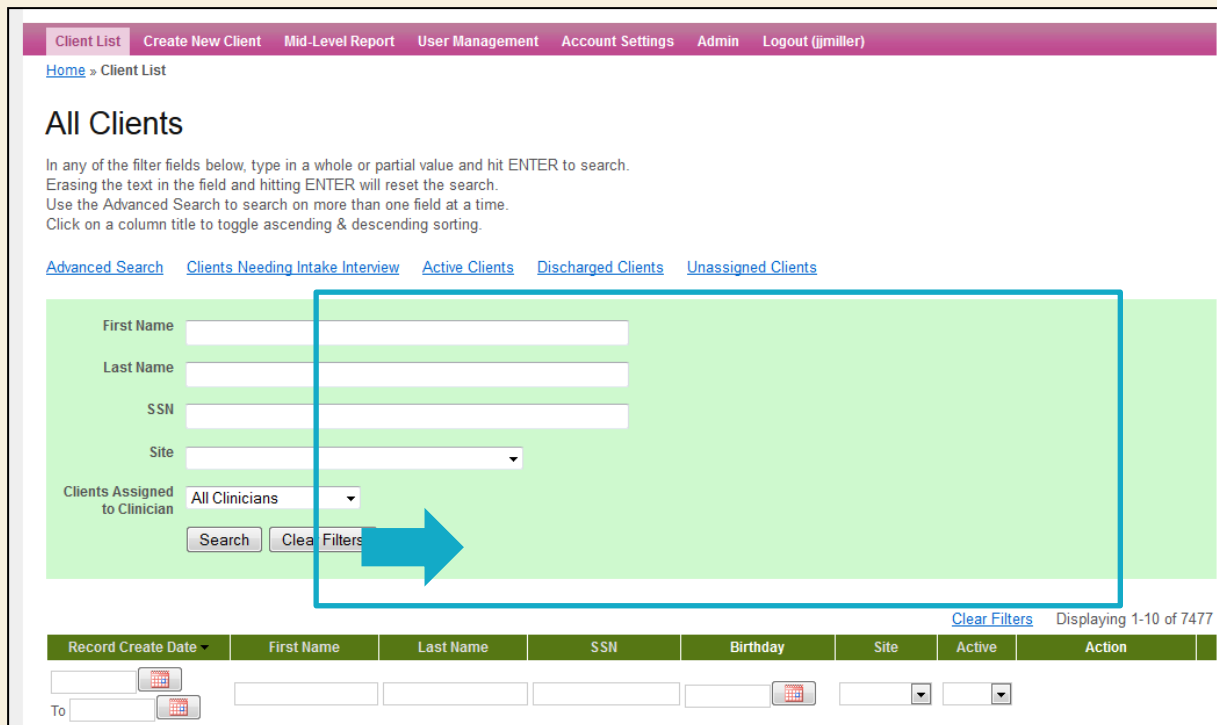
Next >

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

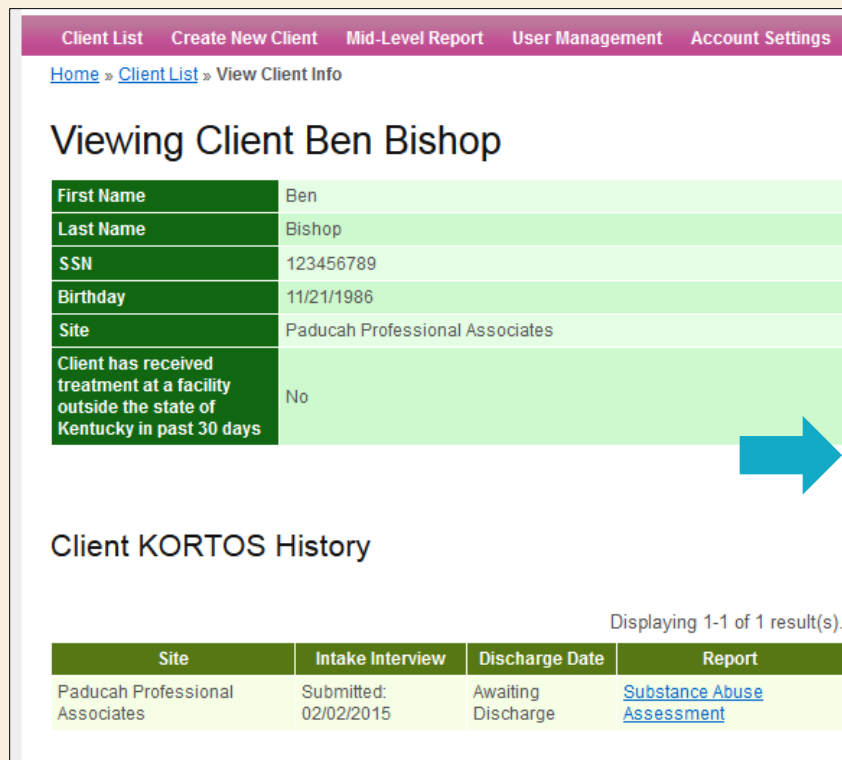
To **search** the system for a specific client, enter a first or last name, a SSN, or birthday and hit enter on your keyboard. You can also search for partial names or SSNs but you need a minimum of one letter in whatever field you want to search.



