

How to Transfer Your APR to PATNC



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In this tutorial, you will learn how to transfer your final APR to the Parents As Teachers Key Survey system.

From the Home page, click on "Admin" in the top navigation bar.

A screenshot of the Visit Tracker software interface. The top navigation bar is dark blue with the text "Visit Tracker TEST ENVIRONMENT" on the left and "Setup Admin Families Guardians Children Home Visitor Calendar Reports Support" on the right. The "Admin" link is highlighted with an orange circle. On the left, a sidebar menu lists various options like "Log Out", "Home Page", "New Family", "Export Data", "File Upload", "Data Quality Alerts", "Active Notifications", "Home Visitor Caseload", "Staff Events", and "Supervisions". The main content area has an orange header "Welcome APR Integration" and displays several sections: "Program Code: 073-106 Program Name: PAT APR Integration Tutorial", "Upcoming Private Contacts" (no contacts), "Upcoming Reminders (View all Reminders)" (no reminders), "Upcoming Screenings - click name to enter screening results" (no screenings), and "Upcoming Birthdays" (no birthdays). The footer contains copyright information for DataKeeper Technologies, LLC, links for License Agreement, Training Videos, and APR Integration, and a logo for Parents As Teachers National Center, Inc.

2 On the left, click "APR".

The screenshot shows the 'Administration' page in the Visit Tracker system. The top navigation bar includes 'Setup', 'Admin', 'Families', 'Guardians', 'Children', 'Home Visitor', 'Calendar', 'Reports', and 'Support'. The left sidebar contains 'Log Out', 'Home Page', 'APR' (highlighted with an orange circle), 'Home Visitor', and 'Caseload'. The main content area is currently empty.

3 This brings you to the APR Submission page.

The screenshot shows the 'APR Submission' page. The top navigation bar is the same as in the previous screenshot. The left sidebar now has 'APR' selected. The main content area displays the following information:

- PAT Affiliate ID:** 313
- Pcode:** 073-106
- Program Name:** PAT APR Integration Tutorial

Below this information is a section titled 'APR Submission' (highlighted with an orange circle) containing a note: "Note: Once your APR begins the review process please click [here](#) to access your APR through the portal to ensure an accurate status is displayed in that system." To the right of this note is a blue button labeled 'APR Submission Generator'.

At the bottom of the main content area is a table titled 'Submissions':

Program Year	Date Submitted	Status	KeySurvey URL

Below the table, there is a note: "If you need to make changes to your APR after submission, you can regenerate the updated numbers under **APR Submission Generator**. Then, visit your Key Survey link to **manually update** the data as needed."

4 To generate and review your APR, click "APR Submission Generator"

APR

PAT Affiliate ID 313
Pcode 073-106
Program Name PAT APR Integration Tutorial

APR Submission

Note: Once your APR begins the review process please click [here](#) to access your APR through the portal to ensure an accurate status is displayed in that system.

[APR Submission Generator](#)

Program Year	Date Submitted	Status	KeySurvey URL
If you need to make changes to your APR after submission, you can regenerate the updated numbers under APR Submission Generator . Then, visit your Key Survey link to manually update the data as needed.			

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5 Be sure to review the Instructions for transferring your APR to the Parents As Teachers National Center.

Reports - APR Submission

PAT Affiliate ID 313
Pcode 073-106
Program Name PAT APR Integration Tutorial
Consolidate No

Instructions for Submitting your APR to PATNC

1. Enter your program year reporting period and Site Fund Code (if applicable)
2. Click "Get Report" to generate the APR
3. Open and Review your numbers carefully for accuracy
4. Submit your APR to PATNC by clicking "Submit APR"
5. Finalize Submission: The PATNC Key Survey link will be available on the APR Submission page.
6. Click the URL to complete the process

Additional Notes:

- Only Home Visitors marked as "PAT Affiliate Home Visitor" in their profile will be included in the report.

Only one report is submitted by PAT Affiliate ID.

Date Range 05/16/2023 To 05/15/2024

Site/Fund Codes All Site/Fund Codes

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If your Affiliate has more than 1 Visit Tracker and each account has the same Affiliate ID, you will be able to submit a consolidated APR. Each account would be listed on the APR page and allow you to check each account that are to be consolidated in 1 report.

