California Department of Public Health
Maternal, Child and Adolescent Health Division
Black Infant Health Program (BIH)

MCAH BIH MIS
User Manual

Version 1.0

Revised 4/16/2013

The MCAH BIH MIS was developed and is maintained by California Department of Public Health, Maternal, Child and Adolescent Health Division.

Training and technical support for the MIS is provided by Branagh Information Group with funding from California Department of Public Health, Maternal, Child and Adolescent Health Division.

MCAH BIH MIS Technical Support

Branagh Information Group

(707) 895-2510

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Introduction

The MCAH BIH MIS (or MIS) was developed to provide standardized data entry for local health jurisdictions (LHJs) that provide services to clients in the updated BIH program model. This standardized data collection and aggregation across BIH LHJ sites is important for evaluation of the updated BIH program. BIH staff contributes to the evaluation process in several ways; by following the standardized model or documenting any changes, ensuring data collection and data entry quality and providing facilitator feedback after each group session.

Since the MCAH BIH MIS is being developed in phases, this User Manual will be updated as new versions of the MIS become available. Later phases will include more reports and additional user functionality. The MIS is located on a secure state server and users access the MIS through an internet browser.

System requirements for the MCAH BIH MIS

- Microsoft.NET 4 extended (full) version (not the client version) and above
- High speed internet connection –Standard DSL or better
- 2GHz+ CPU, 2GB+ RAM, 1024 x 768 or better display
- Windows XP or higher
- Internet Explorer 7.0 or higher

All software requirements necessary for the MIS can be installed using the prerequisite installer found in the link below. The person running this installer will need administrative rights.

The first step to using the MCAH BIH MIS is to run the prerequisites on each of the users' computers.

Steps…

1. Login to your computer with an account that has admin rights. If you are uncertain whether you have admin rights, you can check with your local techs or call Branagh Group for help.
2. Start Internet Explorer
3. Navigate to https://mcahmis.cdph.ca.gov/prerequisites.htm
4. Add the site to the trusted sites in Internet Options
5. Click the Install Prerequisites button

Once the process is completed you will see a window with the text "Prerequisites installed".

You may now log into the application using the following link:
https://mcahmis.cdph.ca.gov/publish.htm

You may wish save this link to your Favorites Bar. If you need help with this call Branagh Group at 707-895-2510)

Branagh Information Group will provide tech support from 8am to 5pm Monday through Friday (excluding holidays).

(707) 895-2510 or

BIHHelpDesk@BIHLocalSupport.com

Registering as a user in the MIS

In order to gain access to the MIS first request access from your supervisor (BIH Coordinator) at your LHJ. Your BIH Coordinator will submit the following information to Amish Doshi at State MCAH: name, email address, phone number and role(s) in BIH. All LHJ staff members whose contact information has been sent to Amish Doshi at MCAH are then registered as Users. Branagh Information Group will handle the distribution of user names and passwords

Username/Password Administration

Branagh Information Group will provide each staff person with a personal username and password once you have installed all prerequisites on your computer and have been trained. Please call Branagh information Group at (707) 895-2510 individually for assistance. You can request **by phone** that Branagh Information Group change your password. Passwords cannot be sent via email.

NOTE: If you enter the wrong username or password five times the system will lock you out. System administrators cannot provide users with their existing password; passwords must be reset if they are forgotten or compromised. If you are locked out, have forgotten your password, or feel that it has been compromised, please call Branagh Information Group for assistance at the number above.

Logging in to the MIS

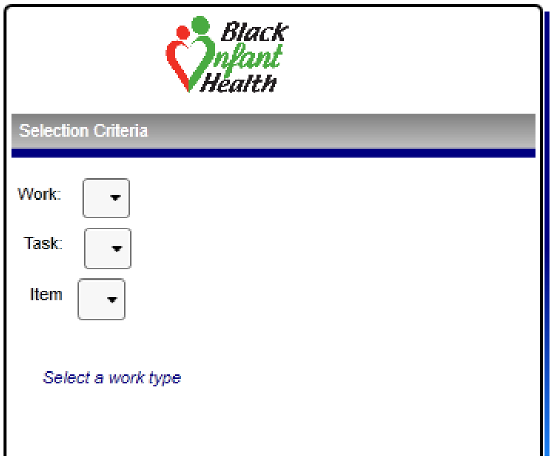
The MIS is accessible via the Internet Explorer browser from your local computer.

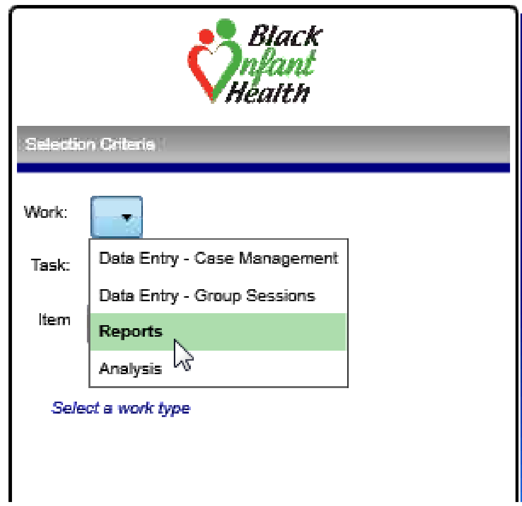
To work in the MIS enter the website URL into your Internet Explorer browser.
https://mcahmis.cdph.ca.gov/publish.htm

When you receive your personal user name and password, it will provide access to your specific LHJ data. For ease of entry you may want to create a button on the Favorites Bar at the top of your browser for the MIS. Branagh Information Group can help with that process. Below is the initial screen you will see, although the version number can change as it is updated.

Click **Run** to bring up the **BIH Login** screen.

Enter your username and password. The password window expands as you enter characters. The **Environment** should always show **Production**. Click **OK** and the **Selection Criteria** window will open on the left side of your screen for you to choose where you want to work in the MIS.





Three pull downs in the **Selection Criteria** window allow you to choose the type of **Work** you want to do in the MIS and, based on that, the **Task** you want to perform and then the specific **Item** you want to work with. The name **Item** may change for the third pull down depending on the **Task** you choose. You will be directed to each choice by a note under the three windows.

The main areas of **Work** or sections of the MIS are:

Data Entry – Case Management

Data Entry – Group Sessions

Reports

Analysis

Logging Out of the MIS

When you are ready to exit out of the MCAH BIH MIS, make sure your work is saved and close the browser. A Log Out button may be added in future updates to the system.

To Contact Tech Support

At the bottom of all screens in the MIS you will see the contact information for Branagh Information Group tech support. If you need to email us about a problem please include a screen shot of the window you are having problems with including the information on the right and/or the error message.

Conventions Used in this Manual

HEADINGS for **Work** sections of the MCAH BIH MIS in this manual are capitalized and in 14pt bold face type. ***<u>Headings</u>*** for main step sections of this manual and forms that are entered into the MIS are in 12pt italicized bold face underlined type. **Headings** for other portions of the MIS, for windows in this manual and items in those windows and for forms that must be done but which are not actually entered into the MIS (except initiation and completion dates entered In Forms Status) are 12pt bold. Other words and phrases may be **bolded** and/or <u>underlined</u> for emphasis.

Directions for Keyboard Entry in MCAH-BIH-MIS

*For users who **prefer to utilize the keyboard** rather than the mouse for data entry in the MIS, guidelines for the different functions and short-cuts are provided below.*

Navigating through Selection Criteria Menu

After initial log in to the system,

- Press the tab key twice to select the first drop down editor which is “Work”.
- Use the up and down arrows to select amongst the available options in the “Work” editor.
- After making your selection, press tab to navigate to the next editor box which is “Task”.
- Repeat the same process using the up and down arrows for this editor and then “Tab” to the next drop down editor which is “Item”.
- If at any time you would like to change your options in the previous editors, use the Shift+Tab function to navigate backwards through the editors.

Entering and Editing Information

Once you select amongst the drop down windows, (depending upon what editor you are using), your current selection will be on the navigation tree on the left side of the screen from there,

- You can use the up and down keys to scroll through the different forms.
- To begin editing a form, select one of the options and then click tab until you reach the field within the form that you would like to start adding/editing.

For the fields within the form, navigation works the same way as described above.

- To move across fields, press the tab key. This navigates the user between questions and individual selections within those questions **except** in the case of a drop down menu.
- Once a drop down menu is highlighted, use the up and down arrow keys to navigate through the options in the said field.

To navigate amongst tabs within the same form (for example from Page 1 of Client Recruitment Form to Page 2),

- Press the tab key (or shift+tab depending on your location) to navigate to the point where Page 1 is highlighted (indicated by broken lines surrounding the text “Page 1”. After you highlight the field with broken lines, you would use the left or right arrows to navigate amongst the tabbed pages.

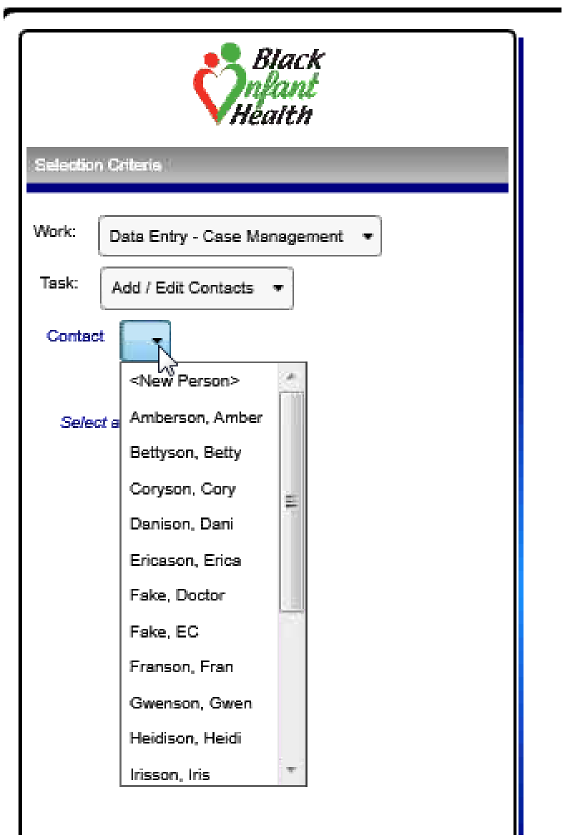
To know if a field is highlighted, indications include a combination of or either a bright green outline to that box or broken lines surrounding the space in the field.

The keyboard cannot be used for questions with “Check all that apply”

DATA ENTRY – CASE MANAGEMENT

In the **Data Entry – Case Management section of the MIS** you will be able to enter new and edit existing contacts (clients, prenatal care provider staff, emergency contacts), create a case or edit an existing case for a client, and enter forms from the BIH Data Book. This section of the MIS will guide you with the following steps.

1) ***<u>Finding a Person Already Entered in the MIS</u>***. The first step in working with any contact in the MIS is to ascertain whether that contact is new or has already been entered into the MIS. To find out if the contact is in the MIS:



1a) Use the **Work** pull down to choose **Data Entry – Case Management**.

1b) Use the **Task** pull down to choose **Add / Edit Contacts**.

1c) Use the third pull down (which changes to be called **Contact**) to see a list of contacts entered into the MIS sorted alphabetically by last name.

1d) Type the first three letters of the contact's last name to go directly to or near the contact, or use the **scroll bar** to scroll down through the names.

<u>If the person **is not** in the list</u> go to step ***<u>2) Entering a New Person and Making Corrections,</u>*** Page 12.

<u>If the contact **is** in the list, verify that it is the same person you are looking for using the birthdate or other contact information (see **2b** page 12 – 16). If so **do not add them again,**</u> but you can make changes or corrections in their **Contact Information** window.

If the contact you found in the list is a client, skip to step ***<u>3) Finding or Creating a Client's Case,</u>*** page 17 to find or create their case. Clients <u>must</u> be given a case record in order for you to be able to enter forms and register them for group sessions.

If the person is not a client they will be found in appropriate pull downs throughout the MIS (e.g. Emergency Contacts, Prenatal Care Providers).

To make changes to a person's contact information, refer to step **2) below** to find their **Contact Information** window and make the changes.

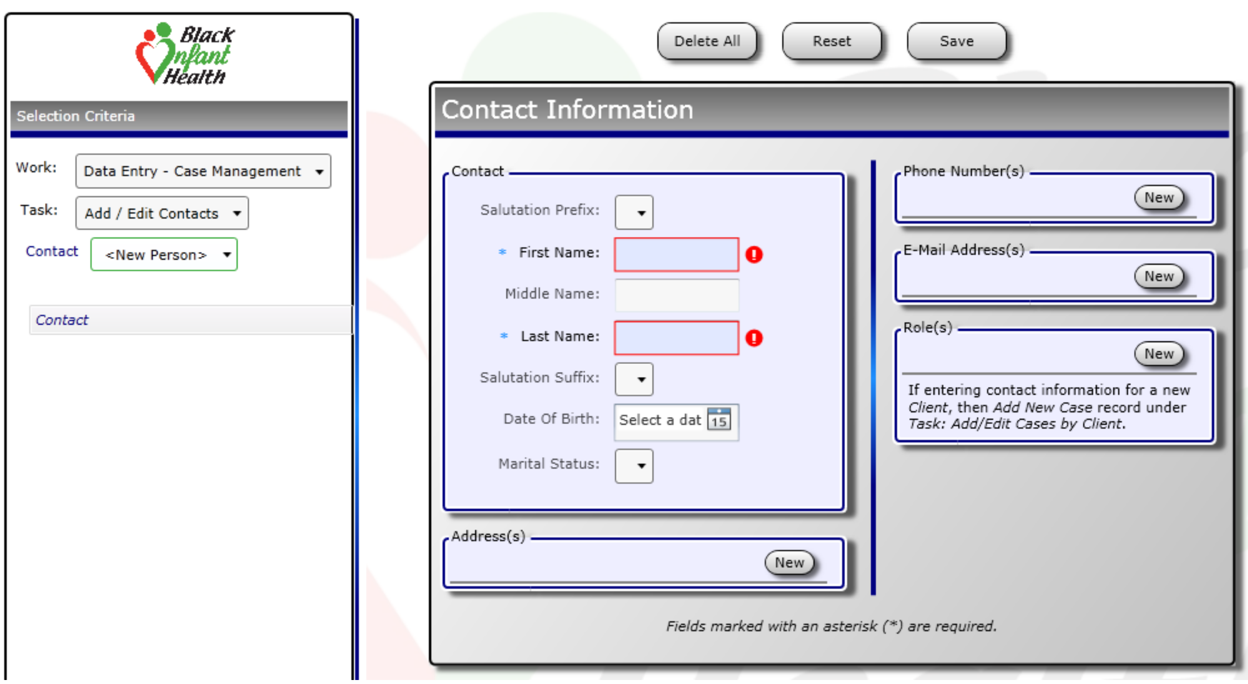
NOTE: If you cannot find a person in the MIS and you get a message that the person is already in the system when you try to enter her, contact Branagh Information Group 707-895-2510 for help finding the client.

2) Entering a New Person and Making Corrections.

2a) To enter a new person in the MIS,

i) Choose **Data Entry – Case Management** in the Selection Criteria window.
ii) Choose **Add/Edit Contacts**.
iii) Choose **<New Person>** at the top of the **Contacts** list as in the screenshot below.

The **Contact Information** window will appear on the right. Required fields are marked with an asterisk. Hover your cursor over the red circles and outlined boxes to see notes.

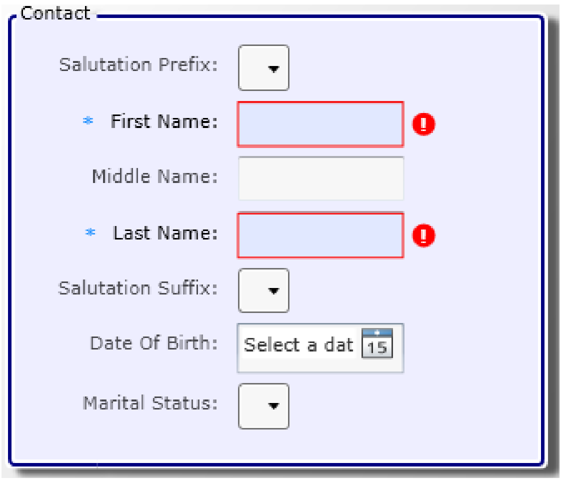


(<u>If you simply need to make corrections or changes</u> for a person's contact information use the **Contact** pull down to find the person's name and their **Contact Information** window will open on the right. Make the changes needed and click **Save**.)

2b) Contact Window

For clients, enter the First and Last Name, Date of Birth and Marital Status in the **Contact** section of the **Contact Information** window.

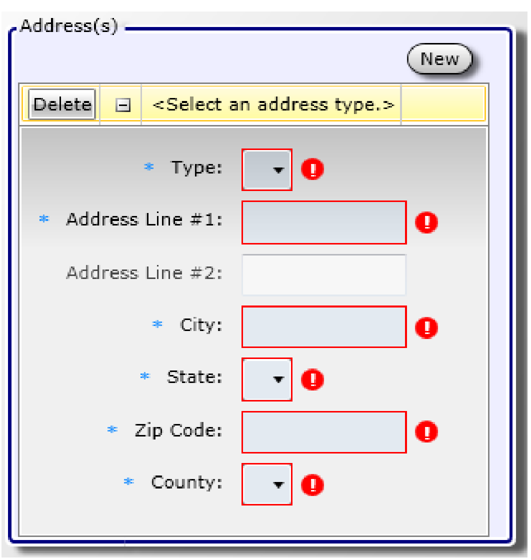
For non-client contacts (Prenatal Care Providers, Emergency Contacts, BIH Staff) you only need a first and last name in this **Contact** section.



The **Date of Birth** window uses the format of m/d/yy or mm/dd/yyyy in the field in front of the calendar page after clicking there once. You can also use the calendar function at the right end of the field.

2c) Addresses

To enter a new address click the **New** button in the **Addresses** window and click the **+** next to **<Select an address type.>** to see the fields. Use the scroll bar to see the whole window.



Use pull downs for **Type** of address, **State** and **County** and enter the rest of the address.

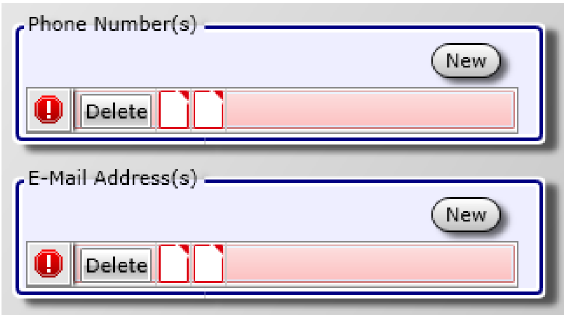
To close the window, click the **–** sign next to **<Select an address type.>**

To delete an old or erroneous address click the **Delete** button on the left of the address bar.

To enter another address, click **New,** then **+** and fill in the fields.

2d) Phone number(s) and E-mail address(es)

To enter a new phone number and email address, click the appropriate **New** buttons on the right side of the **Contact Information** window.



You will see two small white boxes outlined in red on the **Phone Numbers** and **E-Mail Addresses** bars.

