

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 screenshot shows the 'Visit Tracker' web application interface. The header includes the logo (a pair of hands holding a foot) and the title 'Visit Tracker' with the subtitle 'Web-based Family Contact Management'. A navigation menu at the top contains links for Setup, Families, Guardians, Children, Home Visitor, Calendar, Reports, and Support. On the left side, there is a sidebar with a 'Log Out' button and three menu items: 'New Family' (highlighted in yellow), 'File Upload', and another 'File Upload' item. The main content area features a 'Welcome Home Visitor' banner, followed by two notification boxes with red warning icons: 'Project Updates as of 12/10/2018. view details' and 'New feature - HIPPY Site Funding. view details'. Below these is a section for 'Upcoming Private Contacts' stating 'You have no contacts scheduled in the next 28 days'. At the bottom, there is a 'Reminders' table.

| Date | Set For | Title | Compl |
|-----------|------------------|------------------|--------------------------|
| 1/19/2019 | General Reminder | General tutorial | <input type="checkbox"/> |

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.

The screenshot shows a web application interface for entering a new family. At the top, there is a navigation bar with links: Setup, Families, Guardians, Children, Home Visitor, Calendar, Reports, and Support. On the left side, there is a sidebar with a 'Log Out' button and three expandable menu items: 'New Family', 'Send Email', and 'Non-Actives'. The main content area is titled 'Enter New Family' and contains a form with the following fields and values:

| | | | |
|--------------------------------------|---------------------|---------------------|---------|
| Family Name | Carrey | Family ID | 0 |
| Guardian ID | 0 | | |
| Guardian First Name | Mariah | Last Name | Carrey |
| Is this person the primary guardian? | Yes | | ? |
| Mailing Address | 1234 Hollywood Blvd | | |
| Street Address | copy mailing | 1234 Hollywood Blvd | |
| City, State, Zip | San Antonio | TX | 78006 |
| County | Bexar County | | |
| Mileage | Mileage | | ? |
| Travel Time | Travel Time | | |
| Phone Numbers | 214-555-1234 | Phone 2 | Phone 3 |
| Email 1 | test@gmail.com | | |
| Email 2 | Email Address | | |

NEW FAMILY continued

Notes

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

| | | |
|---|---|--------------------------|
| Community Type | Urban | |
| Visit Frequency/Case Level | Bi-Weekly | |
| Guardian consents to sharing identifiable data with the State of Washington | Yes | save |
| Site/Fund Code | MIECHV | |
| <input type="checkbox"/> TANF Eligible | | |
| Referral Source | Friend | Referral Date 01/14/2019 |
| Ethnic Category | Hispanic/Latino | |
| Race | Multi race/Other | |
| Guardian Sex | F | DOB 01/01/2000 |
| Marital Status | Married | |
| Primary Language | English | |
| Secondary Language | Spanish | |
| Speaks English | <input checked="" type="radio"/> Yes <input type="radio"/> No | |
| Time Available | Time Available | |
| Local ID | Local ID | |
| Medicaid # | 1234567891234 | |

HIPPA Programs

- HIPPA Curriculum Language will display underneath Secondary Language

| | |
|----------------------------------|--------------------|
| Secondary Language | Secondary Language |
| HIPPA Curriculum Language | Select Language |
| Time Available | Time Available |

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

Enrollment Info

[Create New Status](#) ?

Current status: Active **Enroll Date:** 01/14/2019

Participation agreement date 01/14/2019

New Recruit?