Since this tutorial does not cover the specifics on transferring a consolidated report, please reach out to Visit Tracker Support to help you with this feature.

Reports - APR Submission

PAT Affiliate ID 313
Code 073-106
Program Name PAT APR Integration Tutorial
Consolidate No

Instructions for Submitting you APR to PATNC

1. Enter your program year reporting period and Site Fund Code (if applicable)
2. Click "Get Report" to generate the APR
3. Open and Review your numbers carefully for accuracy
4. Submit your APR to PATNC by clicking "Submit APR"
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Additional Notes:

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Only one report is submitted by PAT Affiliate ID.

Date Range 05/16/2023 To 05/15/2024

Site/Fund Codes All Site/Fund Codes

7

Choose your report parameters.

2. Click "Get Report" to generate the APR

3. Open and Review your numbers carefully for accuracy

4. Submit your APR to PATNC by clicking "Submit APR"

5. Finalize Submission: The PATNC Key Survey link will be available on the APR Submission page.

6. Click the URL to complete the process

Additional Notes:

- Only Home Visitors marked as "PAT Affiliate Home Visitor" in their profile will be included in the report.

Only one report is submitted by PAT Affiliate ID.

Date Range 05/16/2023 To 05/15/2024

Site/Fund Codes All Site/Fund Codes

Email me when report finishes processing

Get Report Cancel

Pending reports
No pending reports.

Refresh



Reports ready to view
No completed reports


8 Click "Get Report"

Additional Notes:

- Only Home Visitors marked as "PAT Affiliate Home Visitor" in their profile will be included in the report.

Only one report is submitted by PAT Affiliate ID.

Date Range 07/01/2024  **To** 06/30/2025 

Site/Fund Codes All Site/Fund Codes 

Email me when report finishes processing

Get Report **Cancel**



Pending reports
No pending reports.


Refresh

Reports ready to view
No completed reports.

9 The report will be listed in the Pending reports.

Only one report is submitted by PAT Affiliate ID.

Date Range 05/16/2023  **To** 05/15/2024 

Site/Fund Codes All Site/Fund Codes 

Email me when report finishes processing

Get Report **Cancel**

Pending reports
APR Submission 5-30-2025 12-16-55 PM

Refresh

Reports ready to view
No completed reports.

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Once ready, you will see the report in the Reports Ready To View section. Click on the document icon to open the APR.

Email me when report finishes processing

[Get Report](#) [Cancel](#)

Pending reports
No pending reports.

[Refresh](#)

Reports ready to view [Delete Multiple Reports](#)

Show 10 entries Search:

Report	Requested date	Date Range	Programs	Site	Open Report	
APR Submission	5/30/2025 12:16 PM	7/1/2024 to 6/30/2025	073-106 PAT APR Integration Tutorial	All S		<input type="checkbox"/>

Previous 1 Next

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The highlighted items are the ones that will be sent to Key Survey.

Ready to send to PATNC Key Survey

[Submit APR](#) [Download APR CSV](#)

I. Organizational Design

C. Staffing

C1		Staff at Beginning of PY: Please indicate the number of staff employed as parent educators at the beginning of the 2024-2025 program year (include supervisors who carried a caseload in these counts):
		Visit Tracker Notes: Counts home visitors with at least 1 private contact - including deactivated - that do not have an End Date prior to the reporting period and have data entered for "Hours Per Week" and/or "FTE" on their data page. If entries for these 2 fields conflict containing both part time and time data, the home visitor will be counted as full time.
	C1a	Full-Time PEs Start of PY: How many parent educators (including supervisors who carried a caseload) provided parent educator services full-time (greater than .5 FTE) at the beginning of the program year? Full-time is defined as more than 20 hours per week.
	C1b	Part-Time PEs Start of PY: How many parent educators (including supervisors who carried a caseload) provided parent educator services part-time (FTE or less) at the beginning of the program year? Part-time is defined as 20 hours or less per week.
C2		Staff Changes: Please report on staffing changes that occurred during the 2024-2025 Program Year:
	C2a	Newly Hired: How many parent educators (including supervisors who carried a caseload) were newly hired during the program year?
		Visit Tracker Notes: Home Visitors with a Hire Date in the date range will be counted including deactivated home visitors.
	C2b	Ended Employment: How many parent educators (including supervisors who carried a caseload) reported in I.C.1. ended their employment (either voluntarily or involuntarily) in your affiliate during the program year?
C3		Staff at End of PY: Please indicate the number of staff employed as parent educators as of the end of the 2024-2025 program year (include supervisors who carried a caseload in this count):
	C3a	Full-Time PEs End of PY: How many parent educators (including supervisors who provided parent educator services) provided parent educator services full-time (greater than .5 FTE) at the end of the program year? Full-time is defined as more than 20 hours per week.