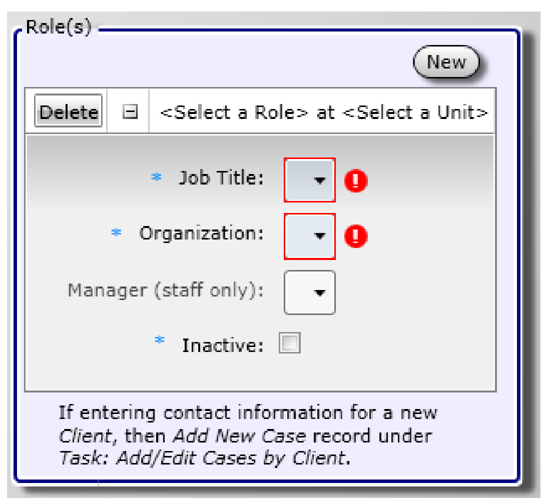
i) Double click on the white box on the **left** to see a square with a pull down arrow for you to choose the **Type** of phone number or email address.

ii) Click once on the white box on the **right** to enter the phone number or email address in the appropriate window.

iii) If you have more than one phone number or email address to enter, click the **New** button again as many times as needed and a new line will open for you each time to enter the next one.

If you need to delete an entry, each entry line has a **Delete** button.

2e) Role(s)



To enter the person's role:

i) Click the **New** button.

ii) Then click the **+** beside **<Select a Role>** in the **Role(s)** window.

iii) Use the **Job Title** pull down to choose the role of the person (client, FHA, emergency contact…).

iv) Choose your LHJ in the **Organization** pull down.

<u>**It is essential for each contact to have a Job Title and Organization.**</u>

<u>**Anyone recruited** as a client must have **Client** as their **Job Title** whether they enroll or not.</u>

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Additional Roles

Please note that LHJ staff may have more than one role. If so, click **New** again to enter each **Job Title** and your **LHJ**.

Correcting a Wrong Role Entry

If you enter the wrong **Job Title** for a contact, you cannot edit it. You must:

i) Click the **Delete** button on the incorrect line to remove it.
ii) Then click **New**,
iii) Click **+** between the **Delete** button and **<Select a Role>.**
iv) Then use the pull downs to choose the correct **Job Title** and **Organization**
v) Click **Save**
vi) Click the **–** next to **<Select a Role>**.to close the window.

Inactive Checkbox

The **Inactive** check box should only be used when a staff person is no longer with BIH and after any backlog data has been entered. When the **Inactive** box is selected it will remove staff from all appropriate pull downs. **Case** forms and **Group Sessions** involving any former staff **will remain as originally entered**.

When a staff member who leaves was a Case Manager for <u>currently Active</u> clients, you will need to change the **Case Manager** listed in the **Case** window for each of those Active clients.

Entering new LHJ Staff and Individual Prenatal Care Providers

Most LHJ staff have already been entered for each jurisdiction, but you will need to enter as contacts any new staff that are not on the list for your jurisdiction. You will also need to notify the State MCAH BIH Program staff of any personnel changes in your jurisdiction.

Many Prenatal Care Providers have already been entered. You will be responsible for entering as contacts any other individual personnel (doctors, nurses, etc.), who work for prenatal care organizations in your area. You do not enter the organizations. Organizational information is to be sent to Amish Doshi at MCAH BIH to be entered.

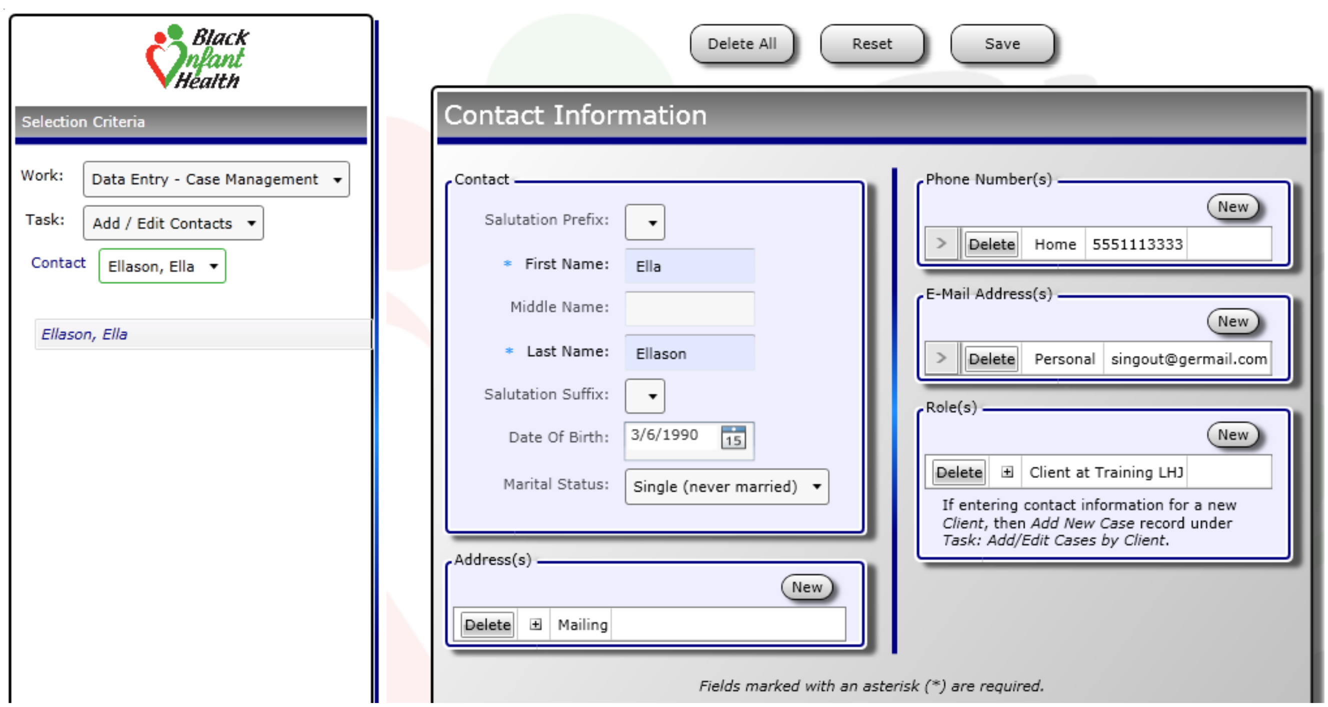
After entering a person, you will be able to find them in the **Contacts** pull-downs in the **Selection Criteria** window.

When you are finished with the **Contact Information** window, or if you need to quit before finishing, click the **Save** button to save your work**.**

To delete a portion of the **Contact Information** window use the **Delete** button on the line you want to delete.

To delete everything in the **Contact Information** window, click the **Delete All** button.

TIP: When you enter a new client, please enter all **new** contacts associated with this client (such as emergency contact and individual prenatal care provider) in their own **Contact Information** windows so these contacts will populate later in the **Case** window.



3) Finding or Creating a Client's Case Record

In order to enter forms or register for Group Sessions, the client must have a current open case record listed in the MIS. Per BIH policy, each pregnancy must have a separate case record.

3a) Finding a Client's Case Record

There are two ways to find an existing case.

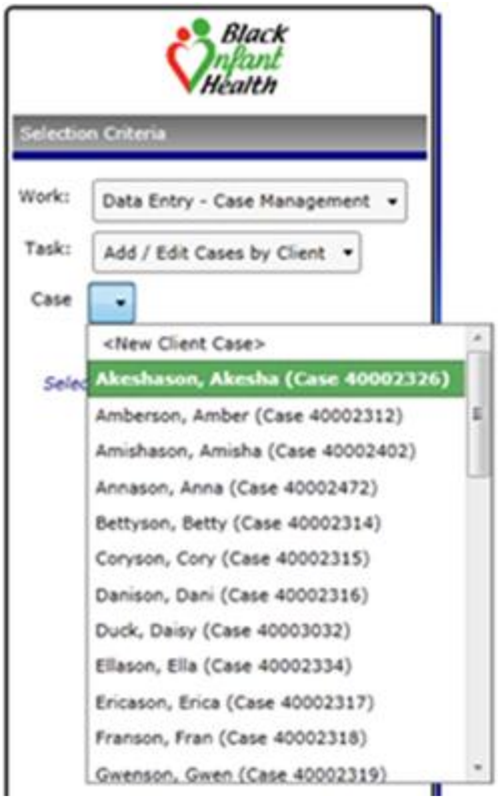
To locate the case with the **BIH Case Number**,

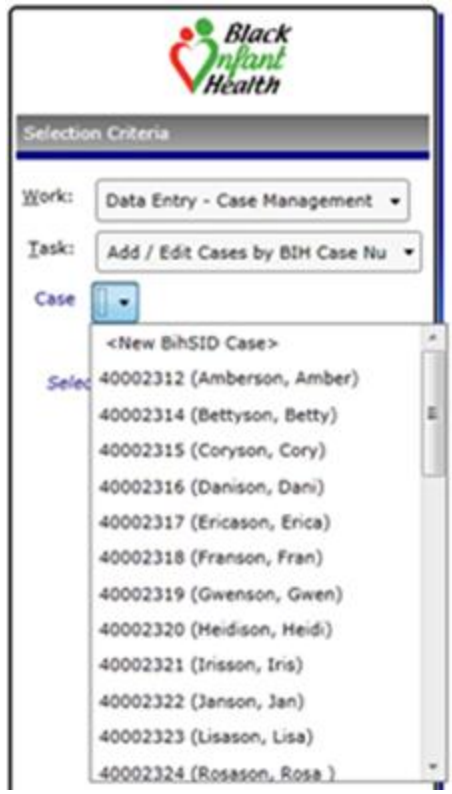
i) Choose **Data Entry - Case Management** in the **Work** pull down,
ii) Then use the **Task** pull down to choose **Add / Edit Cases by BIH Case Number**.
iii) Use the third pull down, which is now called **Case**, to find the **BIH Case Number** in the list.

To locate the case with the **Client's Name** (If you know she is in the MIS),

i) Choose **Data Entry - Case Management** in the **Work** pull down.
ii) Use the **Task** pull down to choose **Add / Edit Cases by Client,**
iii) Then use the third pull down to locate the person. The list is alphabetical by last name.
iv) Type up to three letters to quickly move closer to the name you want.

Clients will not be listed in the **Case list** in **Selection Criteria** until a **Case** record has been completed for them.





NOTE: If the person was a previous client of your LHJ and has been entered into the MIS previously, you must not create a new contact record, but rather **update** their existing contact information. You will need to create a new case record if the client has returned for a new pregnancy. (If the client was originally entered by MCAH staff from forms you sent in, you will need to complete entry of the rest of the forms for that case record.)

TIP: A unique person will have only one **Contact Information** window, but could have two or more **Cases** with different **Case** windows, different navigation trees in the **Selection Criteria** window and different BIH Case numbers. There is one case for each pregnancy. It is always important to make sure you have chosen the right case before entering data if there is more than one case listed per person.

If you don’t need to enter a new case for the person, refer to step **4a) Data Entry Overview,** Page 22, to refresh your memory about how forms are entered in the MIS, or **4b) Entering BIH DATA BOOK Forms,** page 26.

3b) Creating A Client's Case Record

The screen shot below shows the initial step to **create a new case**. For example the person below has already been entered into the MIS as a contact, but does not have a case record. A new client will not show up in the **Case** list until after you create a case for them.

To create the case:

i) Choose **Data Entry – Case Management**,

ii) Then choose **Add/Edit Cases by Client.**

iii) Choose **<New Client Case>** from the **Case** pull down**.**

iv) The **Case** window will open on the right.

v) Find the client in the **Client** pull down in that **Case** window as shown below.

vi) Use the **Emergency Contact** pull downs to choose either individual or organization or both.

vii) Use the **Prenatal Care Provider** pull downs to choose either individual or organization or both.

viii) The new **BIH ID number (aka BIH Case Number)** will auto populate after you save the case.

ix) If the client had a record in the previous BIH MIS system, please also enter their **Prior BIH MIS number**.

x) If your jurisdiction uses a **Local ID number,** please enter it in the Local field**.**

If the individual Emergency Contact or Prenatal Care Provider is not in the pull down:

If the client lists an individual for Emergency Contact or Prenatal Care Provider, and that individual is not listed in one of the pull downs, either the contact was not given the proper role or they have not been created as a contact. You will have to enter them in a **Contact Information** window Section 2A page # __ with the proper role before they will show up in the list.

If the organizational Emergency Contact or Prenatal Care Provider is not in the pull down:

If you need to enter an organization that does not show in the list, please send the name, address and phone number of the organization to Amish Doshi at MCAH BIH. Amish.Doshi@cdph.ca.gov He will enter the organization into the MIS and then you can select that organization as a prenatal care provider if an individual provider (e.g. Dr. John Smith) is not known.

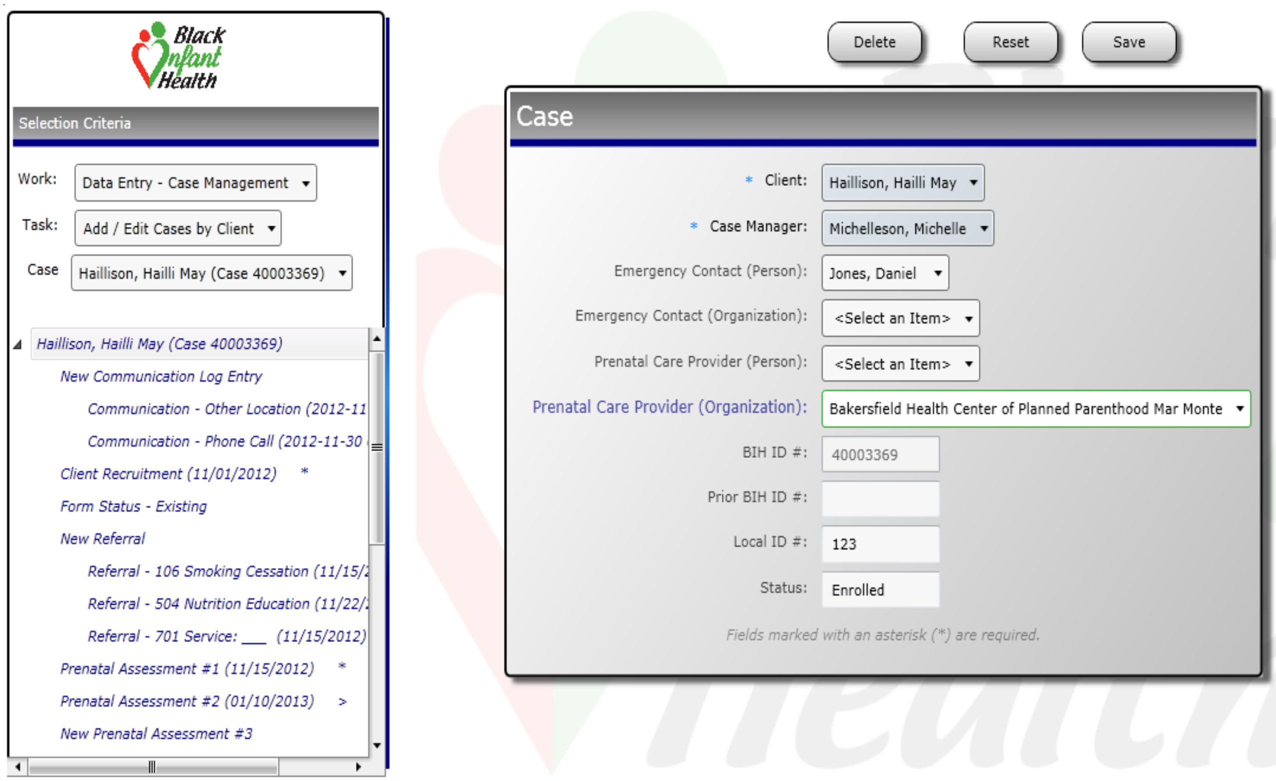
Status

Status will be a field that is automatically populated depending on forms that are filled out in the MIS for the client. It is under construction and not valid at this time – **please ignore this field.**

Click **Save** to save your work.

Client Case Navigation Tree

Once the case has been created, you will see in the **Selection Criteria** window a list of all forms which can be data entered for this client. This is known as the **Client Case Navigation Tree.**



NOTE: The **Selection Criteria** window can be expanded by pulling on the right border or you can use the **slider bar** at the bottom, as shown above, when written information is too wide for the space. If you don't have your MIS at full screen you may need to pull on the right border of your screen to make it wide enough to show everything.

4) BIH Data Book

4a) Data Entry Overview

Most of the forms in the BIH Data Book have similar methods of data entry, so they are explained here to avoid repetition.

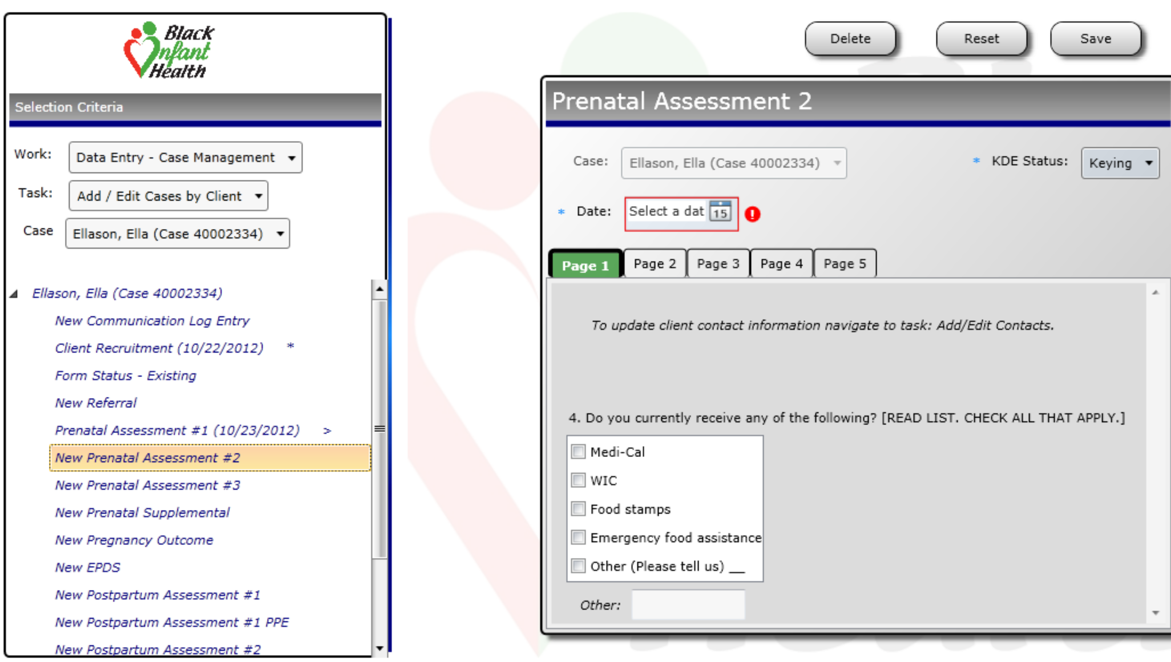
To enter forms from the BIH Data Book:

i) Choose **Data Entry – Case Management**.
ii) Then **Add/Edit Cases by Client.**
iii) Then choose the client's name from the **Case** list**.** Make sure you choose the current case if the client has more than one case. When the client has been chosen, the forms that can be entered are shown below the pull downs in the client case navigation tree.

As shown in the screen shot below, forms that have been at least partially entered will have **the date the FHA met with the client to complete the form** after the form name with the character **>** beside it.

Forms that have been completely entered will have that date with a ***** beside it.

Forms that have not been entered at all will have the word **New** in front of the form name.



