













## TUTORIAL - STATUS HISTORY TABLE

### CONTENTS OF THE STATUS HISTORY TABLE

Status relationships and rules are at the bottom of this tutorial

#### Columns

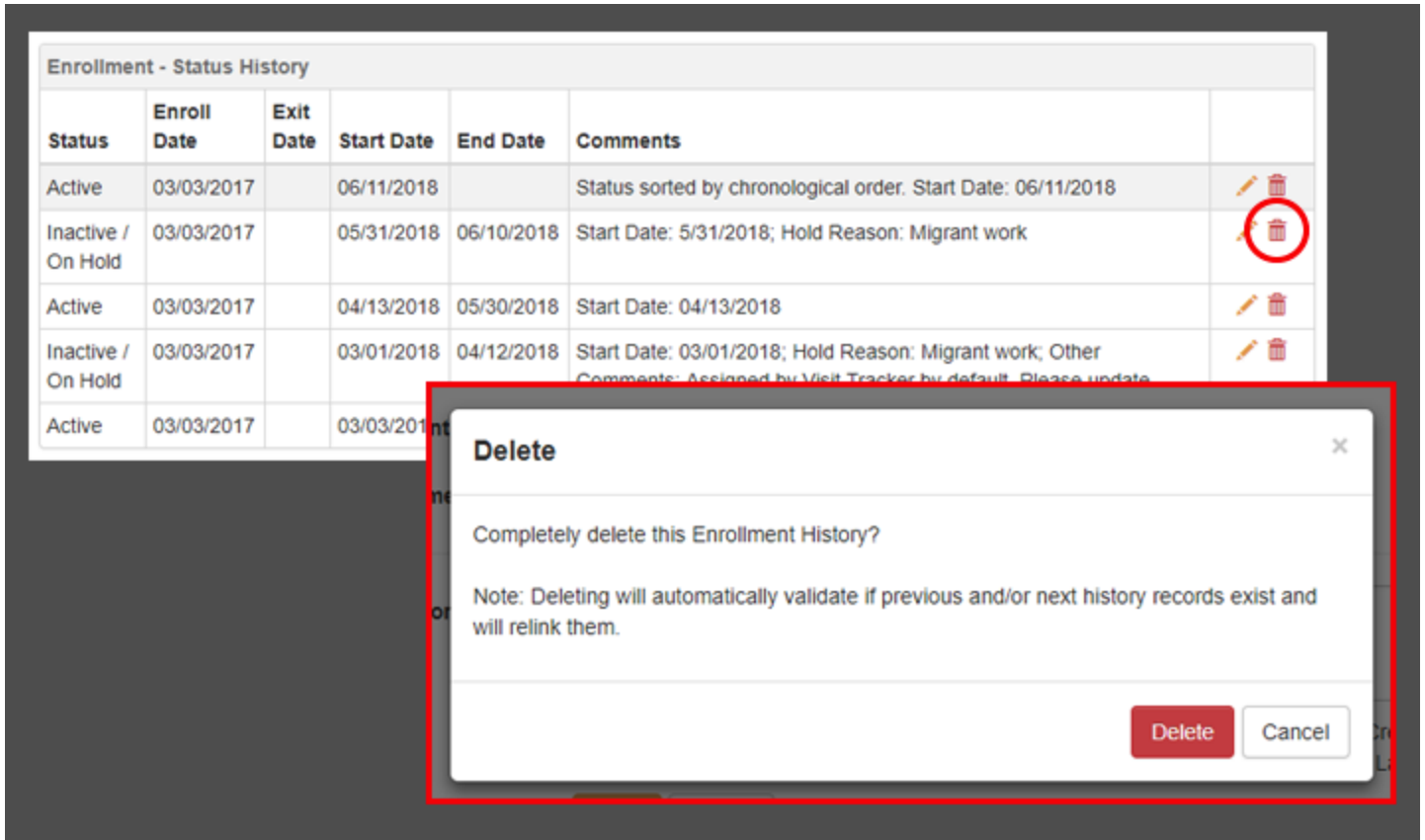
- **Status** - All Statuses entered for the individual will be shown in order by Start Date. Current Status is shown on top
- **Enroll Date** - Will display the Enroll Date associated with each Status if there if applicable.
  - **Rule:** An Enroll Date can only be created for the very first Active status and the first Active status after an Exited status.
- **Exit Date** - Once an Exited status is entered, the Exit Date will show for each Status entry until the individual is reactivated.
- **Start Date** - Each Status will be assigned a Start Date.
  - **Rule:** This date cannot be before the Start Date of the Current Status
- **End Date** - Each Status will automatically be assigned an End Date as the day before the Start Date of the next Status.
- **Comments** - This column will show Exit Reasons, On Hold Reasons, Dates and anything automated by the system like resorting of the history table.
- **Edit** and **Delete** options