The screenshot shows the 'Client List' page with a search section highlighted in light green. The search fields are: First Name, Last Name, SSN, and Site (a dropdown menu). Below these is a 'Clients Assigned to Clinician' dropdown menu set to 'All Clinicians'. There are 'Search' and 'Clear Filters' buttons. A blue box surrounds the search fields and the Search button, with a blue arrow pointing to the Search button. The page also includes a navigation bar at the top with links like 'Client List', 'Create New Client', 'Mid-Level Report', 'User Management', 'Account Settings', 'Admin', and 'Logout (jimiller)'. Below the search section, there are links for 'Advanced Search', 'Clients Needing Intake Interview', 'Active Clients', 'Discharged Clients', and 'Unassigned Clients'. At the bottom, there is a table header with columns: Record Create Date, First Name, Last Name, SSN, Birthday, Site, Active, and Action. The table is currently empty, and the page indicates 'Displaying 1-10 of 7477'.

# 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, there 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".

The client information is presented in a table with green headers and light green rows:

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

A blue arrow points from the "No" response to the "Client has received treatment..." field towards the right.

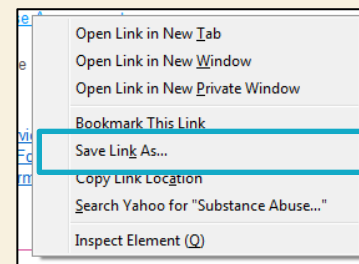
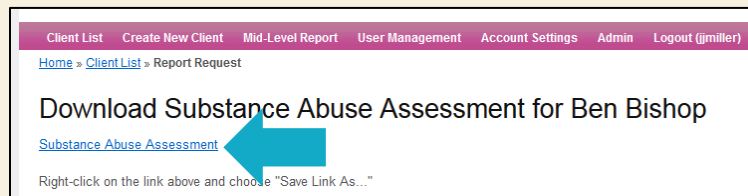
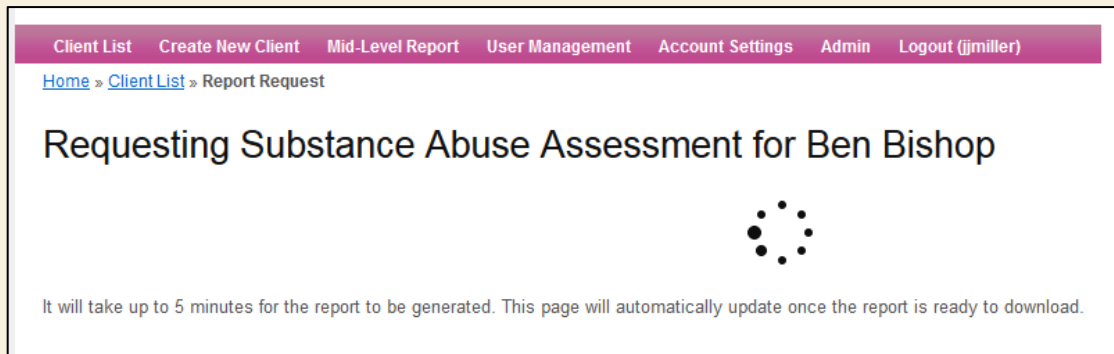
Below the client information is the section "Client KORTOS History". It indicates "Displaying 1-1 of 1 result(s)".

The history is shown in a table with green headers and light green rows:

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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KORTOS  
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.