Choose each form that is to be entered in the MIS from the **Client Case Navigation Tree**. If the form has more than one page, **each page within that form has a tab** which brings up a window with the questions found on that page.

Most windows of the Case Management section of the MIS are designed to follow a page in the Data Book. The full text of each question is shown on that page's window. A scroll bar or slider bar will help you to see the whole page or list in the MIS windows if the page or list is too big to be viewed otherwise.

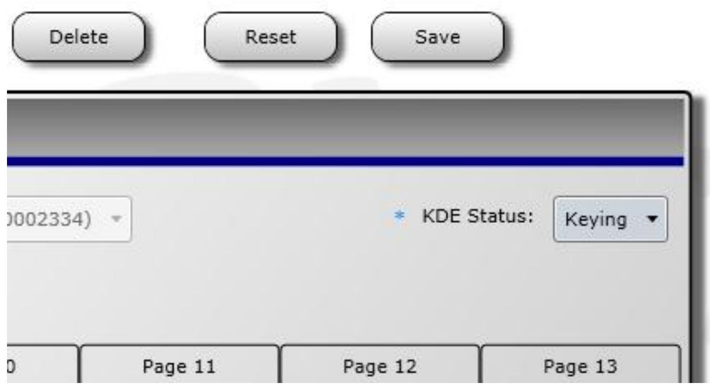
Delete, Reset and Save Buttons

There are three buttons above the open form that say **Delete**, **Reset** and **Save**.

You can click **Save** to save your work at any point while entering the data.

Clicking **Delete** will delete ALL information entered in the form window. If you need to delete one piece of information that you entered incorrectly, there are **Delete** buttons in appropriate places within the windows**.**

Clicking the **Reset** button will re-set the form back to the last information you **Saved**.



KDE Status

KDE Status refers to the current progress on a particular form filled out in their **Case Record.**

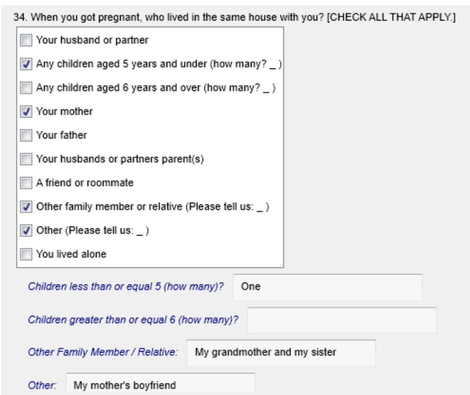
In the upper right hand corner of each form window you will see the words **KDE Status:** with a small window and pull down. This will show whether you are keying in data, or done with that form.

When you open the form to do data entry, the KDE Status should automatically be set to **Keying** which means the form is in progress. If you must leave the database but are not finished with the form, the word **Keying** should still show. You can click **Save** to save each page as you complete it or if you are called away at any point.

When you have completed ALL data entry for the form, change the KDE Status to **Done** and click **Save**. Please do not choose **Done** until all information has been entered into the form and you are sure it is all correct. This is very important because users and State MCAH will only be using data from the forms marked **Done** for analysis and reports. Failure to choose **Done** will exclude that client's data from being included in reports and analysis by either your LHJ or State MCAH.

Data Entry Styles in the Forms.

The forms have four main styles of data entry: "choose all that apply", enter a date, "choose one answer", or write in your answer.



Questions which have **more than one possible answer** will allow you to check several choices.

If a choice needs to have more information, there will be a window below the list for you to write in the information.

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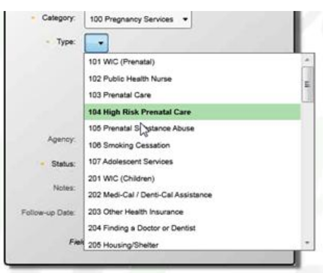
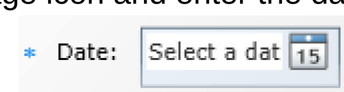


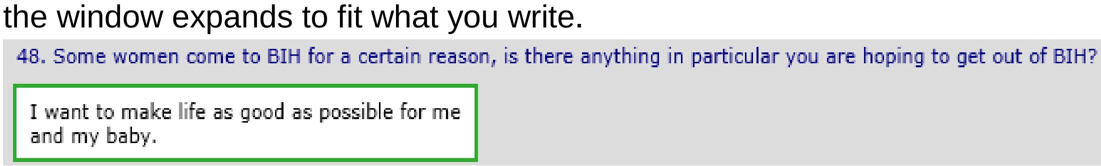
The questions that ask for **only one answer** will have a pull down so you can choose the one correct answer.

To **enter a date,** click in the space in front of the calendar page icon and enter the date in MM/DD/YYYY format.

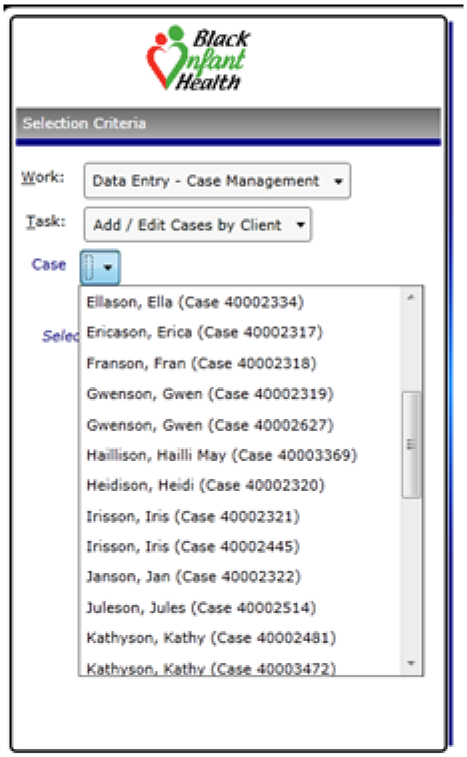


To use the calendar icon, click on it and highlight a date in the current month or use the arrows to move forward or back in time.

When the answer to a question calls for you to write something, you will be given space to type in that answer. This is shown in screen shots below. As you enter the data, the window expands to fit what you write.



Before You Can Enter a Form



As explained above, to enter a form for a client you must first either**:**

Enter the client's **Contact** record into the MIS (see Section 2, page 12),

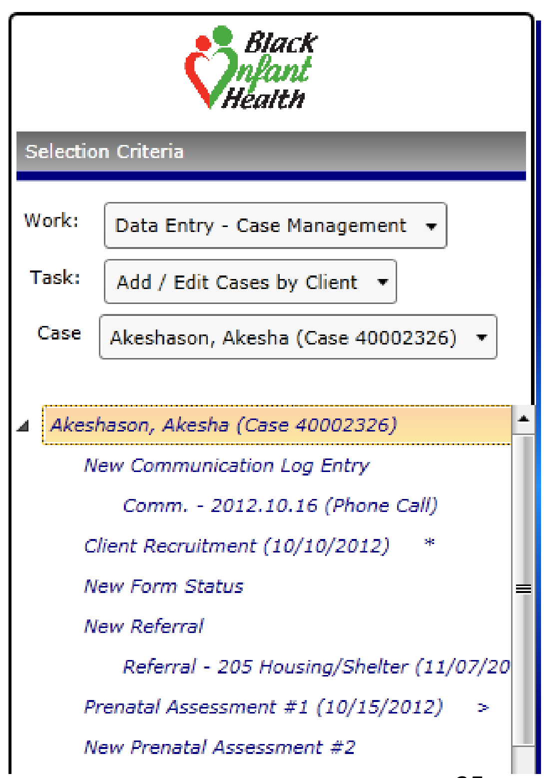
AND have created their current **Case** (see Section 3b, page 19),

OR

Find the client's existing **Case** record in the **Case** list (see Section 3a, page 17) in the **Selection Criteria** window.

If the client has been in the BIH program before, make sure you choose the correct BIH Case number for the current pregnancy.

Client Case Navigation Tree



When you choose the client's name from the **Case** list, the client case navigation tree containing a list of all appropriate forms will appear in the **Selection Criteria** window. **Click once on the desired form to open it for data entry.**

Forms that have not been previously entered will have the word **New** in front of their name in the tree.

Forms that have been partially filled out will have a date and the character **>**.

Forms that are complete will have a date and the character ***.**

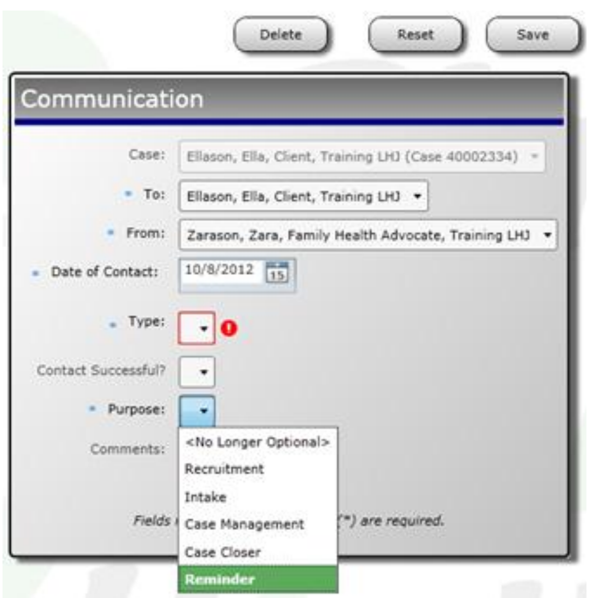
.*4b) Entering BIH DATA BOOK Forms*

Forms that will be data entered into the MIS are listed in the **Client Case Navigation Tree** on the **Selection Criteria** window. Asterisks in the open forms indicate required fields.

Always **make sure you have chosen the correct client's case, and the current case if the client has more than one pregnancy,** before choosing a form to enter. The client's name will show at the top of the form. If you accidentally choose the wrong person and begin to enter data before noticing, you can click the **Delete** button at the top to delete everything on that form. The form will regain its **New** status after the deletion.

Forms in the BIH Data Book which are not entered in the MIS (such as the ICP and Birth Plan) should have the dates they were initiated, worked on, and/or completed entered into the MIS in the **Forms Status** form. (See page 30)

Communication Log



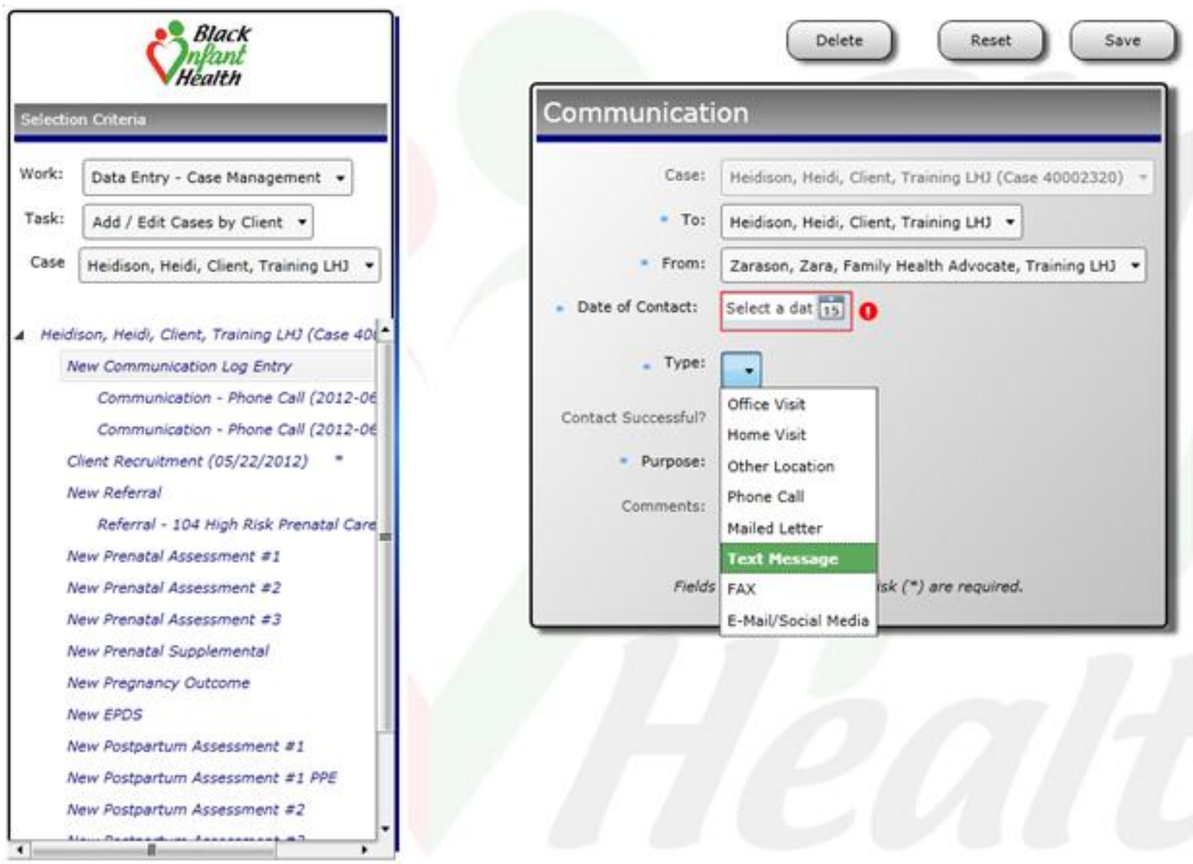
Click on **New Communication Log Entry** from the client's **case navigation tree** every time you have a communication record to enter.

Since the majority of the communications in the BIH program occur between the FHA and the client, the **From:** and **To:** fields will default to the client's FHA and the client respectively. Additionally, the pull downs on **From:** and **To:** allow you to choose from all BIH staff at your LHJ and every organization that has been sent in by any of the LHJs.

i) Enter the **Date** the communication occurred.
ii) Use the **Type:** pull down to enter information on where or how you communicated**.**
iii) Indicate whether the contact was **Successful**.

iv) **Purpose** is now a pull down for a limited number of choices and is required. Previous freeform entries will show as <No Longer Optional>.

v) Write in any **Comments** that you have about the communication. The space expands as you write.



Record all communications in regard to the client (from outreach to closure) whether done directly or on behalf of the client**.**

The **To** and **From** lists in the Communication window include all BIH staff at your site, referable agencies, hospitals, clinics, prenatal care providers, and emergency contacts.

After you click **Save,** your log entry will show up in chronological order indented under the **New Communication Log Entry** in the client case navigation tree.

Data entry for outreach-only clients

For women who are recruited but do not enroll you must:

i) Enter her in the MIS on the **Contact Information** window with a role of **Client.**

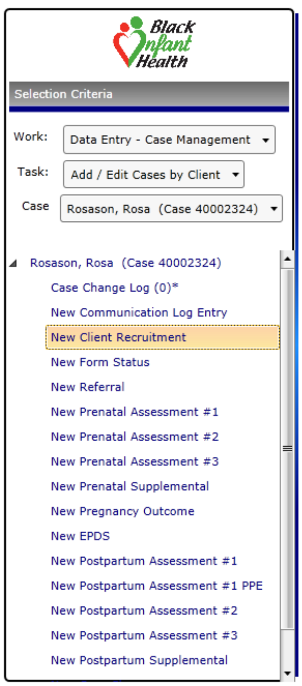
ii) Create a **Case record**.

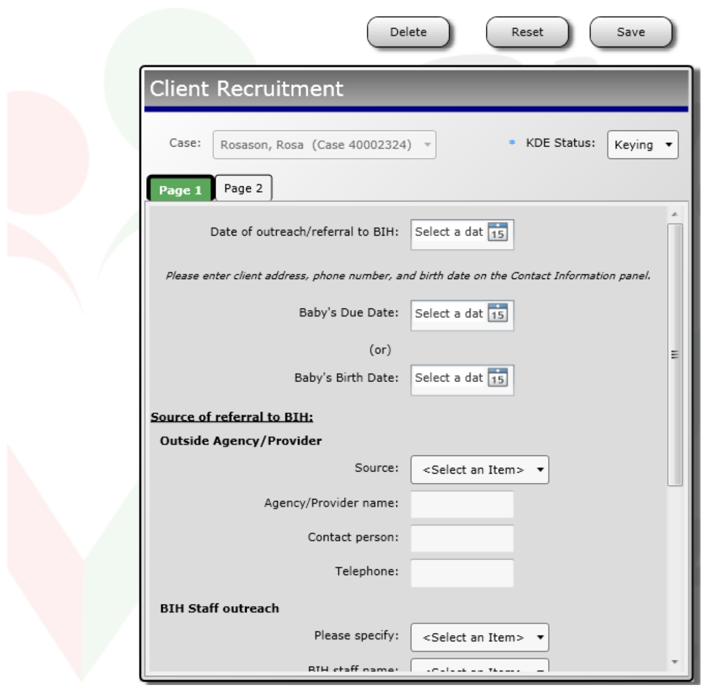
iii) Record each contact with or on behalf of her in the **Communication Log.**

iv) Fill out the **Recruitment form** and choose the appropriate not enrolled reason.

Important: If a woman who originally said she will not enroll returns and decides to enroll, with the same pregnancy, use the original **Case record**, edit the original **Client Recruitment Form** to show that she will enroll, and enter other appropriate forms.

Client Recruitment Form





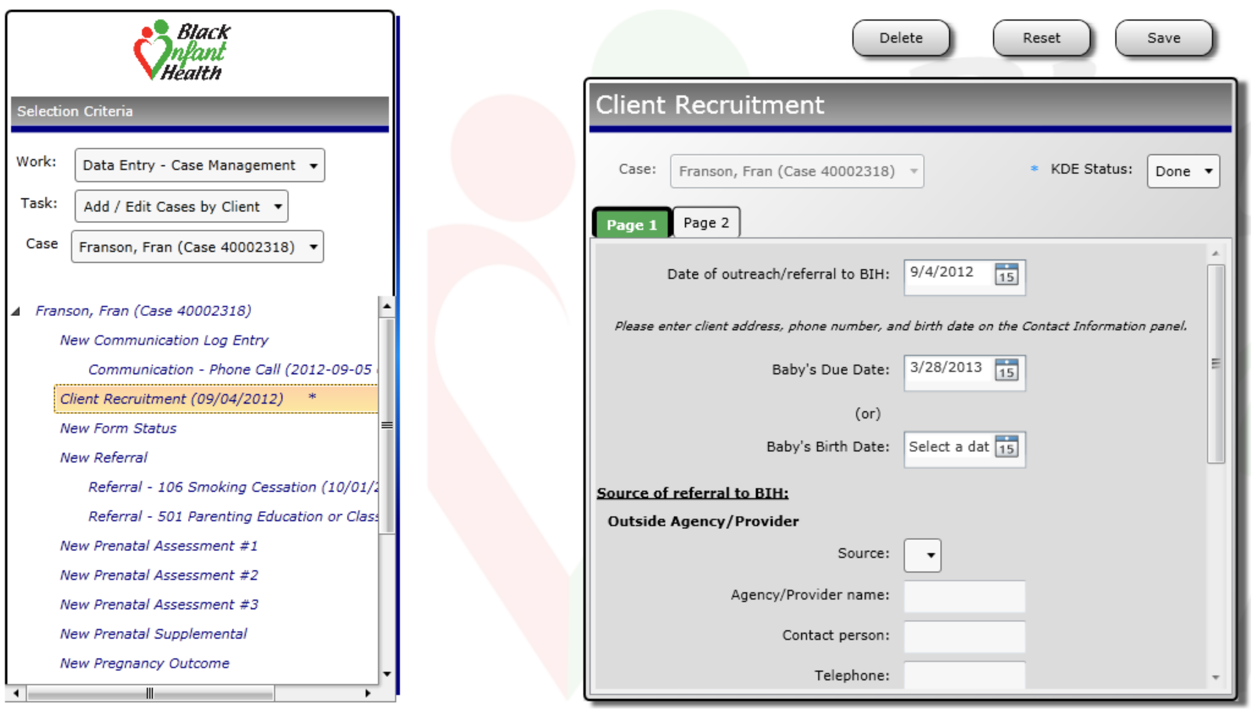
IMPORTANT: Please note that some of the information on the paper Client Recruitment form will be entered in two different areas of the MIS

1) The **Contact Information** window (Name, Address, Phone, Email, DOB)
2) All outreach communications from the paper form will be entered in the **Communication Log** in addition to the communications if and when the client enrolls is BIH.