12 Review your numbers before transferring.

Visit Tracker Note: Staff Events indicated as a Staff Meeting or Group Supervision are counted here.		
D6a	1.50	Average Staff Meeting Duration: How long, in hours, was an average staff meeting during the program year?*
Visit Tracker Calculation: Sum of hours for all events reported in D6 divided by the number of events reported in D6.		
II. Service Delivery - FAMILIES		
II 1	23	Families Served: In total, how many families did your PAT affiliate serve with at least one personal visit this program year? [This should match the s II2., II3. and II4.]
II 2	4	New Families / Families who enrolled within the time period of 3/3/2024 - 3/2/2025 NOTE: The date range displayed encompasses 120 days before the end of the previous PY and 120 days before the end of the current PY. Visit Tracker Note: Visit Tracker considers the latest enrollment period when counting new families.
II 2a	1	Previous year: How many families who had their first visit within the time period of 3/3/2024 - 6/30/2024 also had at least one visit during the prog year?
II 2ai	0	Exit before 120 days: How many of these families exited prior to reaching 120 days enrollment?
II 2aii	1	Enrolled at least 120 days: Subtract {II.2.a.i} from {II.2.a}. The total is:{II.2.a.ii}. This is the total who enrolled within the time period of 3/3/2024 - 6/30/2024 and remained enrolled for at least 120 days or longer. We will use this number for later equations.
II 2b	3	This year: Families who enrolled this PY. How many families had their first visit within the time period of 7/1/2024 - 3/2/2025
II 2bi	0	Exit before 120 days: How many of these families exited prior to reaching 120 days enrollment?
II 2bii	3	Enrolled at least 120 days: Subtract {II.2.b.i} from {II.2.b}. The total is:{II.2.b.ii}. These families both had their first visit this program year and reach 120 days enrollment this program year. (This is the total who enrolled within the time period of 7/1/2024 - 3/2/2025 and remained enrolled for at least 120 days or longer). We will use this number for later equations
II 3	4	End of Year Families: How many families had their first visit within the time period of 3/3/2025 - 6/30/2025? NOTE: These families had their first visit this program year and have not yet reached 120 days enrollment due to being enrolled at the end of the pr year.
II 3a	0	How many of these families exited prior to 7/1/2025?
II 3b	4	How many of these families did NOT exit prior to 7/1/2025?

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II 10b	0	Asian
II 10c	0	Black or African American
II 10d	0	Native Hawaiian
II 10e	0	Other Pacific Islander
II 10f	38	White
II 10g	1	Multi-racial (two or more races)
II 10h	0	Other
II 10i	0	Prefer not to report
II. Service Delivery - CHILDREN		
Visit Tracker Note - Children whose Current Education Status = Kindergarten will be excluded from this section.		
II 12	32	Children Served: How many children ages birth to kindergarten did your PAT affiliate provide at least one personal visit? (This should match the sum of II 13, II 14 and II 15) Visit Tracker Note: Children with Current Education Status = Kindergarten will be excluded from this report.
II 13	10	New Children: Children with Effective Start Date within the time period of 4/2/2024 - 4/1/2025 NOTE: Child's Effective Start Date is the latest of a) family enrollment, b) the child's date of birth, OR c) the child's "start date" (in cases of adoptio foster care). This "Effective Start Date" starts the 90-day timer for child screenings and health records. The date range displayed encompasses 90 before the end of the previous PY and 90 days before the end of the current PY. NOTE: Children who enrolled during this date range reached (or would have reached) 90 days of enrollment during this program year.
II 13a	1	Previous year: How many children who had at least one visit during the program year had an effective start date within the time period of 4/2/2024 6/30/2024?
II 13ai	0	Exit before 90 days: How many of these children exited after 7/1/2024 and prior to reaching 90 days enrollment?
II 13aii	1	Enrolled at least 90 days: Subtract {II.12.a.i} from {II.12.a}. The total is:{III.12.a.ii}. These children enrolled last program year but reached 90 days enrollment this program year. (This is the total who enrolled within the time period of 4/2/2024 - 6/30/2024 and remained enrolled for at least 90 da longer.) We will use this number for later equations.

