

ImpactStar® Technical support

This page provides technical support on using the ImpactStar® tool. For support on using the tool with youth clients, see <http://impactstar.co.nz/training>



Log in

You need an account to use ImpactStar®. You will be provided with a username and password when you've completed the training modules. Email impactstar@ymca.org.nz for further support.

1. Access the ImpactStar® tool using the launch button at the top of this page: <https://ymca.teamdf.com/fmi/webd>
2. Enter your username and password, and click **Sign In**.

Set up a young person in Clients

It is best to set up a young person's profile when you meet with them for their first time. You need your youth client's consent to add more details than first and last name.

1. Click **Add Client...** at the bottom of the left sidebar. A pop up box will appear.
2. Fill in the information you have for your youth client. Fields marked with a red asterisk (*) must be filled in before you can continue.
3. Click **Create**. The youth client's profile will open to the details tab.
4. Click the **edit icon**  next to the Details heading to change the information.
5. Click the **edit icon**  next to Address, Contact Methods, or Relationships to add further information.

Access a youth client's record

1. Click your youth client's name in the left sidebar. You may need to use the search bar. Your youth client's profile will appear in the main window.

Record or view an interview with a young person

Record your interview as you talk to your youth client.

To start, Click the **Interviews** tab on the top menu bar.

To record an interview

1. Select the questionnaire that is appropriate for your youth client. For support choosing a questionnaire, see <http://impactstar.co.nz/questionnaires>
2. Click one of the numbered buttons to select your agreed answer to the first question. For more on discussing the questions with your youth client, see [Module 3: Using ImpactStar®](#).
3. Click the next question on the left sidebar to move on. ImpactStar® will save your answers as you record them. To pause partway through the interview, click **Return to Client...** in the top left corner.

The interview will be marked as "In Progress" and you will still be able to add or edit answers.

4. When you have completed the interview, mark it as complete. Click the status box near the top right of the window, and then click **Complete**.
5. Click OK to confirm the complete status. You won't be able to make changes after this.

To view or revisit an interview

1. If your youth client is enrolled in more than one programme, use the Filter by Programme field to limit the interviews shown.
2. Click the interview you want to view or revisit.
3. If the interview is still in progress, you may change the answers.
4. If the interview is completed, you won't be able to make changes.




View a young person's Star Chart

For help interpreting the Star Chart, see [Module 3: Using ImpactStar®](#)

1. Click the **Star Chart** tab on the top menu bar.
2. Select the programme you want on the right hand menu.

Add goals and life situation information for a young person

Use the **Profile** tab to record where a young person is at now and what they are working towards.

1. Click the **Profile** tab on the top menu bar.
3. Click the **edit icon**  next to the Information heading to add information about where your youth client is living, working or studying.
4. Click the **edit icon**  next to the Short Term Goals or Long Term Goals to add a goal that your youth client is working towards.
 - a. Click the **plus icon**  next to the Checklist heading in the pop up to add the individual tasks the youth client will try to complete.

Create an automated goals report for a young person or a group

You can create a PDF goals report for a youth client or a group, for their use or your records.

1. Click the **Profile** tab on the top menu bar.
2. Click **Goals Report** in the bottom right corner.
3. To create a goals report for just one you have selected, click **For this client only**.
4. To create a goals report for a group of youth clients, click **For all Cohorts**.
5. A PDF Goals Report will be created. Save it or print it.

Add demographic and funding information for a young person

Use the Funding, Programmes & Agencies tab to record which agencies are involved with a young person, and which funds they may be eligible for.

1. Click the **Funding, Programmes & Agencies** tab on the top menu bar.
2. Slide the tabs for categories that apply to your youth client.

Create or delete a progress report

Use progress reports to set goals with a young person. See the elearning module on Using ImpactStar® for more information on how to discuss these with youth clients.


To start, click the **Progress Report** tab on the top menu bar.

To add a report:

1. Click **New Report** in the bottom right corner.
2. In the **Report Date** field, select the date, if different from today's date.
3. In the **Mentoring Hours** field, enter the number of total mentoring hours you have spent with your youth client up to the date of the report.
4. In the **Community Hours**, enter the number of hours your youth client has spent in community programmes.
5. In the **Goals Achieved** field, enter information on what your youth client has achieved recently in the areas they are working on.
6. In the **Personal Development** field, enter information on how you and your youth client think they are going on their personal development.
7. All of the information will be automatically saved. Leave the tab or programme when you are finished.

Delete a progress report

You can delete any progress report, for example if you added it accidentally.

1. Click the **Progress Report** tab on the top menu bar.
2. Click on the report you want to delete in the Progress Reports menu.
3. Click the **rubbish bin icon**  on the right hand corner of the main window. You may need to scroll right to see it.
4. Click **Delete** to confirm the deletion.

Share your client list (youth managers only)

You can share your client list with a colleague to give them access to all of your clients.

1. Click your profile name in the top right corner.
2. Click **Share Clients...**
3. Select the colleague you want to share with from the dropdown list.
4. Click **Save**.

Add or delete files and notes for a client

You can add notes and files such as PDFs within ImpactStar®.

There are two places you can access these.

To access notes and files:

1. Click the **Dossier** tab on the top menu bar.

OR you can access notes and files from within an interview.

2. Click the **Interview** tab on the top menu bar.
3. Select or start a new interview (see above section: Record or view an interview with a young person).
4. Click the **Notes & Files** tab at the top of the left sidebar.
5. Existing notes will appear in the sidebar. Click to view.

To add a note:

1. Click the **Note** button at the bottom of the left sidebar.
2. Add a title in the title field.
3. Add your notes in the main text field.
4. All the information will be automatically saved.

To add a file:


1. Click the **File** button at the bottom of the left sidebar. An Insert pop up will appear.
2. Click **Choose File**. An Open pop up will appear. Choose the file you want to upload from your computer.
3. Click **Open**.
4. Click **Upload**.

To export a file:

You may want to get a file out of ImpactStar® at a later date.

1. Click the file you want to export in the left sidebar.
2. Click **Save** in the top right hand corner of the main window. You may need to scroll right to see it. An Export Field to File pop up will appear.
3. To change the name of the file as you export it, type a new name in the **Save As** field.
4. Click OK. A Download Files pop up will appear.
5. Click the button with the name of your file on it. Your file will download.
6. Click **Close** to exit the pop up.

To delete a note or file:

1. Click the note or file you want to delete in the left sidebar.
2. Click the **rubbish bin icon**  on the bottom right hand corner of the main window. You may need to scroll right to see it.
3. Click **Delete** to confirm the deletion.