The rest of the information from the paper form is entered on the two tabs of the **Client Recruitment** window.

i) Click **New Client Recruitment** in the **client case navigation tree** on the **Selection Criteria** window.
ii) The **Client Recruitment** window will open on the right.
iii) Use the **calendar page icons** to enter the requested dates.
iv) Use the **scroll bar** to see the lower portion of the page.
v) There should be <u>only one</u> source of referral to BIH listed on the form.

When you have completed data entry for both tabs, change the **KDE Status** to **Done** and click the **Save** button. Recruitment now shows in the client case navigation tree on the left with a date and with an * to show that it is complete.



Forms Filled Out at Intake

The **Intake Meeting** is to be scheduled within 30 days of successful contact for an eligible and interested client.

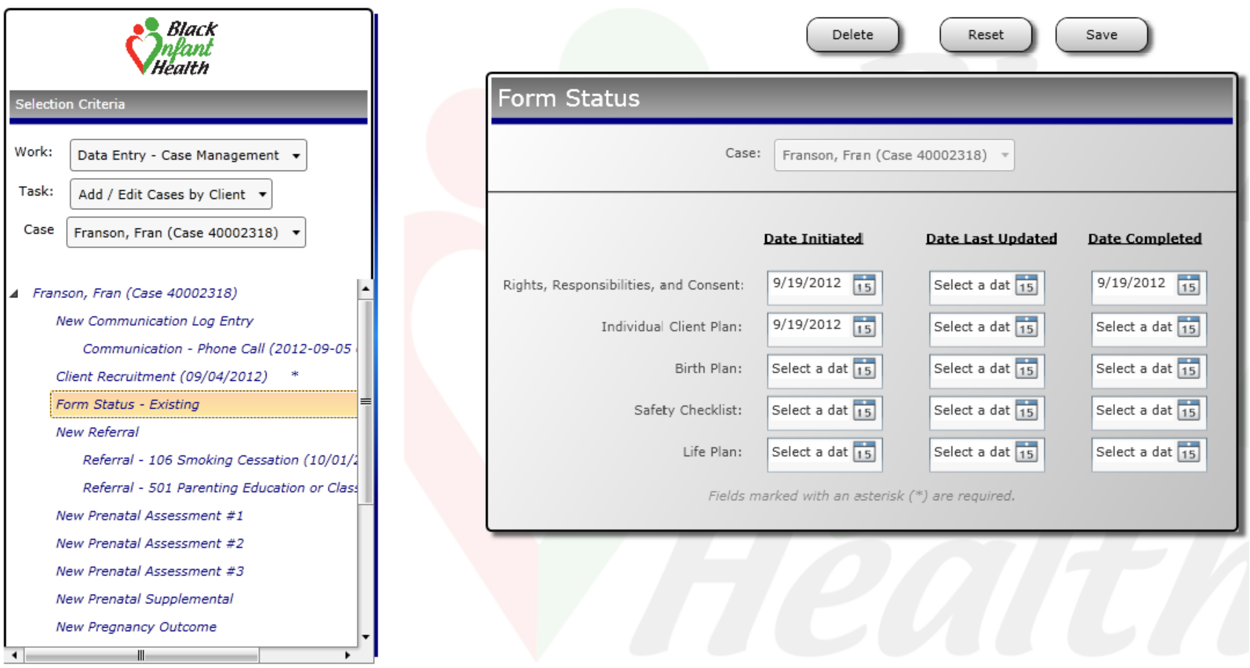
Client Forms Checklist (or PP Checklist for clients entering postpartum)

This checklist is in the Analyze section of the MIS and will automatically be populated when a form is data entered into the MIS. This also provides a handy way to make sure you have completed all necessary forms for your clients.

However there are several forms in the Data Book, such as the ICP, which will not be entered into the MIS and will be kept in the client's file instead. The dates initiated, updated and /or completed will initially be written on the paper check list. <u>With the new **Forms Status** window you are now able to enter the requested information on dates initiated, updated and completed for each of the forms or plans that are not actually entered in the MIS.</u> Those dates may be considered for inclusion in the **Client Forms Checklist** analyzer in the future.

<u>Form Status</u>

Form Status is a section in the MIS that you will use to track the status of five forms that are not entered into the MIS. You will enter dates for when the form was initiated, last updated and completed. You can access the **Form Status** by choosing **New Form Status** in the client case navigation tree. After you save your initial entries, the word **Existing** will show next to **Form Status**.



Each time BIH staff work with the client on a form that needs ongoing work, such as ICP or Life Plan, enter a new **Date Last Updated**. All dates entered will be held in the form's history.

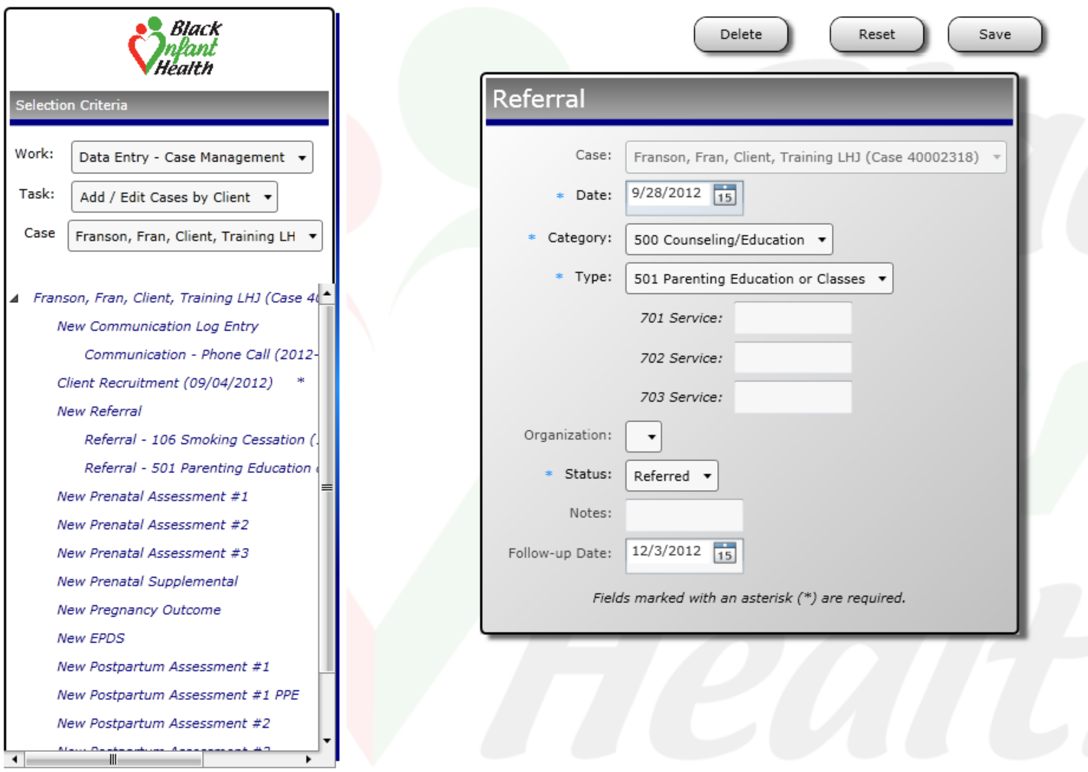
Rights, Responsibilities and Consent

This is one of the forms that are kept in the client's file and not data entered into the MIS. You only need to enter **the date the form was <u>completed</u>**.

Individual Client Plan

This is another form which will be kept in the client's file and not data entered into the MIS. Since the ICP is initiated during the Intake Meeting, that date should be entered in **Forms Status** for **Date Initiated**. Each time you work on the plan, enter the **Date Last Updated** into that window. When it is completed at the end of the program, enter the **Date Completed** in the **Form Status** window.

Referrals



i) Choose **New Referral** from the tree on the **Selection Criteria** window. The information follows the information in the paper form but in a different format.

ii) Use the pull downs to choose the **Category**, **Type** and **Organization.**

iii) Make sure the **Type matches that of the Category.** (For example a Category 100 referral – Pregnancy Services, should only have a **Type** that is in the 100s such as 101 WIC-Prenatal.)

iv) If the organization does not appear in the pull down, email the organization name, address, phone number and a contact person to Amish Doshi at MCAH State – Amish.Doshi@cdph.ca.gov .

v) Enter a date or choose a date from the calendar page icon for the date of the referral and also for the follow-up date.

When you click **Save** the **Referral** will show up in the navigation tree in the **Selection Criteria** window with the type and date as shown below.

New Referral

Referral - 104 High Risk Prenatal Care (05/24/2012)

To update the information for an existing referral, click on the original entry itself and fill in the **Referral** window with the updated information. Once you save your changes, the referral will show a new date and the MIS will keep the previous information in the Referrals History Analyzer that will be released later.

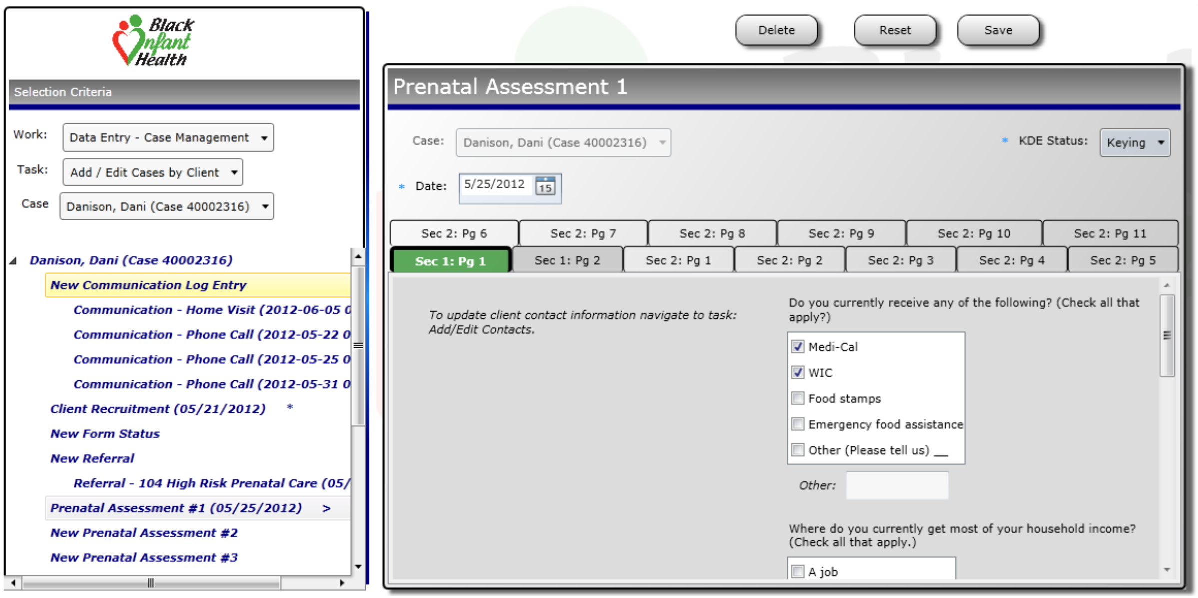
For each separate referral that is a different type please click **New Referral**.

Case Conferencing

Case Conferencing notes will be kept in the client's file and will not be entered into the MIS. The initial **Case Conference** is to be held within a month of a client's Intake Meeting with the FHA. Initially the dates are to be written on the paper Client Forms Checklist. Case Conferencing is not currently included in the **Form Status.** Dates that the Case Conferences are held will be under consideration for addition to the Form Status for the next release of a major version of the MIS

Prenatal Assessment 1 (PNA1)

IMPORTANT! For clients ENTERING the program POSTPARTUM: Choose Postpartum Assessment #1 PPE from the client's case navigation tree **instead of Prenatal Assessment #1** and continue with the other Postpartum Assessments**.**

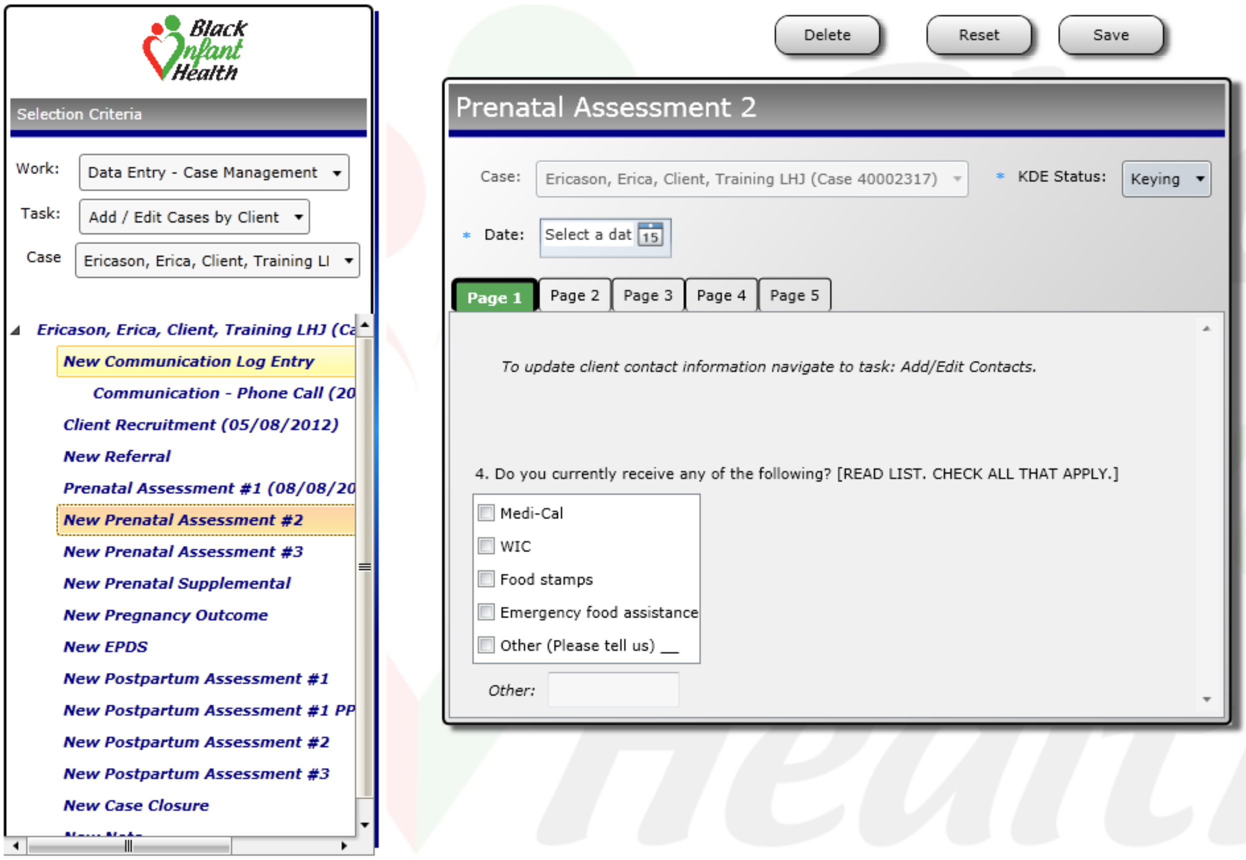


This form should **ALWAYS** be completed at the intake meeting if the client enrolls during any point in her pregnancy (before she has the baby).

i) Make sure you have chosen the correct case if the client has more than one case.
ii) Click once on **New Prenatal Assessment #1** from the client case navigation tree in the **Selection Criteria** window to open it.
iii) Enter the date that the assessment was completed with the client.
iv) Enter all information into the first page
v) When you finish with page one, click the next tab and so on until the whole form is completed. Each tab will show the questions from the same numbered page of the BIH Data Book.
vi) Use the scroll bar as needed to see the whole page.
vii) Click **Save** at any time
viii) Make sure the form has been completely and correctly filled in before you change the **KDE Status** to **Done** and do a final **Save**.

Prenatal Assessment 2 (PNA2)

i) Choose **New Prenatal Assessment #2** from the case navigation tree.
ii) Enter the date that the assessment was completed with the client.
iii) Continue as for PNA1 above.

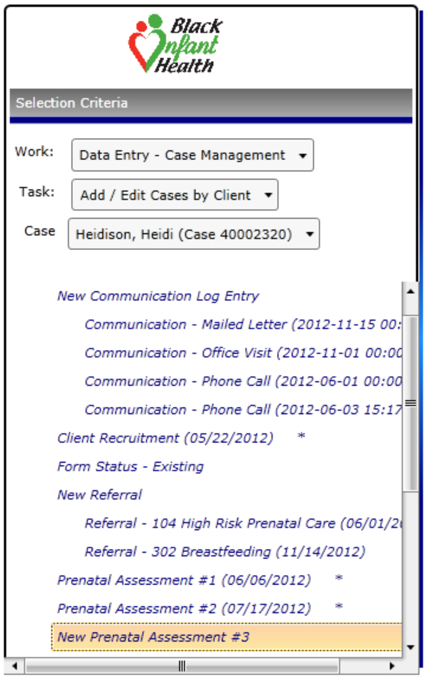


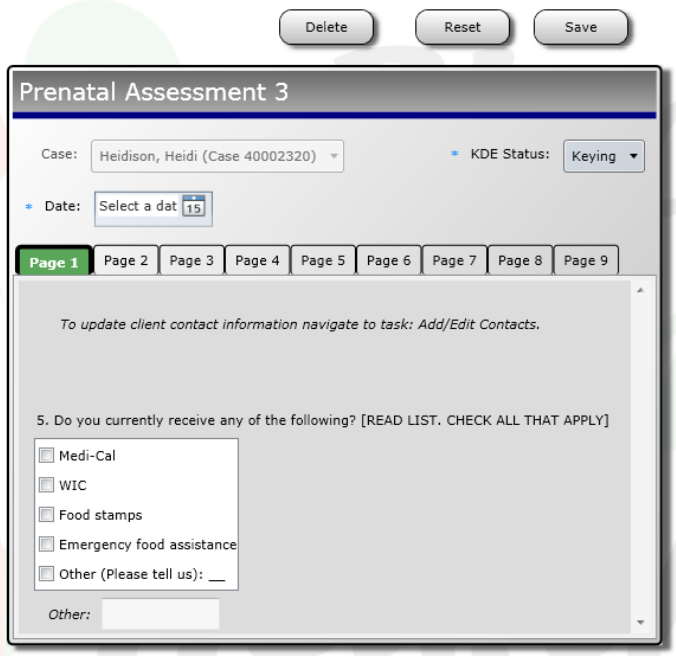
Birth Plan

The **Birth Plan** is not data entered into the MIS. Using the **Form Status** (page 30), please enter the **Date Initiated** in the appropriate row, and each time you work on the plan enter the **Date Last Updated** into the window. When it is completed, enter the **Date Completed**.