14 When ready, click the transfer button "Submit APR"

Affiliate Performance Report 2024 - 2025

Program Code (s): 073-106 Date Range: 7/1/2024 - 6/30/2025 Consolidated: No PAT Affiliate ID: 313 Date Printed: 5/30/2025

The APR counts all families and children based on their latest home visiting enrollment in the reporting period.

Only home visitors indicated as "PAT Affiliate" on their Home Visitor Data page - and their assigned families - are included in the report. Only APR items that can be calculated in Visit Tracker are displayed on the Visit Tracker APR.

Ready to send to PATNC Key Survey

Submit APR

Download APR CSV

I. Organizational Design

C. Staffing

C1		<p>Staff at Beginning of PY: Please indicate the number of staff employed as parent educators at the beginning of the 2024-2025 program year (incl supervisors who carried a caseload in these counts):</p> <p>Visit Tracker Notes: Counts home visitors with at least 1 private contact - including deactivated - that do not have an End Date prior to the reportir period and have data entered for "Hours Per Week" and/or "FTE" on their data page. If entries for these 2 fields conflict containing both part time a time data, the home vistor will be counted as full time.</p>
C1a	0	<p>Full-Time PEs Start of PY: How many parent educators (including supervisors who carried a caseload) provided parent educator services full-time (greater than .5 FTE)1 at the beginning of the program year? Full-time is defined as more than 20 hours per week.</p>
C1b	1	<p>Part-Time PEs Start of PY: How many parent educators (including supervisors who carried a caseload) provided parent educator services part-tir FTE or less)1 at the beginning of the program year? Part-time is defined as 20 hours or less per week.</p>
C2		<p>Staff Changes: Please report on staffing changes that occurred during the 2024-2025 Program Year:</p>

15 You will receive a success message indicating the transfer is being processed.

Visit Tracker
TEST ENVIRONMENT

[Setup](#) [Admin](#) [Families](#) [Guardians](#) [Children](#) [Home Visitor](#) [Calendar](#) [Reports](#) [Support](#)

-
- Log Out
- Home Page
- APR
- Home Visitor Caseload

APR

Your APR submission has been queued for processing. You will be notified once it's complete. Please avoid re-submitting while it's in progress. ✕

PAT Affiliate ID 313

Pcode 073-106

Program Name PAT APR Integration Tutorial

APR Submission

Note: Once your APR begins the review process please click [here](#) to access your APR through the portal to ensure an accurate status is displayed in that system.

APR Submission Generator

Submissions			
Program Year	Date Submitted	Status	KeySurvey URL
2025		Pending	

If you need to make changes to your APR after submission, you can regenerate the updated numbers under **APR Submission Generator**. Then, visit your Key Survey link to **manually update** the data as needed.

16 The pending transfer is shown in the Submissions table.

Home Page

APR

Home Visitor Caseload

Your APR submission has been queued for processing. You will be notified once it's complete. Please avoid re-submitting while it's in progress.

PAT Affiliate ID 313

Pcode 073-106

Program Name PAT APR Integration Tutorial

APR Submission

Note: Once your APR begins the review process please click [here](#) to access your APR through the portal to ensure an accurate status is displayed in that system.

APR Submission Generator

Program Year	Date Submitted	Status	KeySurvey URL
2025		Pending	

If you need to make changes to your APR after submission, you can regenerate the updated numbers under **APR Submission Generator**. Then, visit your Key Survey link to **manually update** the data as needed.

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17 Once ready, the Key Survey URL will be posted. Click on that address to complete the remaining APR items.

Log Out

Home Page

APR

Home Visitor Caseload

PAT Affiliate ID 313

Pcode 073-106

Program Name PAT APR Integration Tutorial

APR Submission

Note: Once your APR begins the review process please click [here](#) to access your APR through the portal to ensure an accurate status is displayed in that system.

APR Submission Generator

Program Year	Date Submitted	Status	KeySurvey URL
2025	5/30/2025	Completed	https://app.keysurvey.com/f/41766439/5ee767cd866446e2?LQID=1&

If you need to make changes to your APR after submission, you can regenerate the updated numbers under **APR Submission Generator**. Then, visit your Key Survey link to **manually update** the data as needed.

