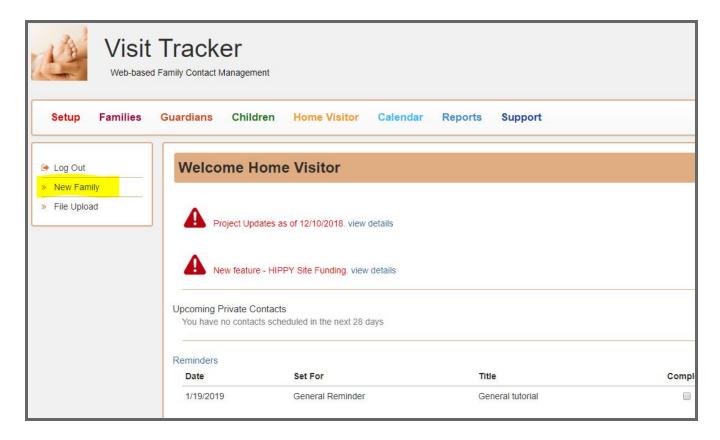
## **NEW FAMILY**

In this tutorial, we'll cover the steps to enter a new family, more than 1 guardian and children.

## **ENTERING A NEW FAMILY**

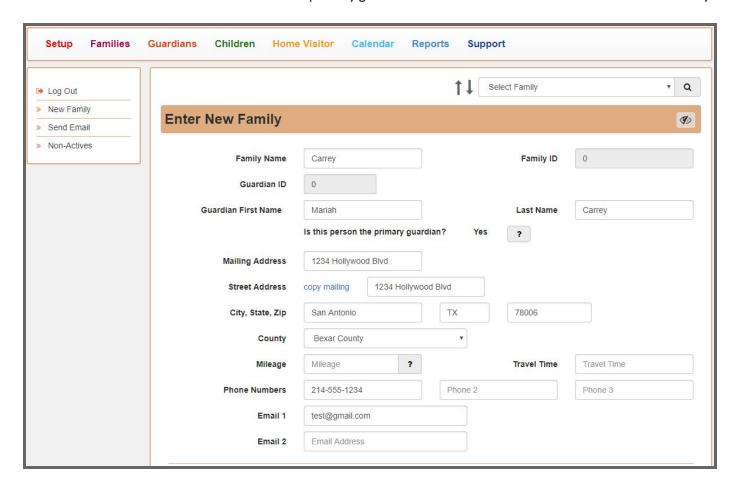
- From your home page, click on "New Family" (highlighted) to begin
- Note: The "New Family" link can also be found in "Families" tab



The "New Family" page opens up. Start entering information

#### Notes

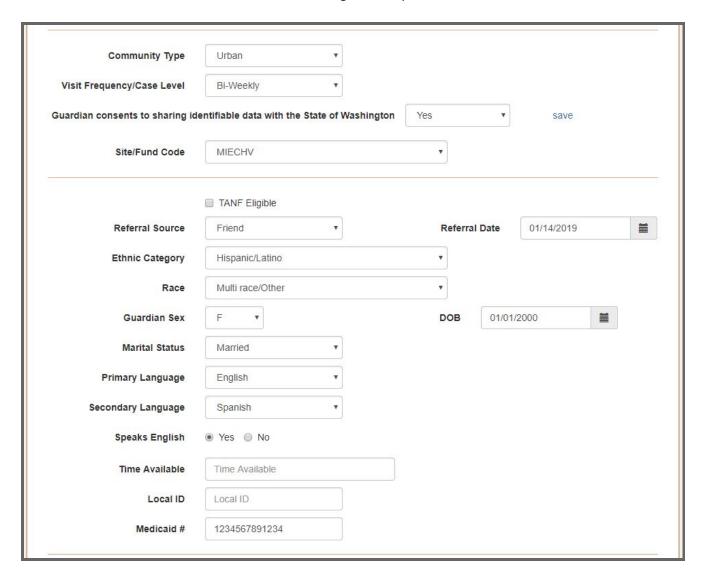
- The Family Name is manually entered and can be changed if needed. The Family ID will be assigned by Visit Tracker and cannot be changed.
- The guardian entered at this point will be set as the Primary Guardian but can be edited later once other guardians are added to the family.
- RULE: All families have to have a primary guardian. Only 1 guardian can be the primary guardian.
- RULE: The contact information set for the primary guardian will also be the contact information for the family.