Prenatal Assessment 3 (PNA3)

Choose **New Prenatal Assessment #3** from the client's case navigation tree and fill out this form similarly to PNA.1 Enter the date that the assessment was completed with the client.





Prenatal Client Satisfaction

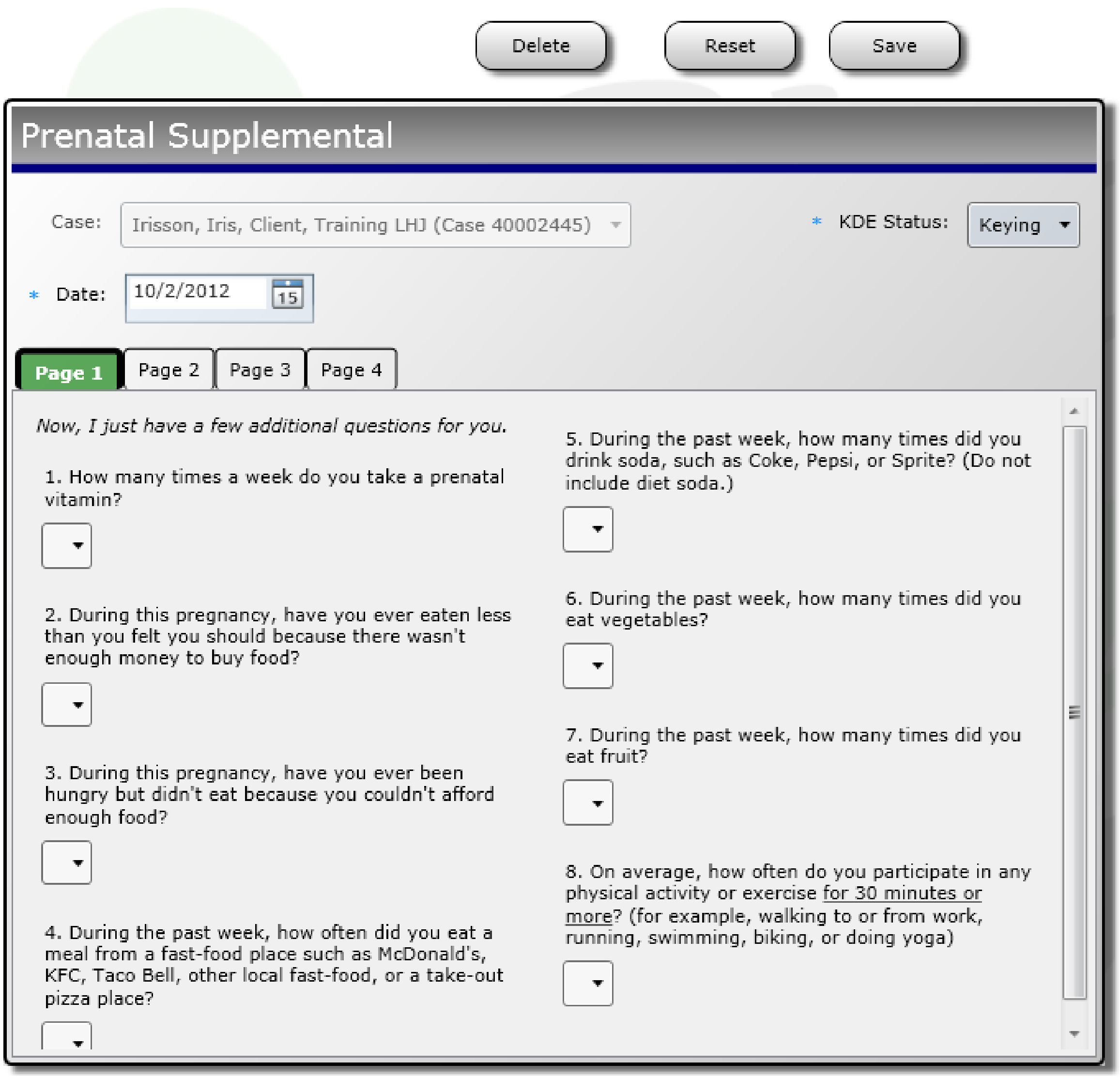
In order to allow a client's answers to be gathered anonymously, the **Prenatal and Postpartum Client Satisfaction forms** have been **moved into** the reporting section for the **Group Sessions** and are on the **Group information** window listed as **Evaluations** (Page.

Safety Checklist

The Safety Checklist is not data entered into the MIS. Now that the **Form Status** window is available in the MIS, please enter the **Date Initiated**, and each time you work on the checklist enter the **Date Last Updated** into the window. When it is completed enter the **Date Completed** in the **Form Status** window.

<u>Prenatal Supplemental</u>

- **i)** Make sure the client has been entered into the MIS on the **Contact Information** window and has a case created so a MCAH BIH MIS case number is assigned. Their BIH MIS number at your LHJ will be their prior BIH ID number.
- **ii)** Choose **Prenatal Supplemental** from their **Client Case Navigation Tree**.
- **iii)** Enter the date that the assessment was completed with the client.
- **iv)** Complete data entry for each tab in the form.
- **v)** When all is complete and correct change the **KDE status** to **Done** and **Save**.



Pregnancy Outcome

Choose **New Pregnancy Outcome** from the client's case tree on the left. Enter as much known information as possible for this form as data will be used to help track birth outcomes for BIH clients in future evaluations of BIH.

Use the pull downs to choose **Fetus Number**, the **Delivery Hospital Name**, **Infant Gender**, **Pregnancy Outcome**, **Gestation Weeks** and **Delivery Type**.

Use the scroll bar to see all of the questions.

To document twins or triplets choose **Fetus Number** 1 for the first baby, fill in all information and **Save**. Then choose **New Pregnancy Outcome** and choose **Fetus Number** 2 for the second baby and fill in the information for that baby, and so on.

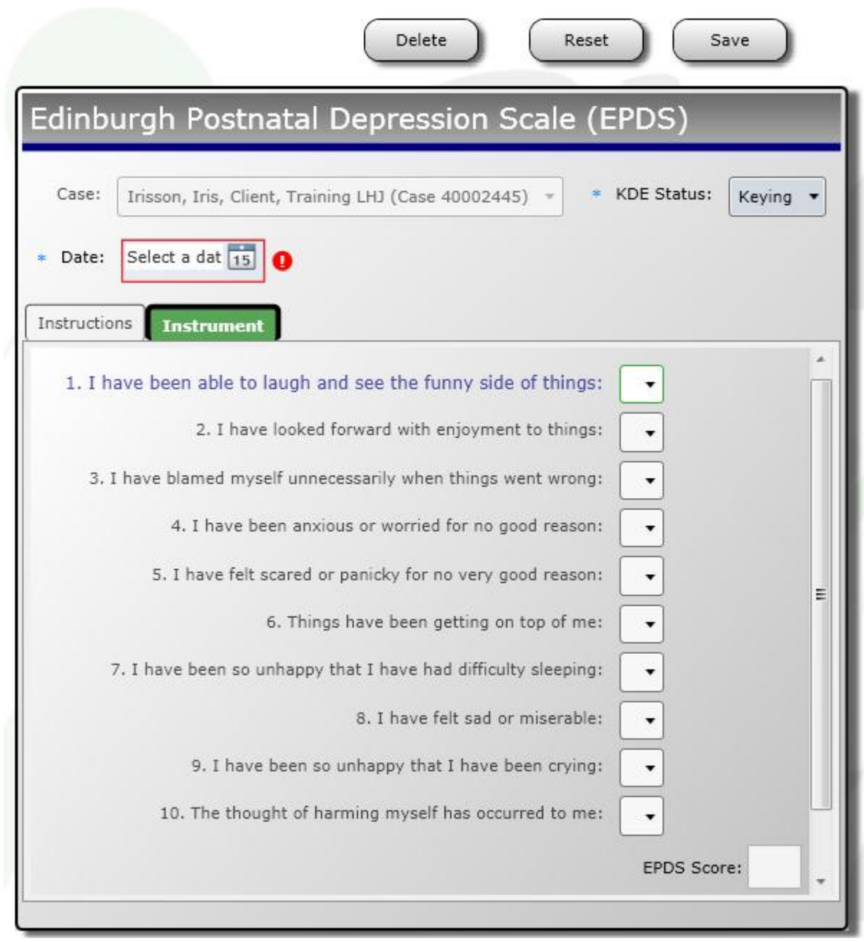
Pregnancy End Date refers to a fetal loss before birth. **Birth Date** is for the actual birth.

Enter the baby's names, weight and the birth date.

If the baby dies before or after birth and you know the reason, please enter it.

Edinburgh Postpartum Depression Scale

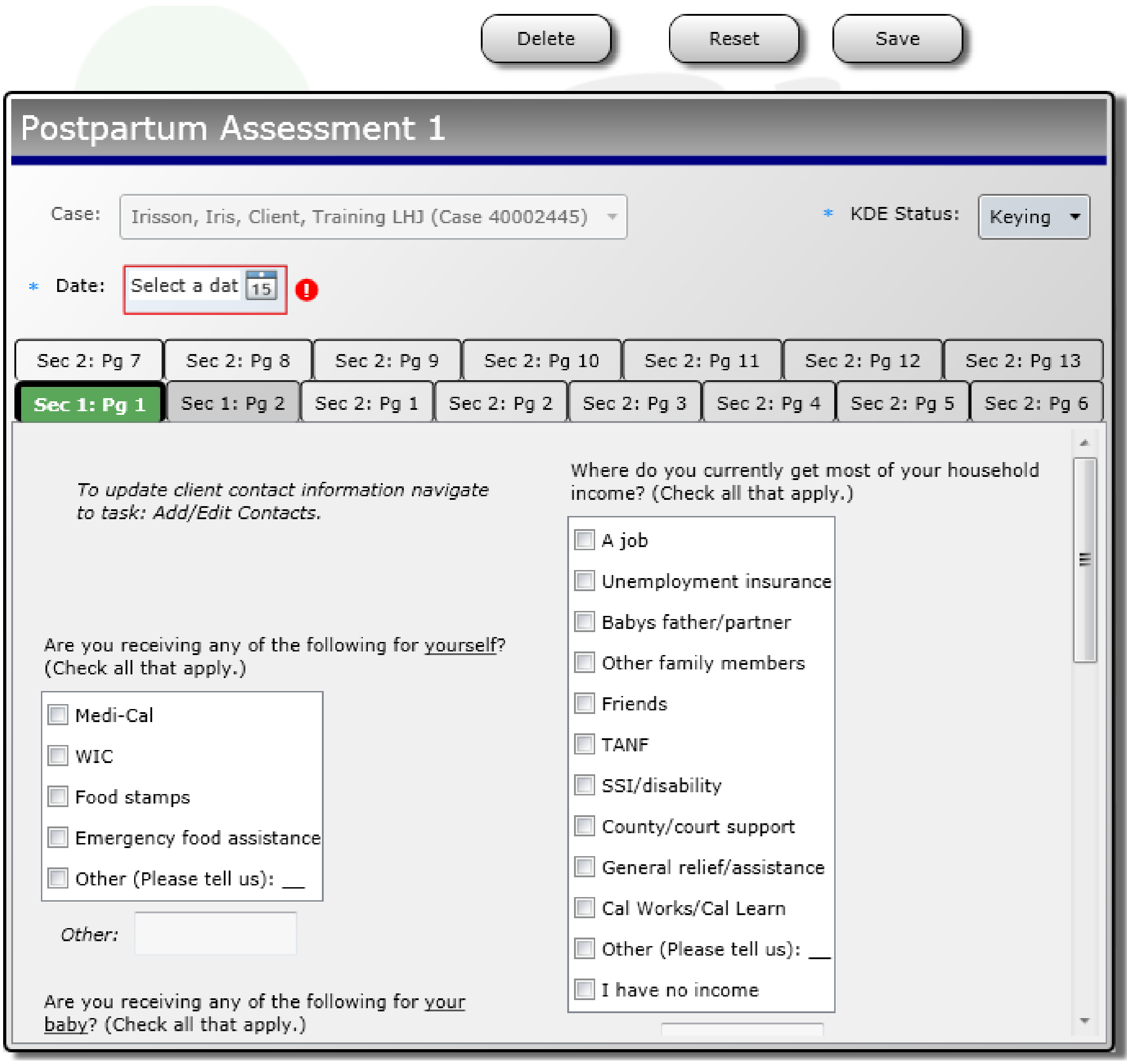
Choose **New EPDS** from the client's case navigation tree and fill in the date the FHA met with the client to complete this form. The score will calculate automatically when you finish marking all of the choices. When completely finished, change the **KDE Status** to **Done** and click **Save**.



<u>IMPORTANT! For clients ENTERING the program POSTPARTUM: Choose Postpartum Assessment #1 PPE</u> <u>from the client's case navigation tree</u> **<u>instead of Prenatal Assessment #1</u>** <u>and continue with other Postpartum Assessments.</u>

<u>Postpartum Assessment 1</u>

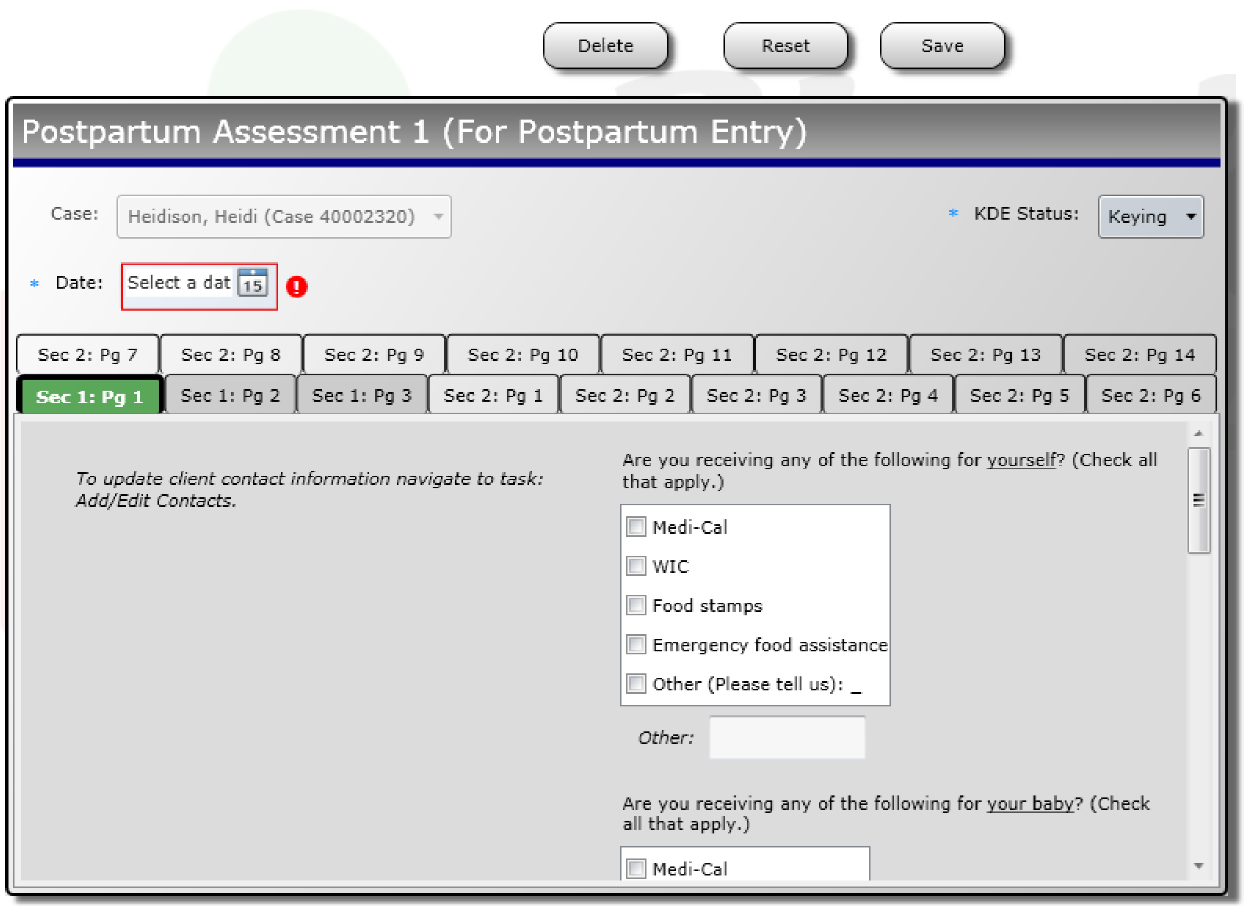
Choose **Postpartum Assessment #1** from the client's case navigation tree. Enter the date that the assessment was completed. When answers to all questions have been entered correctly change the **KDS Status** to **Done** and **Save**.



Postpartum Assessment 1 PPE (For Postpartum Entry) ONLY

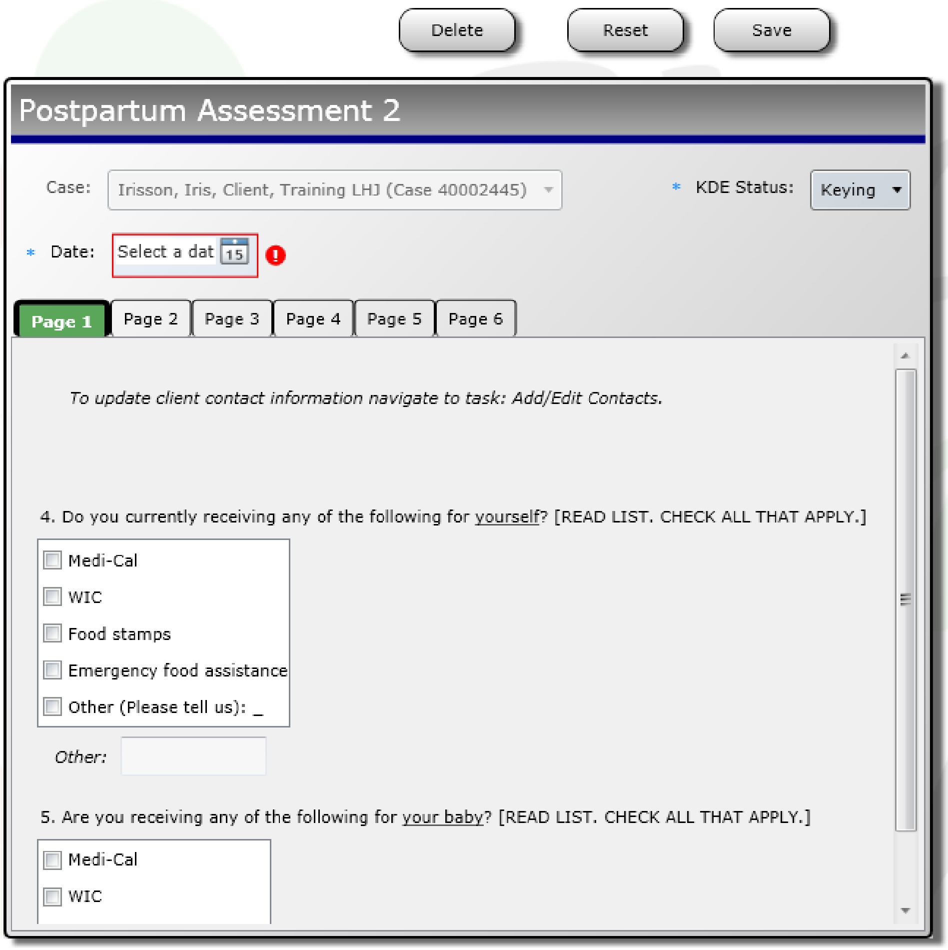
This form will be **filled out during the Intake** if the client has entered the program postpartum.

i) Choose **Postpartum Assessment #1 PPE** from the client's case navigation tree.
ii) Enter the date that the assessment was completed with the client.
iii) Fill in all answers and use the **scroll bar** to see all questions on pages that have more questions than can fit in the window.
iv) Each tab will show the questions from the same numbered page of the BIH Data Book.
v) Click **Save** at any time while you are entering data.
vi) When data entry is complete and correct, change the **KDE Status** to **Done** and click **Save**.