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[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

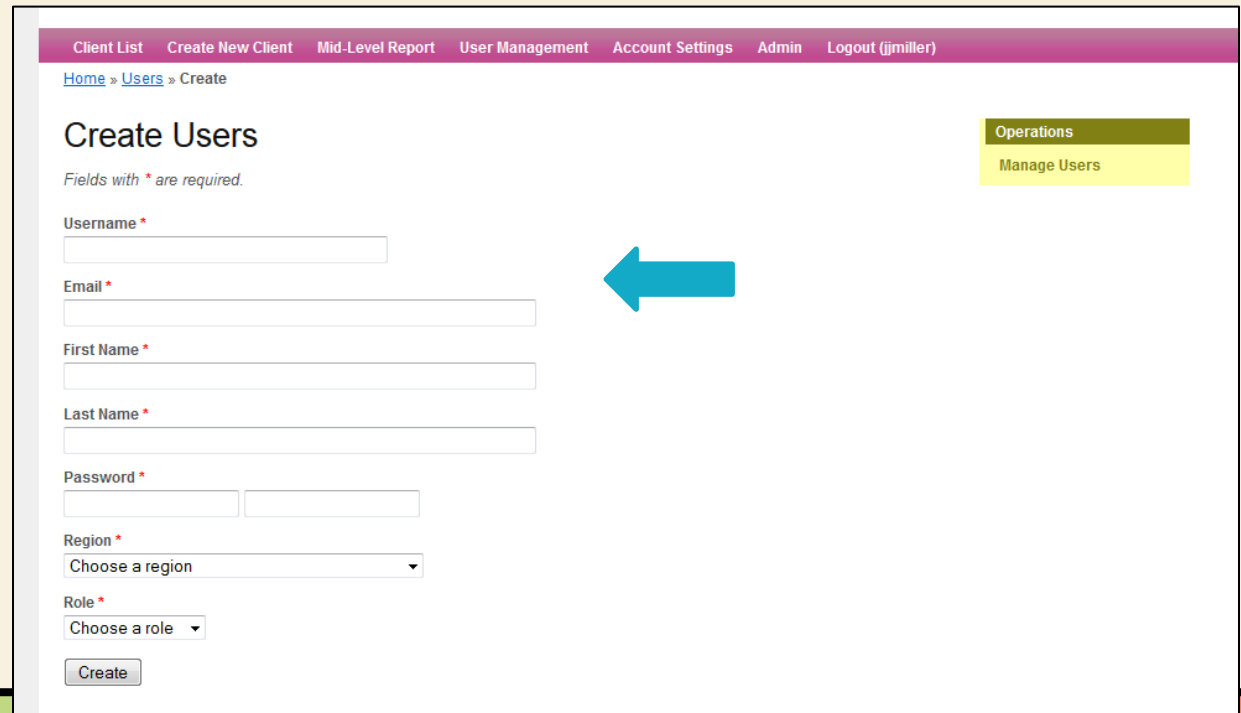
Clients Assigned to Clinician

# 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.

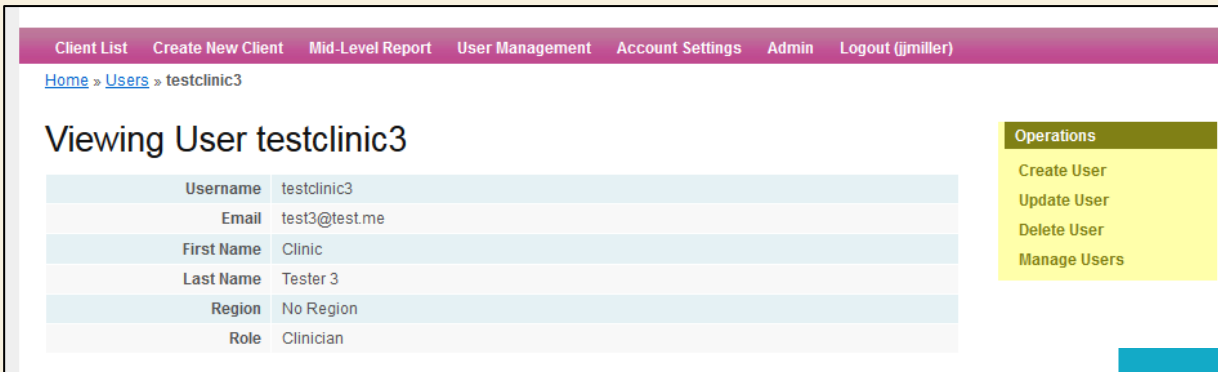


The screenshot shows a web application interface for creating users. At the top, there is a navigation bar with links: Client List, Create New Client, Mid-Level Report, User Management, Account Settings, Admin, and Logout (jmilller). Below the navigation bar, there is a breadcrumb trail: Home > Users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