## **NEW FAMILY continued**

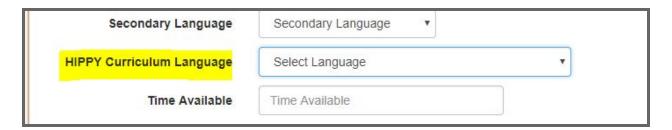
### Notes

- Site/Fund Code is set at the family level.
- The fields from **Referral Source** to **Medicaid** # are guardian specific fields



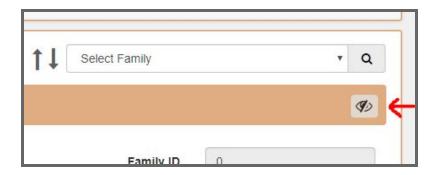
# \*HIPPY Programs\*

• HIPPY Curriculum Language will display underneath Secondary Language



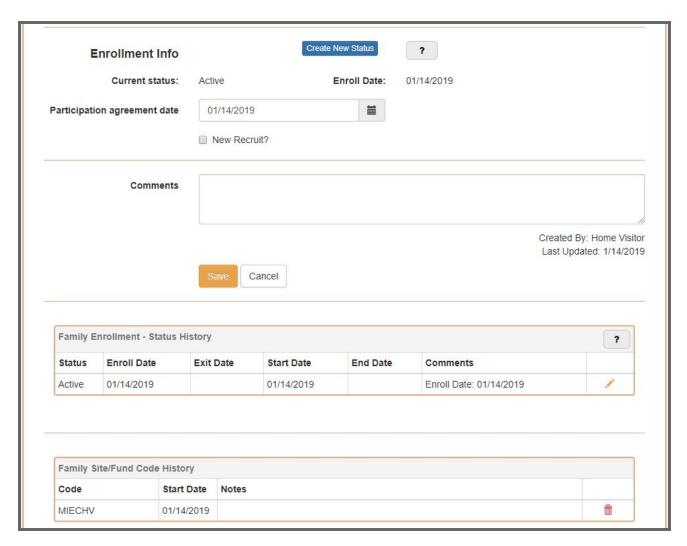
# **TIP**: Are you seeing some fields that your program doesn't use?

Anytime you see this symbol, it means there are fields on the page that can be turned off and on. Check with your Main Admin about any field in question. It may be something you can simply "turn off".



The final step is to enter the Enrollment Info. In this example, the family was set to Active and the page was saved.

Once saved, the **Family Enrollment - Status History** and **Family Site/Fund Code History** tables will display. Here you can manage current status and code



Next, let's enter another guardian that will also be participating in the program.

#### **ADDITIONAL GUARDIANS**

After saving your new family and the primary guardian, go to **Family Home** or **Guardians & Children** to enter a 2nd guardian.

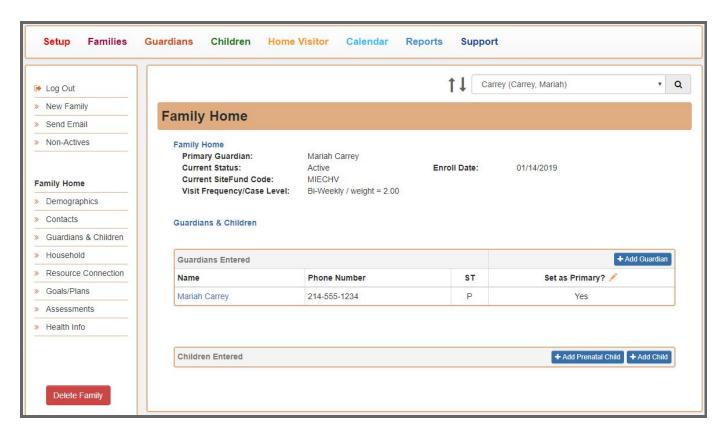
NOTE: Guardians & Children will take you to the Family Home page