Postpartum Assessment 2

Choose **Postpartum Assessment #2** from the client's case navigation tree and enter and **Save** as usual.



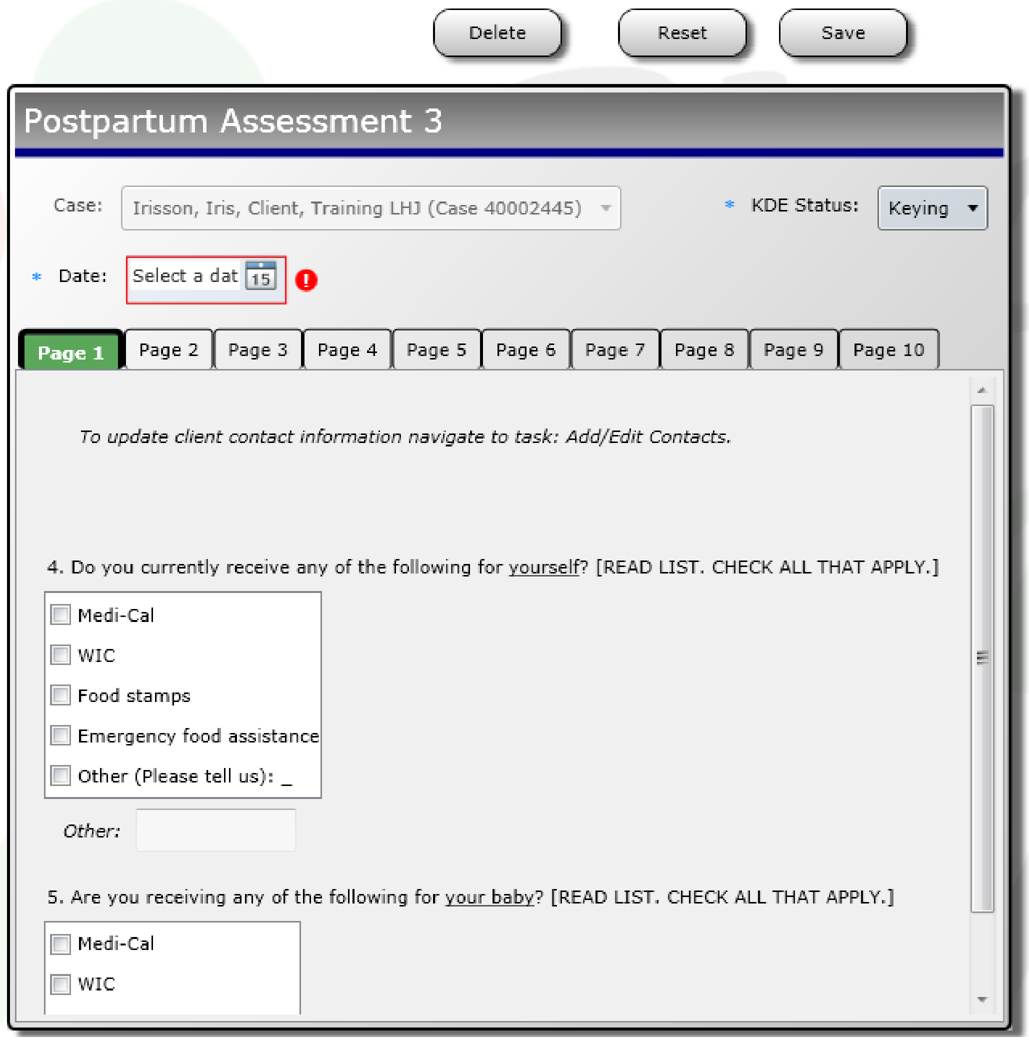
Life Plan

The Life Plan is not entered into the MIS. You can use the **Form Status** window to track the dates initiated, updated and completed. Enter the **Date Initiated**, and each time you work on the plan enter the **Date Last Updated**. When it is completed you will also enter the **Date Completed**.

The following three forms are also completed after Session 20.

Postpartum Assessment 3

Choose **New Postpartum Assessment #3** from the client's case navigation tree, fill in the answers, change the **KDE Status** to **Done** and **Save** as usual.

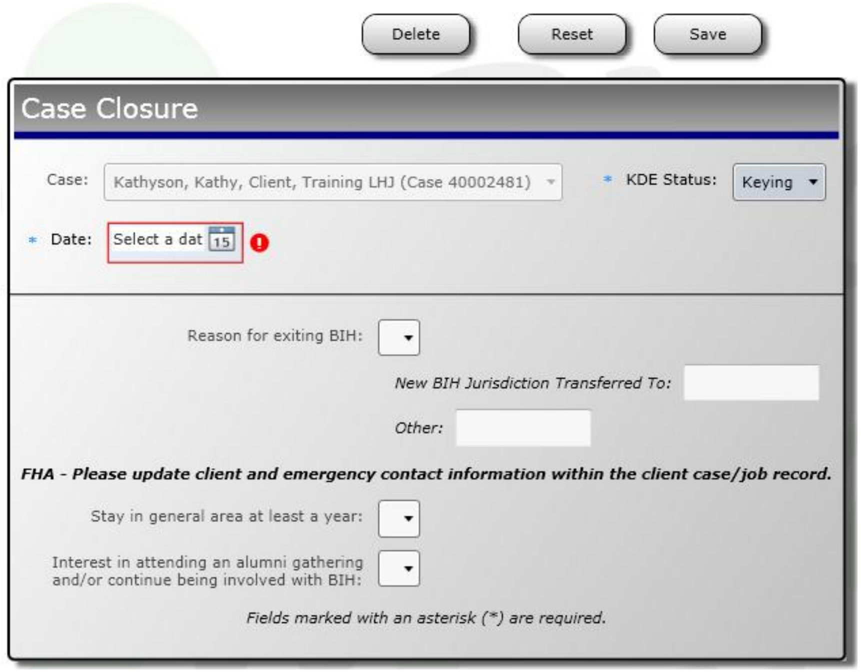


Postpartum Client Satisfaction

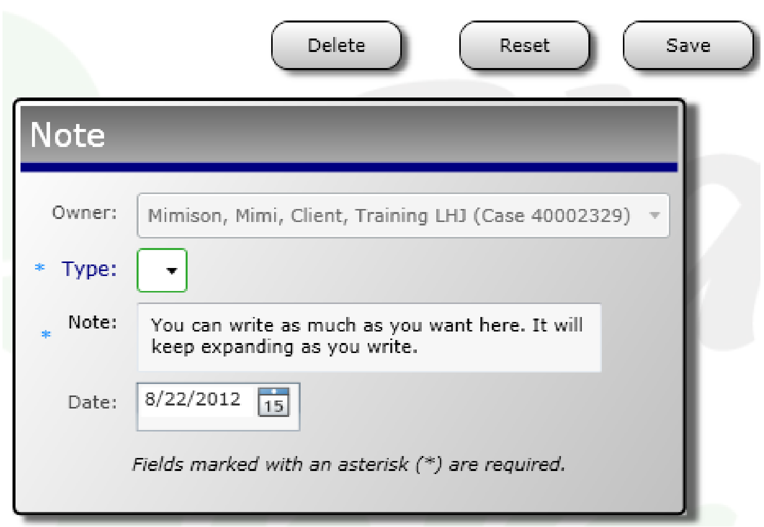
In order to allow a client's answers to be gathered anonymously, the **Prenatal and Postpartum Client Satisfaction forms** have been **moved into** the reporting section for the **Group Sessions** and titled **Evaluations**. See page 53.

Case Closure

This form is to be completed <u>whenever</u> an enrolled client leaves the program. Choose **New Case Closure** from the client's case navigation tree. You can use the **Calendar Page Icon** to choose the closure date or enter the date yourself. When it is all filled in correctly change the **KDE Status** to **Done** and click **Save**



Notes



Many of the forms have a place on the last page for notes, and this **Notes** form is for notes that are needed in addition to the ones connected to particular forms. The note can be as large as needed. Choose the date from the calendar page icon

DATA ENTRY - GROUP SESSIONS

Data Entry - Group Sessions is a separate **Work** area which has several windows that allow you to track the attendance, activities, support and evaluations for the group session intervention of BIH. You can start a new group or work on sessions of a group that has already been started.

1) Group Information

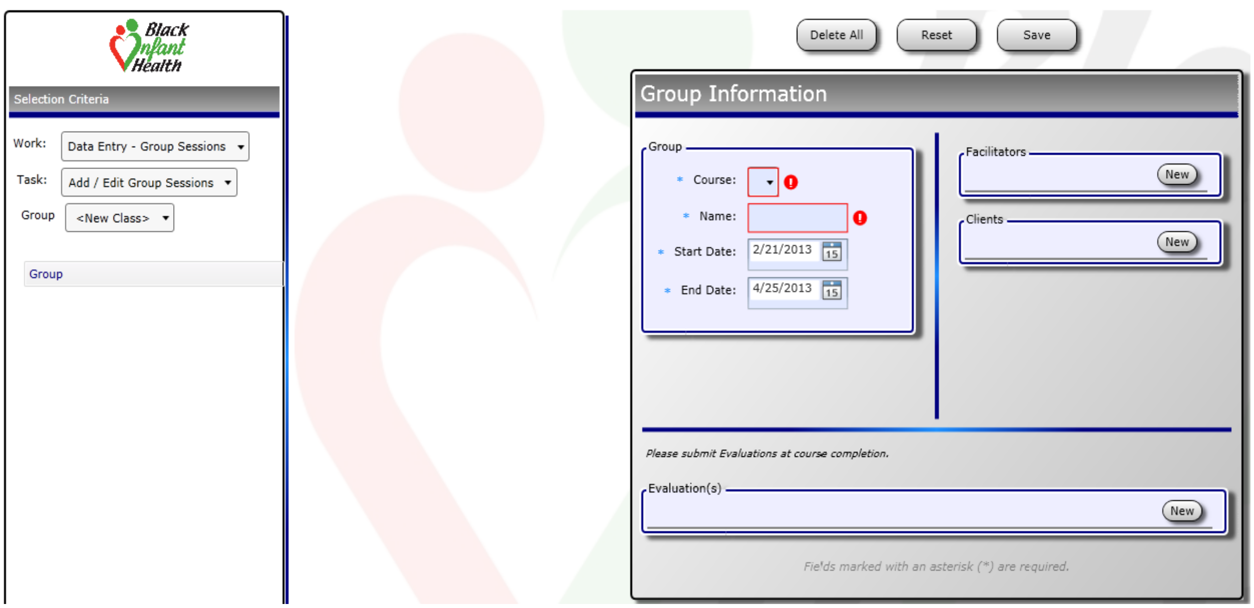
1a) Starting a New Group

To start a new group,

i) Begin by choosing **Data Entry - Group Sessions**,
ii) then **Add/Edit Group Sessions**,
iii) then **<New Group>** from the three pull downs in the **Selection Criteria** window.

The **Group Information** window will then open so that you can fill in the initial information for that group.

To add or edit **sessions** of an already existing group see page 47 for **Session Information.**

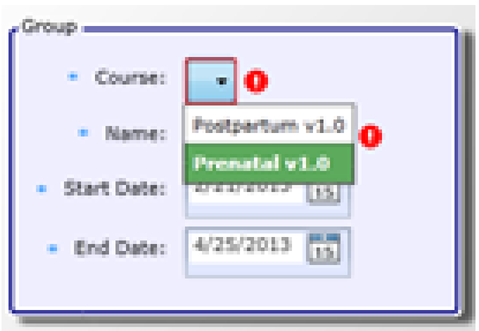


1b) Entering Group Information

i) Choose either **Prenatal v1.0** or **Postpartum v1.0** from the **Course** pull down in the **Group Information Group** window.

ii) Then enter a unique name in the **Group** window including a short version of your LHJ name and the group starting date. e.g. SF Postpartum 5/5 – 7/7/11

iii) When you enter the **Start Date**, the **End Date** will automatically populate for ten sessions.



There must be at least enough time between dates for a maximum of one session per week average. You may add up to ten more weeks to the end date beyond the automatically populated date if needed.

1c) Adding Facilitators and Clients

i) Click the **New** button on the **Facilitators** window.

ii) Click three times in the new space to activate the pull down to choose one of the group facilitators. (Each staff person that serves as a Group Facilitator must have **Group Facilitator** as a **Role** in order to show in the pull down.)

iii) Repeat this process until you have chosen each facilitator needed.

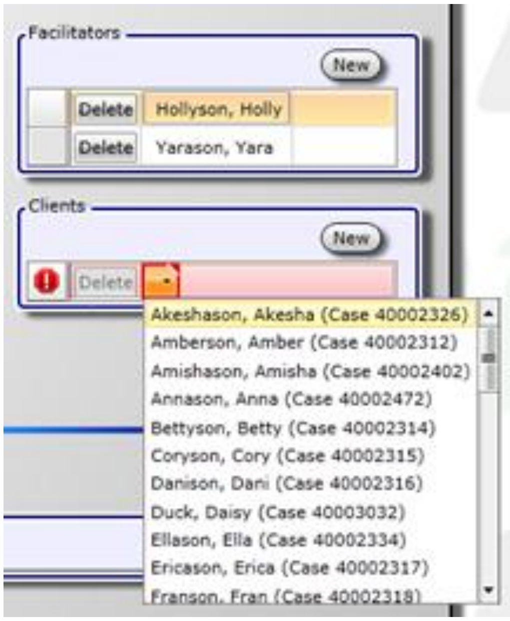
iv) Move to the **Clients** window and click the **New** button,

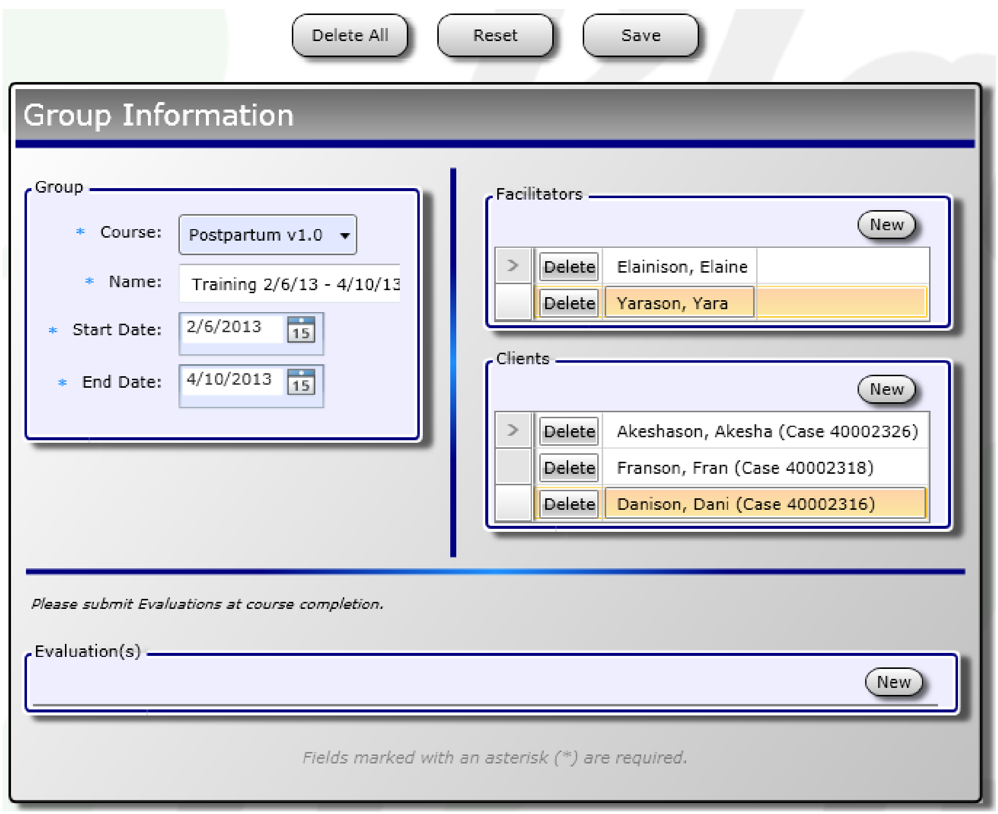
v) Click three times in the new space to open the client case list.

vi) Click on the client's case to choose her.

vii) Continue clicking **New** and choosing another client case until you have all clients listed.

IMPORTANT: A client **must** have a case record created before she can be entered in a group. Additionally if the client has multiple case records, because of different pregnancies, you must choose the correct case record corresponding to the time frame of the group and the client's correct pregnancy. Always remember, a case record is based on the client's pregnancy at that time. <u>Each pregnancy has a separate case.</u>





After you have the **Course**, the **Group name**, the **Dates**, the **Facilitators** and the **Clients** all listed, click the **Save** button to save your work.

After all ten sessions have been completed you will fill in the **Evaluations** (AKA Client Satisfactions) shown at the bottom of the **Group Information** window. See page 53 for more information on the class **Evaluations.**

1d) Removing a Facilitator or Client from Group Information

If you choose the wrong facilitator or client and discover it after you have saved the new person, but before you have entered any attendance record, you can click that person's **Delete** button to remove her.

To delete a client or facilitator from the **Group Information** who has an existing erroneous attendance record you must first remove the attendance record in the **Session Information** windows.

To delete the erroneous attendance record,

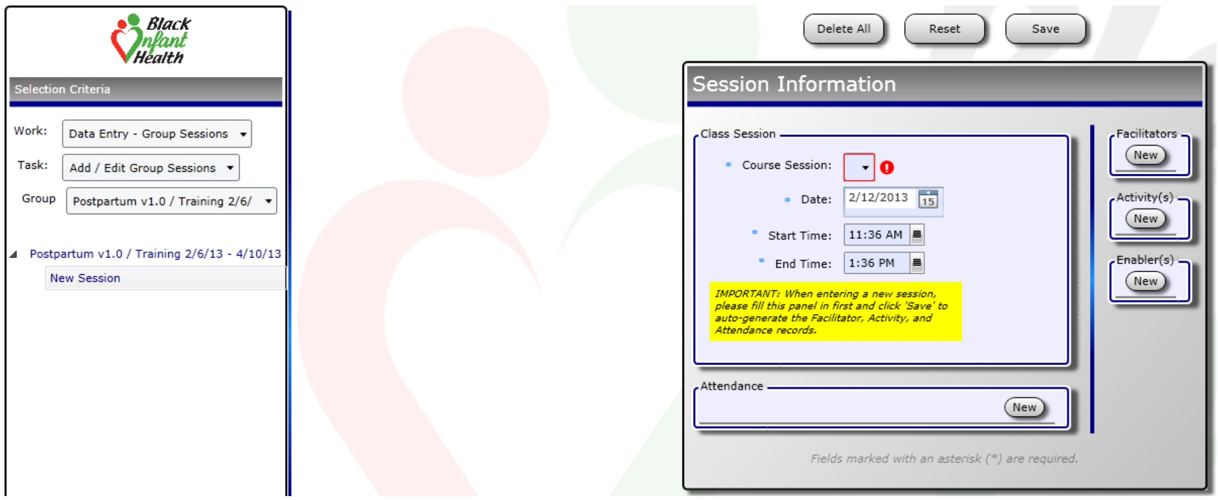
i) Choose the **Group Name** from the Class pull down
ii) From the session tree, choose the first session where the person was listed.
iii) Click the **Delete** button beside that person's name.
iv) Repeat the process for any session where person was listed.
v) When you have removed the person from each session where she was listed, return to the **Group Information** and click the **Delete** button beside the person's name there.