# 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.



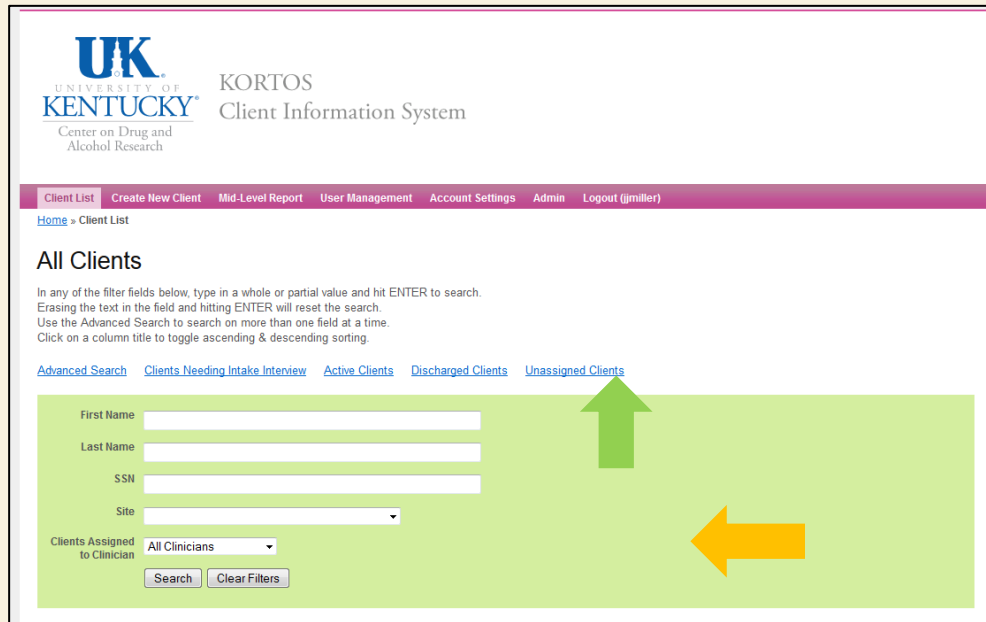
The screenshot shows a web application interface with a navigation bar at the top containing links for Client List, Create New Client, Mid-Level Report, User Management, Account Settings, Admin, and Logout (jmilller). Below the navigation bar, the breadcrumb path is Home > Users > testclinic3. The main content area is titled 'Viewing User testclinic3' and displays a table of user details:

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

To the right of the user details is an 'Operations' menu with the following options: Create User, Update User, Delete User, and Manage Users. A large blue arrow points from the 'Delete User' option towards the right side of the slide.

# 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 left is the University of Kentucky logo and the text "KORTOS Client Information System". A navigation bar contains links for "Client List", "Create New Client", "Mid-Level Report", "User Management", "Account Settings", "Admin", and "Logout (jmilller)". Below the navigation bar, the page title is "All Clients". A search instruction 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". The 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 currently set to "All Clinicians". There are "Search" and "Clear Filters" buttons. A green arrow points to the "Unassigned Clients" link, and a yellow arrow points to the "Clients Assigned to Clinician" dropdown menu.

# 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.

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

Home » Client List » View Client Info

### Viewing Client Ryan Callahan

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

Client KORTOS History

Site	Intake Interview	Discharge Date	Report
No results found.			

Operations

- Update Client Information
- View Clinician Assignments
- Enter Intake Interview

# 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.

The screenshot shows a web application interface for managing client permissions. At the top, there is a navigation bar with links: Client List, Create New Client, Mid-Level Report, User Management, Account Settings, Admin, and Logout (jmilller). Below the navigation bar, the page title is "Viewing Clinician Permissions for Client Ryan Callahan". A sub-header reads "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." Below this, there is a section titled "Clinicians Currently Able to View & Edit" with a table. The table has columns for Name, Type, Active Date, and an empty column. Two rows are shown: Gloria Young (gyoung) as a Site Admin [Sitewide Permission] with an active date of 2012-08-28 12:30:07, and Paducah Associates (jperry) as a Clinician [Assigned to Client List] with an active date of 2015-02-02 15:05:46 and a "Revoke" link. A green arrow points to the empty column header in the table. To the right of the table is an "Operations" menu with options: Update Client Information, View Client KORTOS History, and Enter Intake Interview. A blue arrow points to the "Enter Intake Interview" option. Below the table is a "Grant User Permissions" section with a "Select Clinician" dropdown and an "Add" button. At the bottom, there is a "Previous Clinician Access History" section with a table that has columns for Name, Type, Active Date, and Revoke Date. The text "No results found." is displayed below this table.

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

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.			

# 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](mailto:jeb.messer@uky.edu)

## **Programmatic or KORTOS Questions**

- TK Logan 859-257-8248 or [tklogan@uky.edu](mailto: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>**