Comments

Created By: Home Visitor
Last Updated: 1/14/2019

[Save](#) [Cancel](#)

Family Enrollment - Status History

?

| Status | Enroll Date | Exit Date | Start Date | End Date | Comments | |
|--------|-------------|-----------|------------|----------|-------------------------|--|
| Active | 01/14/2019 | | 01/14/2019 | | Enroll Date: 01/14/2019 | |

Family Site/Fund Code History

| Code | Start Date | Notes | |
|--------|------------|-------|--|
| MIECHV | 01/14/2019 | | |

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

The screenshot shows the 'Family Data' form in a web application. The navigation bar at the top includes 'Setup', 'Families', 'Guardians', 'Children', 'Home Visitor', 'Calendar', 'Reports', and 'Support'. The left sidebar has a menu with 'Log Out', 'New Family', 'Send Email', 'Non-Actives', 'Family Home' (highlighted), 'Demographics', 'Contacts', 'Guardians & Children' (highlighted), and 'Household'. The main content area has a search bar with 'Carrey (Carrey, Mariah)' and a search icon. Below the search bar is a green notification box that says 'Your information was successfully updated.' The form fields are: 'Family Name' (Carrey), 'Family ID' (991069), 'Guardian ID' (991069), 'Guardian First Names' (Mariah), and 'Last Name' (Carrey). At the bottom, there is a question 'Is this person the primary guardian?' with 'Yes' selected and a question mark icon.

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"**.

The screenshot shows the 'Family Home' page in a web application. The navigation bar at the top includes 'Setup', 'Families', 'Guardians', 'Children', 'Home Visitor', 'Calendar', 'Reports', and 'Support'. The left sidebar has a menu with 'Log Out', 'New Family', 'Send Email', 'Non-Actives', 'Family Home' (highlighted), 'Demographics', 'Contacts', 'Guardians & Children', 'Household', 'Resource Connection', 'Goals/Plans', 'Assessments', 'Health Info', and a 'Delete Family' button at the bottom. The main content area has a search bar with 'Carrey (Carrey, Mariah)' and a search icon. Below the search bar is a blue header for 'Family Home'. Underneath, there is a section for 'Family Home' with details: 'Primary Guardian: Mariah Carrey', 'Current Status: Active', 'Enroll Date: 01/14/2019', 'Current SiteFund Code: MIECHV', and 'Visit Frequency/Case Level: BI-Weekly / weight = 2.00'. Below this is a section for 'Guardians & Children' with a table of 'Guardians Entered' and a '+ Add Guardian' button. The table has columns for 'Name', 'Phone Number', 'ST', and 'Set as Primary?'. The row for Mariah Carrey shows '214-555-1234', 'P', and 'Yes'. At the bottom, there is a section for 'Children Entered' with '+ Add Prenatal Child' and '+ Add Child' buttons.

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.

↑ ↓ Carrey, Mariah ▼

Enter New Guardian 🔍

| | | | | |
|----------------------------|--|--|--|--|
| Primary Guardian | Mariah Carrey | Family ID | 991069 | |
| Guardian ID | <input type="text" value="0"/> | | | |
| Guardian First Name | <input type="text" value="Jim"/> | Last Name | <input type="text" value="Carrey"/> | |
| | Is this person the primary guardian? | No | <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="?"/> | |
| | copy primary guardian's address | | | |
| Mailing Address | <input type="text" value="1234 Hollywood Blvd"/> | | | |
| Street Address | copy mailing | <input type="text" value="1234 Hollywood Blvd"/> | | |
| City, State, Zip | <input type="text" value="San Antonio"/> | <input type="text" value="TX"/> | <input type="text" value="78006"/> | |
| County | <input style="border-bottom: 1px solid #ccc;" type="text" value="Bexar County"/> | | | |
| Mileage | <input type="text" value="Mileage"/> | <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="?"/> | Travel Time | <input type="text" value="Travel Time"/> |
| Phone Numbers | <input type="text" value="303-555-1234"/> | <input type="text" value="Phone 2"/> | <input type="text" value="Phone 3"/> | |
| Email 1 | <input type="text" value="test@gmail.com"/> | verify e-mail | <input type="checkbox"/> Newsltr by Email? | |
| Email 2 | <input type="text" value="Email Address"/> | verify e-mail | <input type="checkbox"/> Newsltr by Email? | |

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

Email 2 [verify e-mail](#) Newsltr by Email?

| | | | |
|--|---|--|---------------|
| Community Type | <input style="border-bottom: 1px solid #ccc;" type="text" value="Urban"/> | <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="?"/> | |
| Visit Frequency/Case Level | <input style="border-bottom: 1px solid #ccc;" type="text" value="Bi-Weekly"/> | <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="?"/> | weight = 2.00 |
| Guardian consents to sharing identifiable data with the State of Washington | <input style="border-bottom: 1px solid #ccc;" type="text" value=""/> | | |
| Site/Fund Code | <input style="border-bottom: 1px solid #ccc;" type="text" value="MIECHV"/> | <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="?"/> | |

Complete the rest of the information for the guardian.