Here's a look at the **Family Home** page. On this page:

- Will display the current Status and Site/Fund Code along with some other information
- Displays all guardians and children participating in the family. Here is where you can add a 2nd guardian

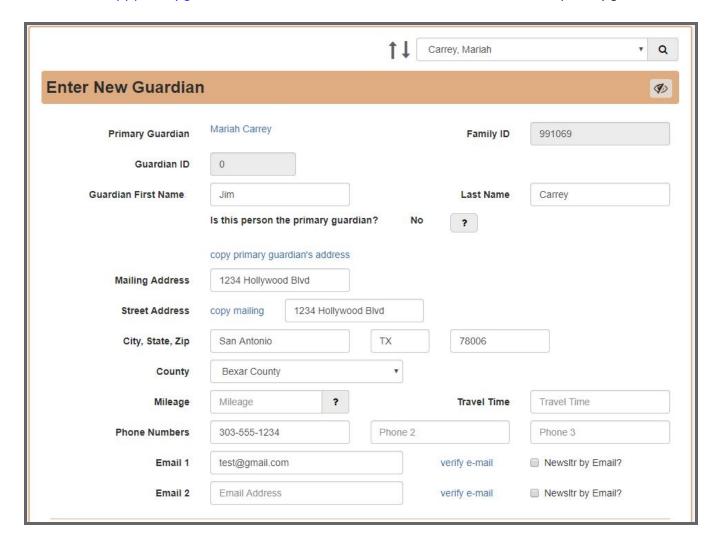
To add a 2nd guardian, click "+Add Guardian".



## **NEW GUARDIAN**

A few things to point out about the **Enter New Guardian** page:

- Primary guardian is listed at the top
- Primary guardian designation is set to "No" and can be managed from the Family Home page
- Choose "copy primary guardian's address" to add the same address entered from the primary guardian.

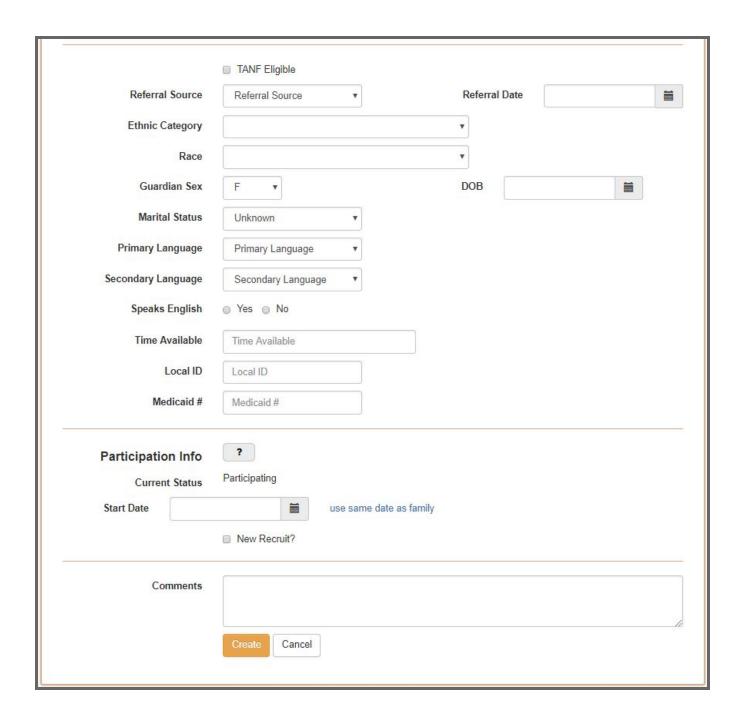


This next section is family level and can only be edited from the primary guardian's data page