2) Creating Session Information

As soon as you have saved the **Group Information** window, the name of the group will show in in the **Group** list in the **Selection Criteria** window and will also show below the three pull downs as the beginning of the session tree for the group sessions.

The words **New Session** will appear under the name.

Click on **New Session** and the **Session Information** window will open on the right for you to enter appropriate information for the first session.



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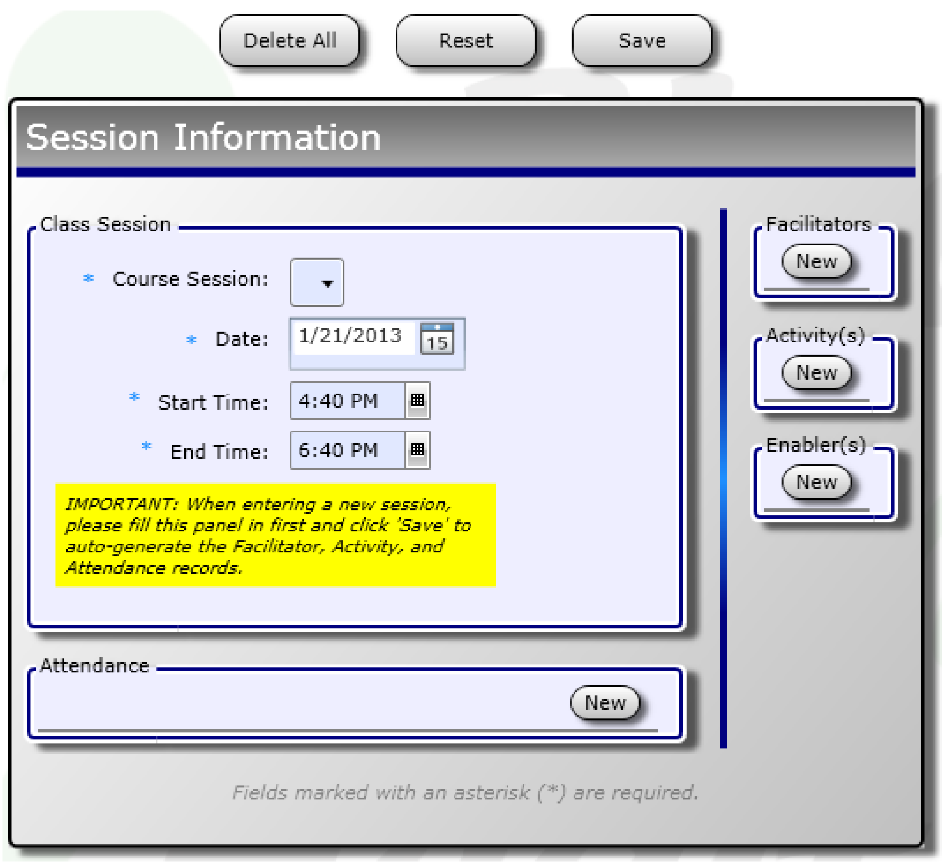
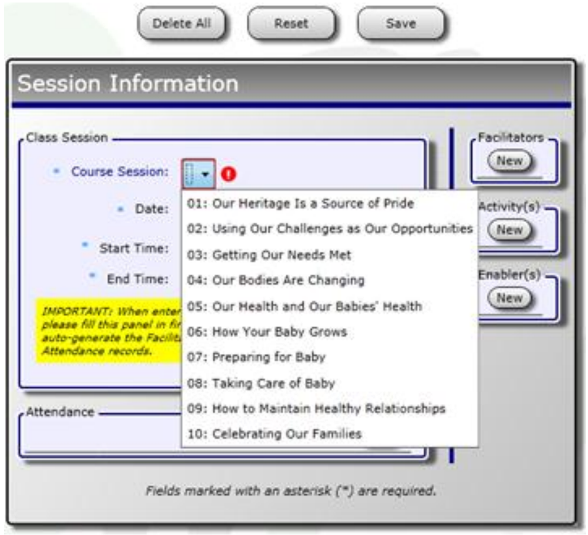
2a) Entering a New Session

i) Click **New Session** in the session tree to open the **Session Information** window, and



ii) Choose the course session from the **Course Session** pull down.



iii) Enter the date of the session. (The **Date** will automatically show the current date – only helpful if you enter it the day of the session.)

iv) Correct the Start Time. (automatically shows when you began work)

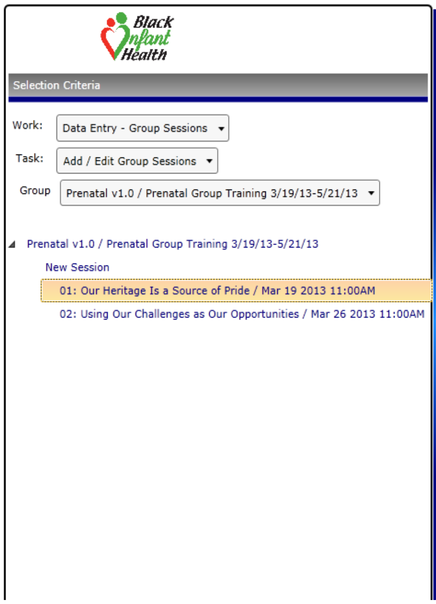
v) Correct the End Time. (automatically shows two hours later than you began work)

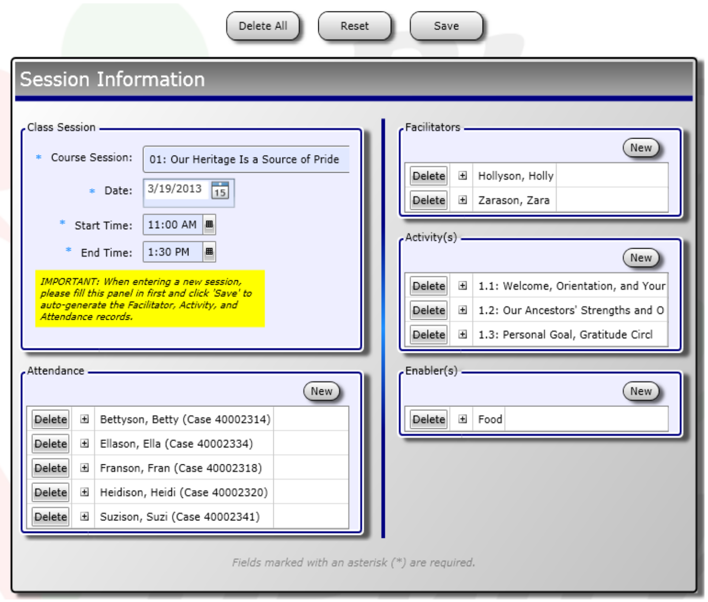
vi) When those are all correct click **SAVE!**

DO NOT MANUALLY ENTER ANY CLIENTS, FACILITATORS or ACTIVITIES in SESSION INFORMATION before clicking Save. When you click **Save** the appropriate windows will automatically populate with all the clients and facilitators you entered in the **Group Information** and all of the **Activities** for the **Session** you chose. Make sure you have the names of all of the clients and facilitators entered into **Group Information** before you do this process. The process works only ONCE, when you first enter the session.

vii) You must **click Save again** to save this information.

It will also populate the name of the session on the session tree in the **Selection Criteria** window.





2b) To Add or Edit a <u>Session</u> Later, After Group information Has Been Entered.

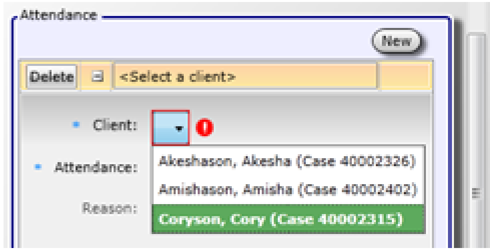
i) Choose **Data Entry – Group Sessions**.
ii) Then choose **Add / Edit Group Sessions**.
iii) Finally use the **Group** pull down to find the appropriate **Group**.
iv) Click the words **New Session** to <u>add</u> the next session. **OR**
v) <u>To edit a session already entered</u>, choose it from the Session Tree and skip to page 50 in this manual.

2c) Data Entry for New Sessions and Editing Existing Sessions

Clients may enter the group up to the third session and facilitators may need to substitute for a facilitator that cannot attend a certain session.

i) Enter the client or facilitator in the **Group Information** window BEFORE you enter the session, if possible. The client or facilitator will show up in the list for that session and each following session.
ii) **OR** If you are not able to enter the client or facilitator before entering the session, click **New** on the client or facilitator window.
iii) Click the **+** sign next to **<Select a client>** or **<Select a group facilitator>** to open the new entry.
iv) Click the **Client** or **Facilitator** pull down to find the person's name.
v) Click on the name to choose that person.

vi) Click the **–** sign to close the person’s entry.



2d) Attendance Record

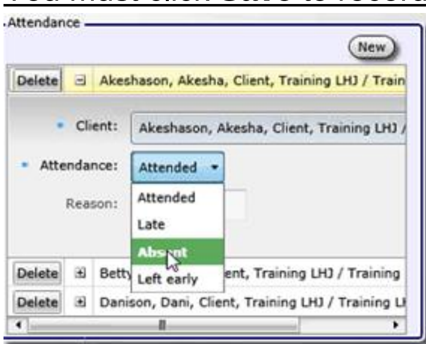
<u>All of the clients listed in the **Attendance** window will automatically be listed as **Attended**</u>,

<u>After the session you will **only change** the information on any clients who may have come late, been absent or had to leave early</u>.

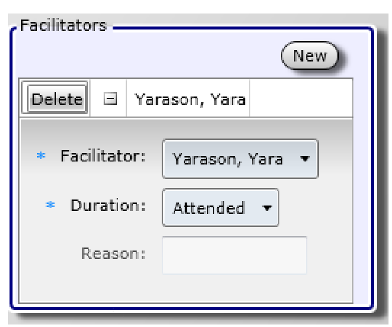
To change that information,

i) Click the **+** sign in front of the client’s name in the **Attendance** window
ii) Click the down arrow next to **Attended**
iii) Choose **Late, Absent, or Left early** from the pull down.
iv) Write in the reason, if known.
v) Repeat for any other client who was late or absent, or left early

<u>You must click **Save** to record attendance whether changed or not.</u>



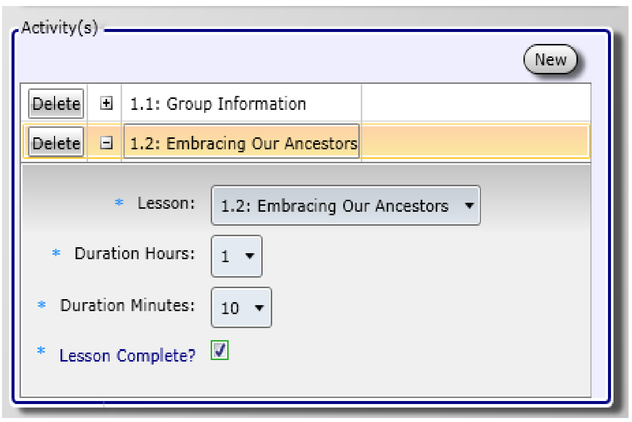
Facilitators have a similar pull down to record attendance in the **Facilitators** window.

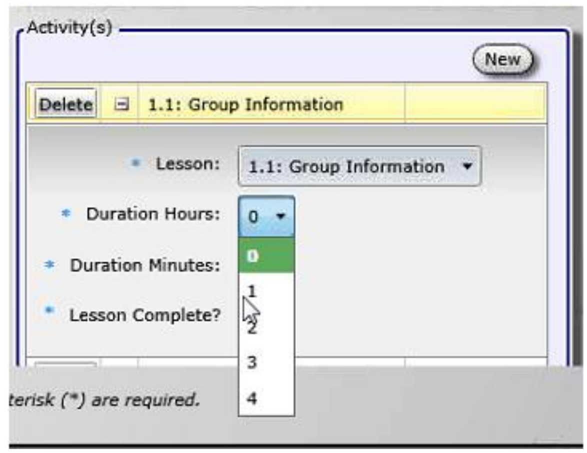


2e) Recording Activities

The activities for each session will be listed automatically in the **Activity(s)** window.

i) To enter information into the **Activity(s)** window click the plus sign **+** in front of the activity you want to choose and it will open that activity.
ii) For each of the activities in a session, choose how long the activity lasted with the **Duration Hours** and / or **Minutes** pull downs in the **Activity(s)** window.
iii) Check the **Lesson Complete** box if you were able to complete the activity.
iv) Click the **–** sign to close each activity



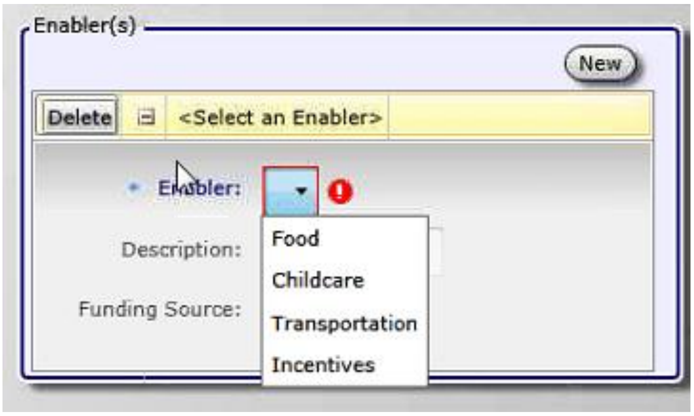


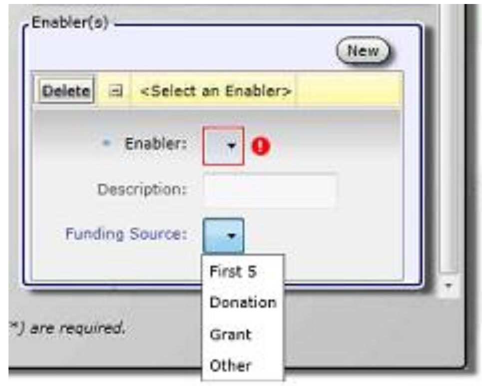
You no longer need to document the Likes and Dislikes for each session in the MIS.

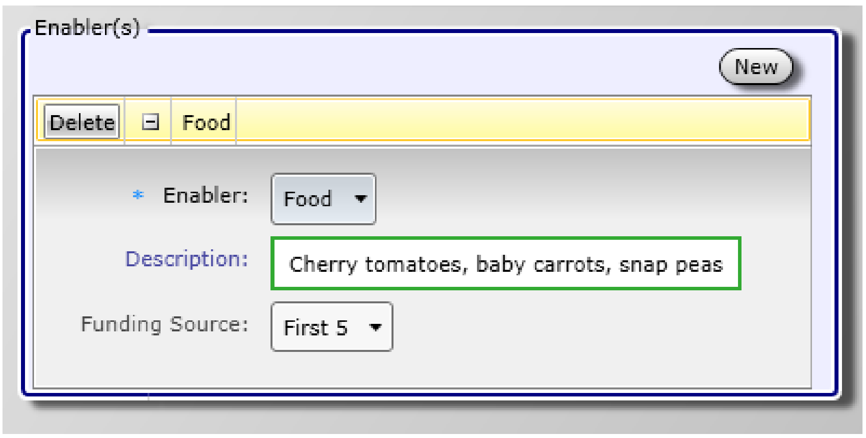
2f) Enablers

To complete work for each session you will also need to enter any enablers that were used for the session in **Enabler(s)** window. They cannot be entered automatically.

i) Click **New** in the **Enabler** window
ii) Click the **+** sign next to the **Delete** button to open each enabler entry window.
iii) Use the **Enabler** pull down to select the type of enabler.
iv) Write the description of the enablers.
v) Then use the **Funding Source** pull down to choose the support.
vi) Close each **Enabler** by clicking the **–** sign.
vii) Repeat for each different type of enabler.







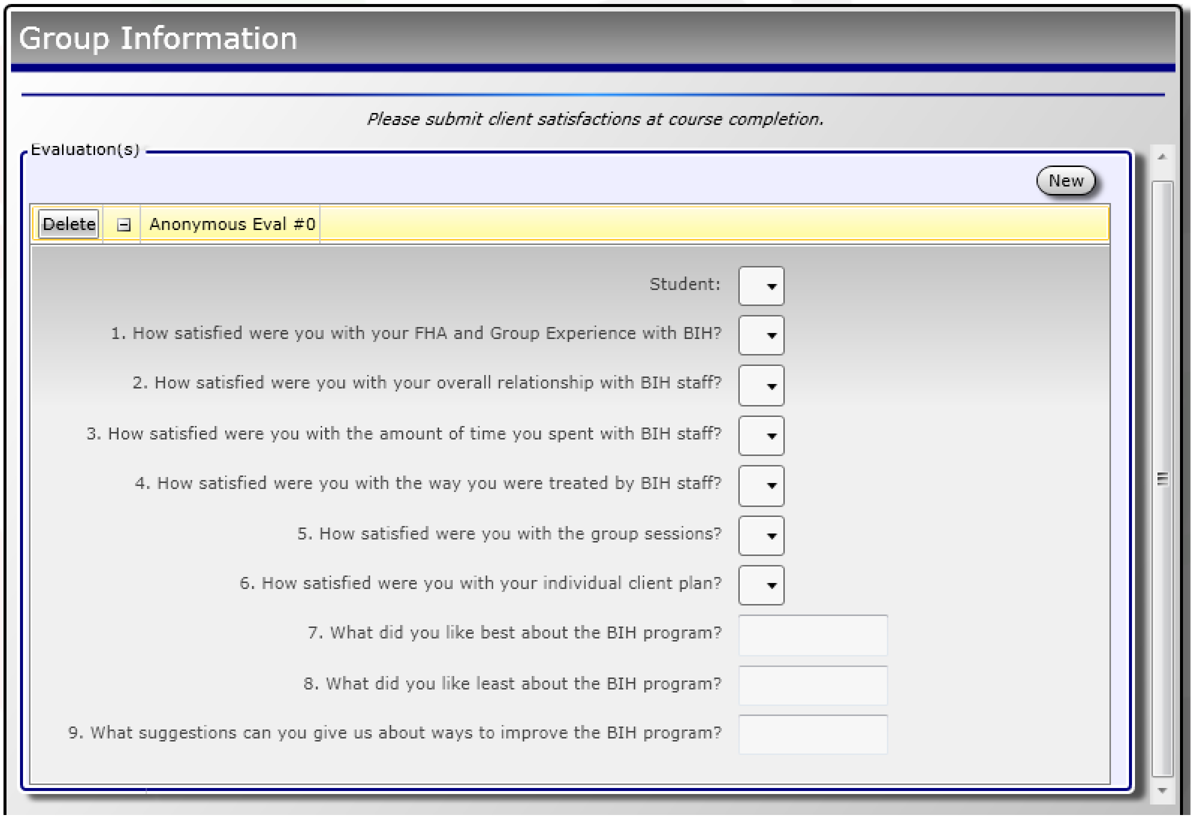
Save

You can click the **Save** button as often as you like as you enter the different portions of the session. <u>Be sure to click **Save** again when you have completed all your entries</u> in the **Session Information** window.