- Participation Info -
 - Select the start date for when the guardian is added to the family and begins participating
 - Choose “[use same date as family](#)” if the guardian is enrolling at the same time as the family’s Enroll Date

TANF Eligible

Referral Source Referral Date

Ethnic Category

Race

Guardian Sex DOB

Marital Status

Primary Language

Secondary Language

Speaks English Yes No

Time Available

Local ID

Medicaid #

Participation Info

Current Status

Start Date [use same date as family](#)

New Recruit?

Comments

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

Participation Info

[Set to Stop Participating](#) [?](#)

Current status: Participating

Start Date: 01/14/2019

Participation agreement date:  [?](#)


New Recruit?

Comments

Created By: Home Visitor
Last Updated: 1/14/2019

[Save](#) [Cancel](#)

| Family Enrollment - Status History | | | | | |
|------------------------------------|-------------|-----------|------------|----------|-------------------------|
| Status | Enroll Date | Exit Date | Start Date | End Date | Comments |
| Active | 01/14/2019 | | 01/14/2019 | | Enroll Date: 01/14/2019 |

| Guardian Participation - Status History | | | |
|---|------------|----------|--|
| Status | Start Date | End Date | Comments |
| Participating | 01/14/2019 | | Status: P; Start Date: 1/14/2019 12:00:00 AM  |

ADD A CHILD

Now let's add a child to the family

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

The screenshot shows the 'Guardian Data' form. The top navigation bar includes 'Setup', 'Families', 'Guardians', 'Children', 'Home Visitor', 'Calendar', 'Reports', and 'Support'. The left sidebar has 'Log Out', 'Non-Actives', and 'Family Home' (highlighted in yellow), along with a 'Delete Guardian' button. The main form area has a search bar with 'Carrey, Jim' and a search icon. Below the title 'Guardian Data' are several input fields: 'Primary Guardian' (Mariah Carrey), 'Family ID' (991069), 'Guardian ID' (991071), 'Guardian First Names' (Jim), and 'Last Name' (Carrey). There is a checkbox for 'Is this person the primary guardian?' with 'No' selected and a '?' icon. A link 'copy primary guardian's address' is also visible.

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"

The screenshot shows the 'Family Home' page. The top navigation bar is the same as in the previous screenshot. The left sidebar has 'Log Out', 'New Family', 'Send Email', 'Non-Actives', and a 'Family Home' section with sub-items: 'Demographics', 'Contacts', 'Guardians & Children', 'Household', 'Resource Connection', 'Goals/Plans', 'Assessments', and 'Health Info'. A 'Delete Family' button is at the bottom of the sidebar. The main form area has a search bar with 'Carrey (Carrey, Mariah)'. Below the title 'Family Home' are fields for 'Family Home' details: 'Primary Guardian: Mariah Carrey', 'Current Status: Active', 'Enroll Date: 01/14/2019', 'Current SiteFund Code: MIECHV', and 'Visit Frequency/Case Level: Bi-Weekly / weight = 2.00'. Below this is a 'Guardians & Children' section with a table for 'Guardians Entered' and a '+ Add Guardian' button. The table has columns for Name, Phone Number, ST, and Set as Primary? (with an edit icon). The table contains two rows: Mariah Carrey (214-555-1234, P, Yes) and Jim Carrey (303-555-1234, P, Yes). Below the table is a 'Children Entered' section with '+ Add Prenatal Child' and '+ Add Child' buttons.

| Name | Phone Number | ST | Set as Primary? |
|---------------|--------------|----|-----------------|
| Mariah Carrey | 214-555-1234 | P | Yes |
| Jim Carrey | 303-555-1234 | P | |

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.