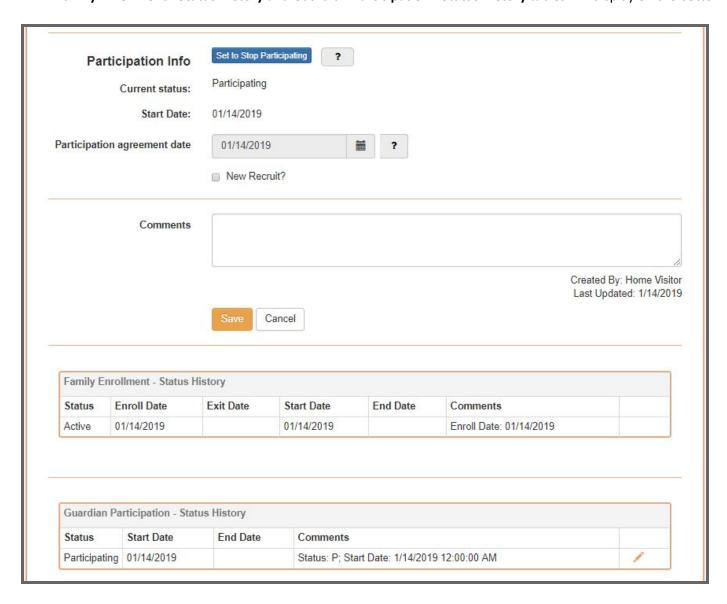
Complete the rest of the information for the guardian.

- Participation Info
  - o Select the start date for when the guardian is added to the family and begins participating
  - o Choose "use same date as family" if the guardian is enrolling at the same time as the family's Enroll Date



Here's a view of what the guardian's data page looks at the bottom after saving all information

- Current status is set to Participating
- Family Enrollment Status History and Guardian Participation Status History tables will display on the bottom



#### **ADD A CHILD**

Now let's add a child to the family

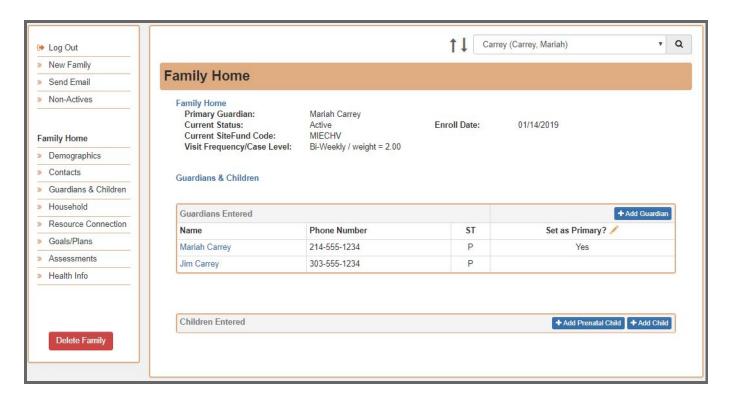
• From the guardian that was just created, click "Family Home"



Select 1 of the 2 add child options on the bottom right of the Family Home page

- Select +Add prenatal child if the child has not been born yet
- Select +Add Child if the child has been born. You'll still be able to prenatal information for this child

In this example, we'll select "+Add child"

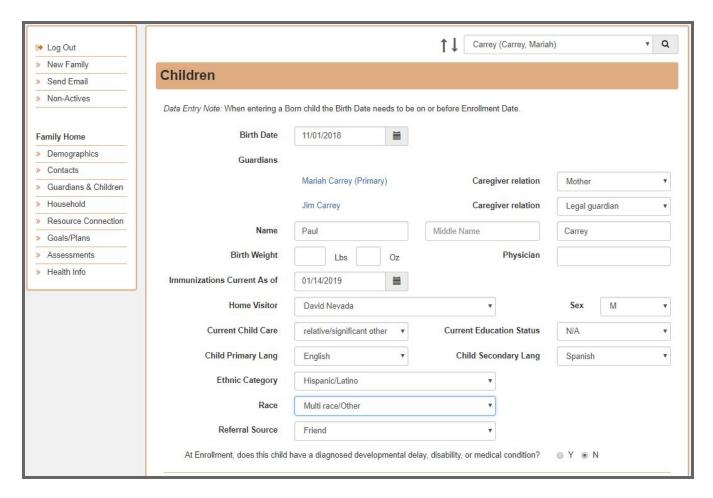


## **NEW CHILD**

Enter the child's information.