3) Evaluation(s) (aka Prenatal or Postpartum Client Satisfactions)

When you have completed all ten sessions and have the evaluations that the clients filled out, go back to the **Group Information** window to enter those evaluations.

i) <u>Click on the name of the **group**</u> in the session tree on the **Selection Criteria** window to bring up the **Group Information** window.
ii) Click and drag up the blue line above the Evaluation(s) so you can see the whole list of questions to be entered.
iii) Click **New** to enter an evaluation,
iv) click the **+** sign to open the entry screen.

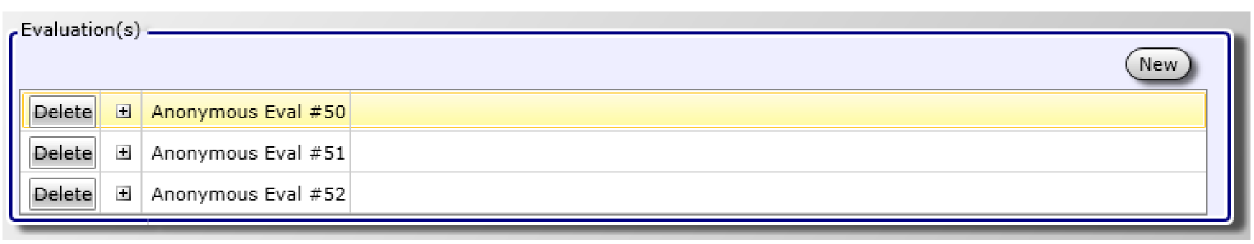


v) Enter a client's name by using the first pull down to open the client list. (If the evaluation is anonymous leave the field blank.)

vi) Choose the level of satisfaction from each of the other pull downs

vii) Enter what has been written for the last three questions.

viii) It is best to **Save** after each evaluation, but not essential as long as you **Save** at the end.



REPORTS (coming summer 2013)

ANALYZE

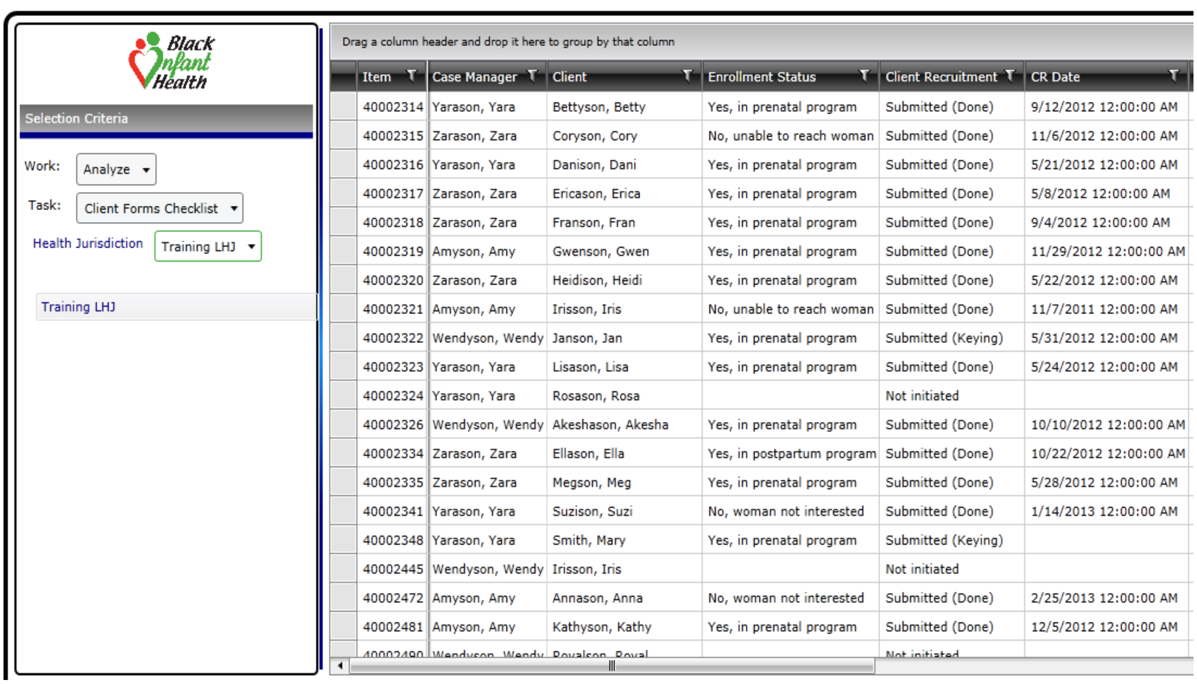
The **Analyze** section of the MIS provides you with grids which show all of your clients and information from selected forms which have been entered into the MIS, in columns following the clients' names column. The information can be grouped, filtered and exported to Excel. Each of the Analyzers will function in essentially the same way

1) Client Forms Checklist

1a) To find the **Client Forms Checklist** (as an example of how to use the Analyzers)

i) Use the **Work** pull down to choose **Analyze**.
ii) Then use the **Task** pull down to choose **Client Forms Checklist**.
iii) Finally, use the third pull down, which now says **Health Jurisdiction,** to choose your LHJ.

The Client Forms Checklist shows all of your clients (both outreach-only and enrolled), case managers and the forms that need to be entered into the MIS. The enrollment status of each of the clients and the completion status (**KDE Status**) and dates of collection for each of the forms are shown following the clients' names column. A form may be **Not initiated**, **Submitted (Keying)** or **Submitted (Done).** Only those forms that are **Submitted (Done)** will be included in future reports.



Item	Case Manager	Client	Enrollment Status	Client Recruitment	CR Date
40002314	Yarason, Yara	Bettyson, Betty	Yes, in prenatal program	Submitted (Done)	9/12/2012 12:00:00 AM
40002315	Zarason, Zara	Coryson, Cory	No, unable to reach woman	Submitted (Done)	11/6/2012 12:00:00 AM
40002316	Yarason, Yara	Danison, Dani	Yes, in prenatal program	Submitted (Done)	5/21/2012 12:00:00 AM
40002317	Zarason, Zara	Ericason, Erica	Yes, in prenatal program	Submitted (Done)	5/8/2012 12:00:00 AM
40002318	Zarason, Zara	Franson, Fran	Yes, in prenatal program	Submitted (Done)	9/4/2012 12:00:00 AM
40002319	Amyson, Amy	Gwenson, Gwen	Yes, in prenatal program	Submitted (Done)	11/29/2012 12:00:00 AM
40002320	Zarason, Zara	Heidison, Heidi	Yes, in prenatal program	Submitted (Done)	5/22/2012 12:00:00 AM
40002321	Amyson, Amy	Irisson, Iris	No, unable to reach woman	Submitted (Done)	11/7/2011 12:00:00 AM
40002322	Wendyson, Wendy	Janson, Jan	Yes, in prenatal program	Submitted (Keying)	5/31/2012 12:00:00 AM
40002323	Yarason, Yara	Lisason, Lisa	Yes, in prenatal program	Submitted (Done)	5/24/2012 12:00:00 AM
40002324	Yarason, Yara	Rosason, Rosa		Not initiated	
40002326	Wendyson, Wendy	Akeshason, Akesha	Yes, in prenatal program	Submitted (Done)	10/10/2012 12:00:00 AM
40002334	Zarason, Zara	Ellason, Ella	Yes, in postpartum program	Submitted (Done)	10/22/2012 12:00:00 AM
40002335	Zarason, Zara	Megson, Meg	Yes, in prenatal program	Submitted (Done)	5/28/2012 12:00:00 AM
40002341	Yarason, Yara	Suzison, Suzi	No, woman not interested	Submitted (Done)	1/14/2013 12:00:00 AM
40002348	Yarason, Yara	Smith, Mary	Yes, in prenatal program	Submitted (Keying)	
40002445	Wendyson, Wendy	Irisson, Iris		Not initiated	
40002472	Amyson, Amy	Annason, Anna	No, woman not interested	Submitted (Done)	2/25/2013 12:00:00 AM
40002481	Amyson, Amy	Kathyson, Kathy	Yes, in prenatal program	Submitted (Done)	12/5/2012 12:00:00 AM
40002490	Wendyson, Wendy	Royalson, Royal		Not initiated	

Use the slider bar at the bottom of the window to see all the forms.

1b) Group by Heading

It is possible to group any of the **Analyzers** by one or more of the headings. For example, to group initially by case manager:

i) Choose **Analyze** in the **Work** list.
ii) Choose the Analyzer you want from the **Task** list.
iii) Choose your LHJ from the **Health Jurisdiction** list.
iv) Click and drag to pull the **Case Manager** heading up above the **Item** list as shown in the screen shot below. The item list now shows all the LHJ Case Managers and how many assigned cases they have in the MIS.
v) Click on the down arrow to the left of the Case Manager's name to see all of their clients.
vi) Use the slider bar at the bottom to see all of the forms for each client.

A Case Manager can use this to see which forms have been completed and which need to be started or completed in the MIS.

Grouped by: Case Manager

Item	Case Manager	Client	Enrollment Status	Client Recruitment	CR Date
Amyson, Amy 5					
40002319	Amyson, Amy	Gwenson, Gwen	Yes, in prenatal program	Submitted (Done)	11/29/2012 12:00:00 AM
40002321	Amyson, Amy	Irisson, Iris	No, unable to reach woman	Submitted (Done)	11/7/2011 12:00:00 AM
40002472	Amyson, Amy	Annason, Anna	No, woman not interested	Submitted (Done)	2/25/2013 12:00:00 AM
40002481	Amyson, Amy	Kathyson, Kathy	Yes, in prenatal program	Submitted (Done)	12/5/2012 12:00:00 AM
40002689	Amyson, Amy	Monicason, Monica	Yes, in postpartum program	Submitted (Done)	1/28/2013 12:00:00 AM
Brendason, Brenda 1					
Hollyson, Holly 1					

The screenshot below has been grouped by Enrollment Status as listed in the Recruitment form. You can group by any heading.

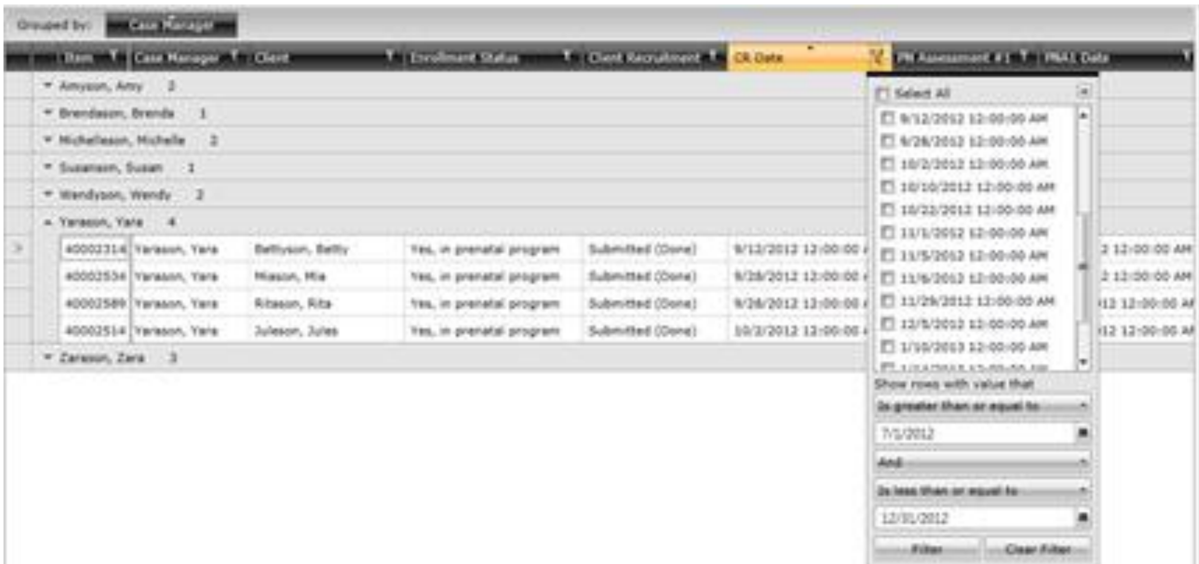
Grouped by: Enrollment Status

Item	Case Manager	Client	Enrollment Status	Client Recruitment	CR Date
10					
No, staff decided that womans needs could not be met by BIH (if woman referred to other services, please specify ___) 1					
No, unable to reach woman 3					
No, woman not interested 2					
Yes, in postpartum program 2					
40002334	Zarason, Zara	Ellason, Ella	Yes, in postpartum program	Submitted (Done)	10/22/2012 12:00:00 AM
40002689	Amyson, Amy	Monicason, Monica	Yes, in postpartum program	Submitted (Done)	1/28/2013 12:00:00 AM
Yes, in prenatal program 19					

1c) To group by more than one Heading– (drilling down):

i) Choose the first Heading you want to use and drag up to the “Group by” position.
ii) Choose the next Heading and drag it up beside the first heading.

1d) Filtering



i) Group by Case Manager or other heading.
ii) Choose the column that you want to filter (here the Client Recruitment Date)
iii) Left click on the tack on the heading bar
iv) To choose between two dates, first choose the value – here greater or equal to.
v) Then choose the start date from the calendar icon.
vi) Then choose the ending value – here less than or equal to and choose the desired end date.

1e) Exporting to Excel

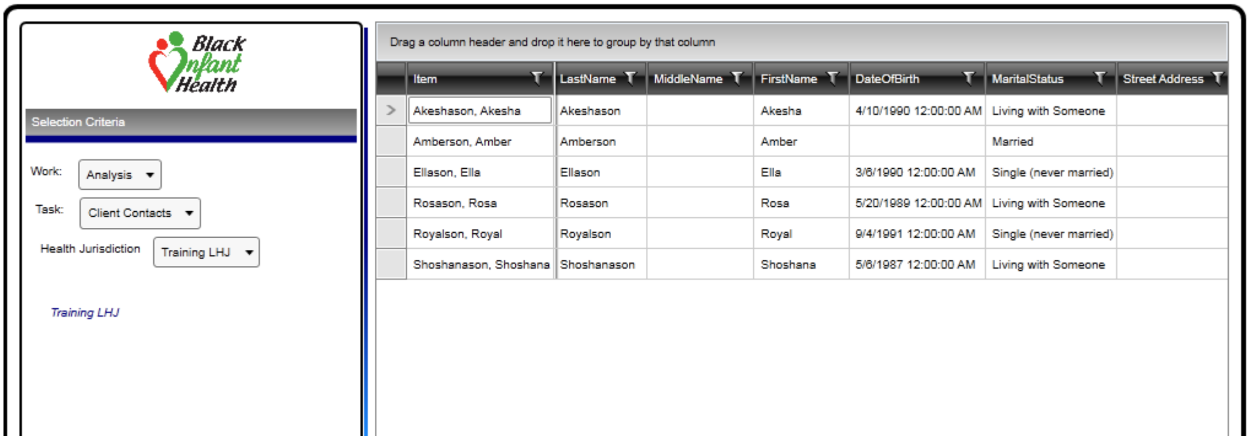
i) Right click anywhere on the Analyzer grid and you will see the word **Export**.
ii) Click on **Export**.
iii) Choose where you want to save the Excel.
iv) Enter the name for the file.
v) Click **Save**.

2) Client Contacts

A second Analyzer in the **Analyze** work area may help you to find clients entered from your LHJ in case a person may have changed their last name or be entered with a different spelling. It helps to find the current information to contact your clients.

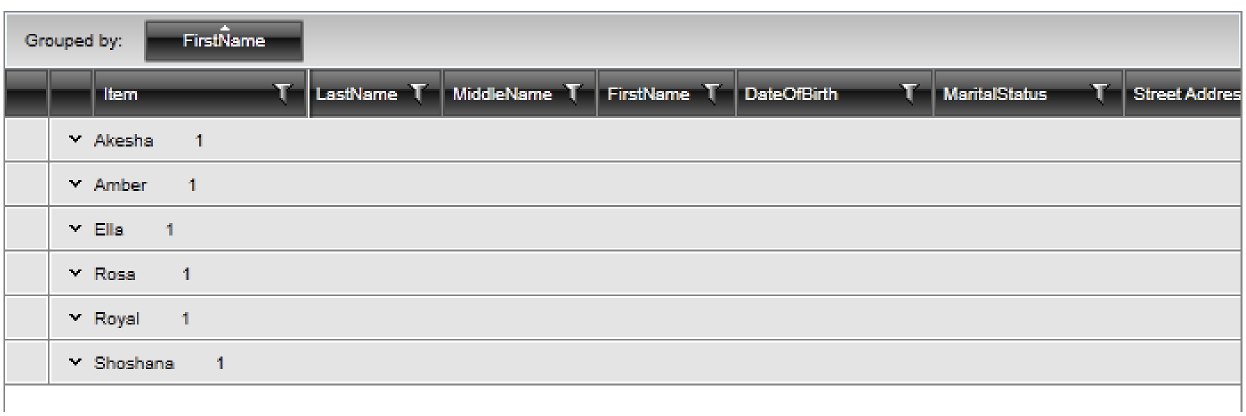
2a) To find the Client Contacts analyzer

i) Choose **Analyze**.
ii) Choose **Client Contacts**.
iii) Choose your **Health Jurisdiction** as shown below.



Item	LastName	MiddleName	FirstName	DateOfBirth	MaritalStatus	Street Address
Akeshason, Akesha	Akeshason		Akesha	4/10/1990 12:00:00 AM	Living with Someone	
Amberson, Amber	Amberson		Amber		Married	
Ellason, Ella	Ellason		Ella	3/6/1990 12:00:00 AM	Single (never married)	
Rosason, Rosa	Rosason		Rosa	5/20/1989 12:00:00 AM	Living with Someone	
Royalson, Royal	Royalson		Royal	9/4/1991 12:00:00 AM	Single (never married)	
Shoshanason, Shoshana	Shoshanason		Shoshana	5/6/1987 12:00:00 AM	Living with Someone	

Clients can be grouped by **Last name, First Name, Date of Birth** or any of the other columns by dragging the appropriate **Column Heading** above the **Item Heading**. If there is more than one person with the First name or Date of Birth, etc. click the ^ beside it to show all.



This Analyzer is particularly helpful to determine what vital information is missing on your clients such as **Date of Birth** and **Marital Status.** It is also a useful tool to see if you have entered duplicate client contact records that are the same person.

NOTE: If you just want to look someone up to see if they have been entered as a contact or to work on their case it may be easier to find them in the **Data Entry - Case Management** work area under **Add / Edit Contacts**, **Add / Edit Cases by Client** or **Add/ Edit Cases by BIH Case Number.**

People in **Add / Edit Contacts** and **Add / Edit Cases by Client** are listed in alphabetical order by last name. People in **Add/ Edit Cases by BIH Case Number** are listed in numerical order by case number.