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You can click back on the APR Submission and review your numbers or download the submission to a CSV file.

- Log Out
- Home Page
- APR
- Home Visitor Caseload

PAT Affiliate ID 313
Pcode 073-106
Program Name PAT APR Integration Tutorial

APR Submission

Note: Once your APR begins the review process please click [here](#) to access your APR through the portal to ensure an accurate status is displayed in that system.

APR Submission Generator

Submissions			
Program Year	Date Submitted	Status	KeySurvey URL
2025	5/30/2025	Completed	https://app.keysurvey.com/f/41766439/5ee767cd866446e2/?LQID=1&

If you need to make changes to your APR after submission, you can regenerate the updated numbers under **APR Submission Generator**. Then, visit your Key Survey link to **manually update** the data as needed.

Open Report

19 IMPORTANT

You can only transfer your APR numbers 1 time. Should you need to make changes to the numbers transferred, you can generate the report again. Click on the APR Submission Generator button.

APR

PAT Affiliate ID 313
Pcode 073-106
Program Name PAT APR Integration Tutorial

APR Submission

Note: Once your APR begins the review process please click [here](#) to access your APR through the portal to ensure an accurate status is displayed in that system.

[APR Submission Generator](#)

Program Year	Date Submitted	Status	KeySurvey URL
2025	5/30/2025	Completed	https://app.keysurvey.com/f/41766439/5ee767cd866446e2?LQID=1&

If you need to make changes to your APR after submission, you can regenerate the updated numbers under **APR Submission Generator**. Then, visit your Key Survey link to **manually update** the data as needed.

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20 Enter your report parameters again.

Only one report is submitted by PAT Affiliate ID.

Date Range: 05/16/2023 To 05/15/2024

Site/Fund Codes: All Site/Fund Codes

Email me when report finishes processing

[Get Report](#) [Cancel](#)

Pending reports
No pending reports.

[Refresh](#)

Reports ready to view [Delete Multiple Reports](#)

Show 10 entries Search:

Report	Requested date	Date Range	Programs	Options
APR Submission	5/30/2025 5:43 PM	7/1/2024 to 6/30/2025	073-106 PAT APR Integr	

21 Click "Get Report"

Only one report is submitted by PAT Affiliate ID.

Date Range 05/16/2023 To 05/15/2024

Site/Fund Codes All Site/Fund Codes

Email me when report finishes processing

Get Report **Cancel**

Pending reports
No pending reports.

Refresh

Reports ready to view

Delete Multiple Reports

Show 10 entries Search:

Report	Requested date	Date Range	Programs	Options	
APR Submission	5/30/2025 5:43 PM	7/1/2024 to 6/30/2025	073-106 PAT APR Integr		<input type="checkbox"/>

22 In the Reports Ready To View table, you'll see the "pinned" report which is the APR transferred to Key Survey.

Site/Fund Codes All Site/Fund Codes

Email me when report finishes processing

Get Report **Cancel**

Pending reports
No pending reports.

Refresh

Reports ready to view

Delete Multiple Reports

Show 10 entries Search:

Report	Requested date	Date Range	Programs	Options	
APR Submission	5/30/2025 5:43 PM	7/1/2024 to 6/30/2025	073-106 PAT APR Integr		<input type="checkbox"/>
APR Submission - Submitted Y2025	5/30/2025 12:16 PM	7/1/2024 to 6/30/2025	073-106 PAT APR Integr		<input type="checkbox"/>

Previous 1 Next

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Review the latest APR report generated and adjust your numbers in the Key Survey system.

Site/Fund Codes

Site/Fund Codes

Email me when report finishes processing

Pending reports
No pending reports.

Reports ready to view

Show entries

Report	Requested date	Date Range	Programs	Options	
APR Submission	5/30/2025 5:43 PM	7/1/2024 to 6/30/2025	073-106 PAT APR Integr	<input type="checkbox"/>	<input type="checkbox"/>
APR Submission - Submitted Y2025	5/30/2025 12:16 PM	7/1/2024 to 6/30/2025	073-106 PAT APR Integr	<input type="checkbox"/>	<input type="checkbox"/>

Previous Next