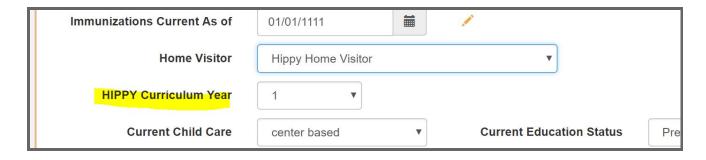
The new child entry page is still in the Families section. Notice that the family is displayed at the top right.

**NOTE**: **Caregiver relation** will be designated for each guardian in the family. The selections are now based on each guardian's relationship to the child.



## \*HIPPY Programs\*

HIPPY Curriculum Year will display underneath Home Visitor

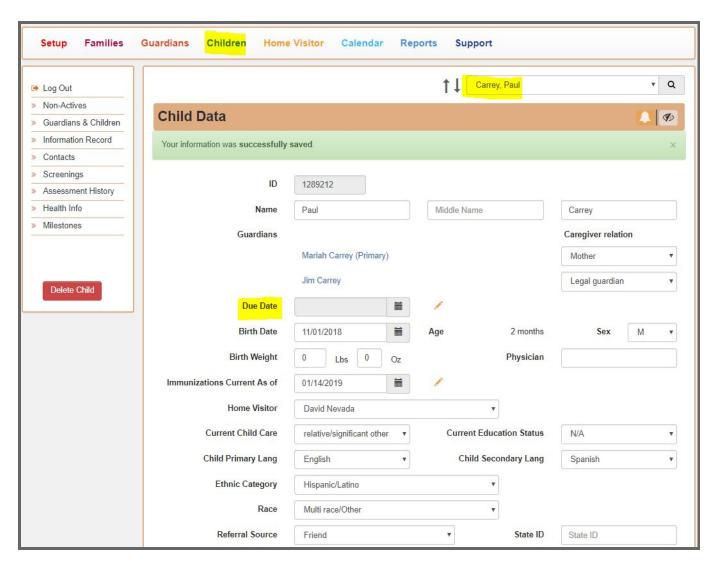


Complete the child's Enrollment Info and click "Create".

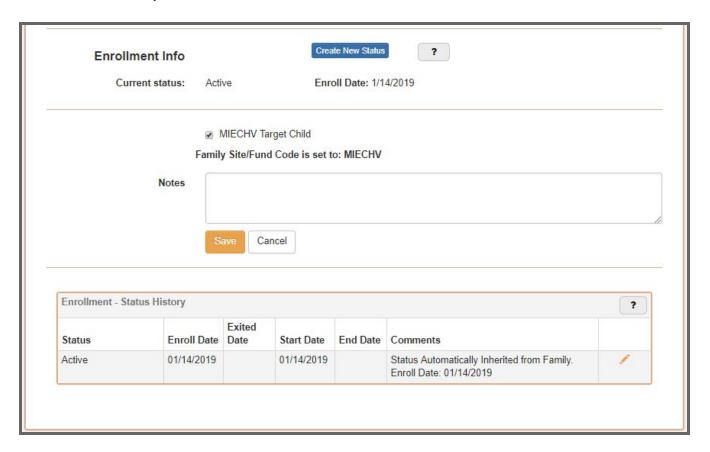


Now that the child has been saved, notice that you are redirected to the child's data page in the **Children** section. Here you can add some additional information like **Due Date**.

Click on **Guardians & Children** in the left navigation to return to the **Family Home** page.



After creating the child, the child's **Enrollment Inf**o will be displayed at the bottom of the page along with the **Enrollment - Status History** table for the child



Here's a look at the family that was just created from the **Family Home** page.