Children

Data Entry Note: When entering a Born child the Birth Date needs to be on or before Enrollment Date.

Birth Date: 11/01/2018

Guardians: Mariah Carrey (Primary), Jim Carrey

Name: Paul, Middle Name: Carrey

Birth Weight: Lbs, Oz

Immunizations Current As of: 01/14/2019

Home Visitor: David Nevada

Current Child Care: relative/significant other

Child Primary Lang: English

Ethnic Category: Hispanic/Latino

Race: Multi race/Other

Referral Source: Friend

Caregiver relation: Mother, Legal guardian

Physician:

Sex: M

Current Education Status: N/A

Child Secondary Lang: Spanish

At Enrollment, does this child have a diagnosed developmental delay, disability, or medical condition? Y N

HIPPY Programs

- HIPPY Curriculum Year will display underneath Home Visitor

Immunizations Current As of: 01/01/1111

Home Visitor: Hippy Home Visitor

HIPPY Curriculum Year: 1

Current Child Care: center based

Current Education Status: Pre

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

Enrollment Info

Status: Active

Enroll Date: 1/14/2019 [use same date as family.](#)

MIECHV Target Child

Notes

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.

Setup Families Guardians **Children** Home Visitor Calendar Reports Support

Log Out
» Non-Actives
» Guardians & Children
» Information Record
» Contacts
» Screenings
» Assessment History
» Health Info
» Milestones

Delete Child

↑ ↓ Carrey, Paul

Child Data

Your information was successfully saved.

ID: 1289212

Name: Paul Middle Name: Carrey

Guardians: Mariah Carrey (Primary) Jim Carrey

Caregiver relation: Mother Legal guardian

Due Date: Birth Date: 11/01/2018 Age: 2 months Sex: M

Birth Weight: 0 Lbs 0 Oz Physician:

Immunizations Current As of: 01/14/2019

Home Visitor: David Nevada

Current Child Care: relative/significant other Current Education Status: N/A

Child Primary Lang: English Child Secondary Lang: Spanish

Ethnic Category: Hispanic/Latino Race: Multi race/Other

Referral Source: Friend State ID: State ID

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

Enrollment Info

[Create New Status](#) ?


Current status: Active Enroll Date: 1/14/2019

MIECHV Target Child
Family Site/Fund Code is set to: MIECHV

Notes

[Save](#) [Cancel](#)

Enrollment - Status History

| Status | Enroll Date | Exited Date | Start Date | End Date | Comments | |
|--------|-------------|-------------|------------|----------|--|---|
| Active | 01/14/2019 | | 01/14/2019 | | Status Automatically Inherited from Family. Enroll Date: 01/14/2019 |  |

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

Setup Families Guardians Children Home Visitor Calendar Reports Support

Log Out
New Family
Send Email
Non-Actives

Family Home
Demographics
Contacts
Guardians & Children
Household
Resource Connection
Goals/Plans
Assessments
Health Info

Delete Family

↑ ↓ Carrey (Carrey, Mariah) Q

Family Home

Family Home
Primary Guardian: Mariah Carrey
Current Status: Active
Current SiteFund Code: MIECHV
Visit Frequency/Case Level: Bi-Weekly / weight = 2.00
Enroll Date: 01/14/2019

Guardians & Children

| Guardians Entered | | | + Add Guardian |
|-------------------|--------------|----|-------------------|
| Name | Phone Number | ST | Set as Primary? ✎ |
| Mariah Carrey | 214-555-1234 | P | Yes |
| Jim Carrey | 303-555-1234 | P | |

| Children Entered | | | | | | + Add Prenatal Child | + Add Child |
|------------------|-----------|----------|----|--------------|-----|----------------------|-------------|
| Name | DOB | Age | ST | Home Visitor | Sex | | |
| Paul Carrey | 11/1/2018 | 2 months | A | David Nevada | M | | |