

SITE/FUND CODES ON GUARDIAN DATA PAGE

Site/Fund Codes can be found in 2 places on the Guardian Data Page

1. **After the emails** - Current code will be displayed here and can be updated - edited or new code added.
2. **At the bottom of the page** - The Site/Fund Code History is shown at the bottom of the page

Email 1

Email 2

Site/Fund Code

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

Visit Frequency/Case Level

TANF Eligible

Community Type

[edit](#) Add .5 for multiple children weight = 2.00

Enrollment - Status History			
Status	Start Date	End Date	Comments
Active	04/24/2018		Enroll Date: 4/24/2018
Exited	04/24/2018	04/24/2018	Exit Date: 4/24/2018; Exit Status: Completed Program; Exit Reason: Child entered center based program
Active	04/24/2018	04/24/2018	Enroll Date: 4/24/2018

Site/Fund Code History			
Code	Start Date	Notes	
No code	04/24/2018	Start Date assigned by Visit Tracker by default. Please update if necessary.	

UPDATE BUTTON

Click the **Update** button to either edit the current code or add a new code by clicking “Modify current code”

Email 2	<input type="text" value="Email Address"/>
Site/Fund Code	MIECHV <input type="button" value="Update"/>

Editing current code.

- Change the Start Date
- Add / Edit “Notes”

Site/Fund Code Update ✕

Modify current code

Current Code: No code

Start Date

Notes

Start Date assigned by Visit Tracker by default.
Please update if necessary.

“Modify current code”

- Click this link to add a new code

Site/Fund Code Update

Modify current code

Current Code: No code

Start Date 04/24/2018

Notes Start Date assigned by Visit Tracker by default. Please update if necessary.

Save Cancel

- Pop-up will display current code
- Fields to enter the New Code and details will open up

Site/Fund Code Update

Current Code: No code

New Code MIECHV

Start Date 05/11/2018

Notes NEW CODE ASSIGNED





Save Cancel

After updating

- Current code is updated and will be displayed

Email 2	<input type="text" value="Email Address"/>
Site/Fund Code	MIECHV <input type="button" value="Update"/>
Visit Frequency/Case Level	<input type="text" value="Bi-Weekly"/> edit <input type="checkbox"/> Add .5 for mult

- History table will show the new code added

			center based program
Active	04/24/2018	04/24/2018	Enroll Date: 4/24/2018
Site/Fund Code History			
Code	Start Date	Notes	
MIECHV	05/11/2018	NEW CODE ASSIGNED	 
No code	04/24/2018	Start Date assigned by Visit Tracker by default. Please update if necessary.	 

EDIT AND DELETING FROM THE HISTORY TABLE

Edit and delete icons will be displayed for each code in the History table


Site/Fund Code History			
Code	Start Date	Notes	
MIECHV	05/11/2018	NEW CODE ASSIGNED	 
No code	04/24/2018	Start Date assigned by Visit Tracker by default. Please update if necessary.	 

Clicking the “pencil” (edit)

- Edit the Start Date and/or Notes

Edit Site/Fund History ✕

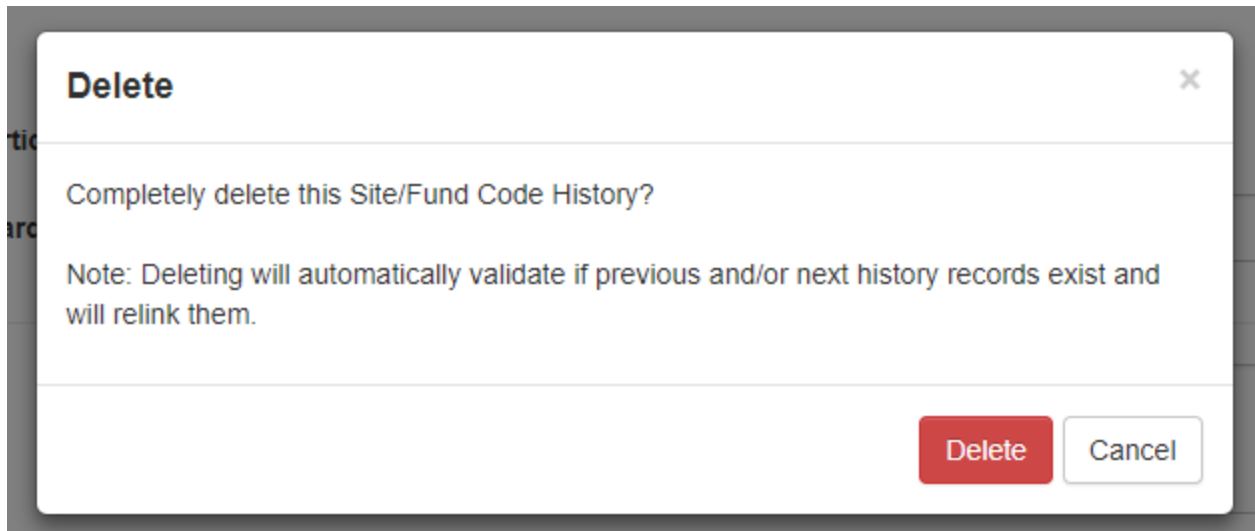
Current Code: MIECHV

Start Date 



Notes

Clicking the “trash can” (delete)

- You will receive a warning to confirm that you really want to do this.
- **There is no undo**



- Code is removed

Site/Fund Code History			
Code	Start Date	Notes	
MIECHV	05/11/2018	NEW CODE ASSIGNED	 

REPORTS

Reports have been updated that have Site/Fund Code filters

How the Site/Fund Code filter works

- Select 1 or more codes for the report date range you are running
- Data in the report will be displayed for all codes that were active during the report date range