Enrollment - Status History						
Status	Enroll Date	Exit Date	Start Date	End Date	Comments	
Active	06/29/2018		06/29/2018		Enroll Date: 06/29/2018	 
Mailing Only			06/29/2018	06/29/2018	Start Date: 6/29/2018	 
Exited		06/28/2018	06/28/2018	06/28/2018	Exit Date: 6/28/2018; Exit Status: Completed Program; Exit Reason: Completed services required by model	 
Active	05/01/2018		05/21/2018	06/27/2018	Start Date: 05/21/2018	 
Inactive / On Hold	05/01/2018		05/14/2018	05/20/2018	Start Date: 5/14/2018; Hold Reason: Illness	 
Active	05/01/2018		05/01/2018	05/13/2018	Status sorted by chronological order. Enroll Date: 5/1/2018	 











## DELETING AN ENTRY WITHIN THE TABLE

In this example, the history table has a participant going back and forth from Active to Inactive / On Hold. The last Inactive / On Hold will be deleted.

With all deletions, you'll receive a confirmation message.

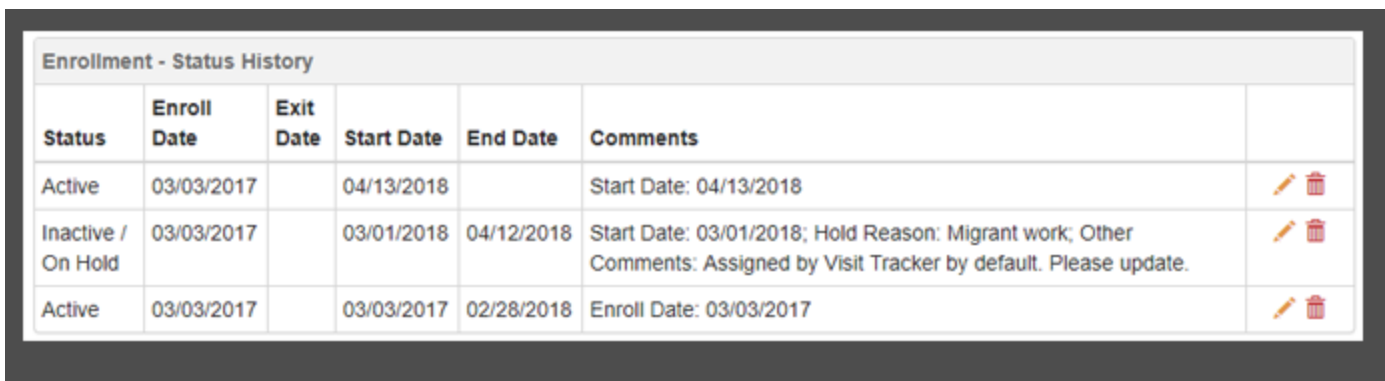


The screenshot shows a table titled "Enrollment - Status History" with the following data:







Status	Enroll Date	Exit Date	Start Date	End Date	Comments	
Active	03/03/2017		06/11/2018		Status sorted by chronological order. Start Date: 06/11/2018	 
Inactive / On Hold	03/03/2017		05/31/2018	06/10/2018	Start Date: 5/31/2018; Hold Reason: Migrant work	 
Active	03/03/2017		04/13/2018	05/30/2018	Start Date: 04/13/2018	 
Inactive / On Hold	03/03/2017		03/01/2018	04/12/2018	Start Date: 03/01/2018; Hold Reason: Migrant work; Other Comments: Assigned by Visit Tracker by default. Please update.	 
Active	03/03/2017		03/03/2018			 

A "Delete" dialog box is overlaid on the table, asking for confirmation to delete the selected enrollment history entry. The dialog includes a note: "Note: Deleting will automatically validate if previous and/or next history records exist and will relink them." The dialog has "Delete" and "Cancel" buttons.

Since the deletion results in 2 Active statuses in a row, the latest Active status (starting 6/11/18) is also removed as well. The system will choose the earlier status as the start for the Active status.



The screenshot shows the "Enrollment - Status History" table after the deletion. The table now contains the following data:









Status	Enroll Date	Exit Date	Start Date	End Date	Comments	
Active	03/03/2017		04/13/2018		Start Date: 04/13/2018	 
Inactive / On Hold	03/03/2017		03/01/2018	04/12/2018	Start Date: 03/01/2018; Hold Reason: Migrant work; Other Comments: Assigned by Visit Tracker by default. Please update.	 
Active	03/03/2017		03/03/2017	02/28/2018	Enroll Date: 03/03/2017	 

## EDITING AN ENTRY

Any of the entries can be fully edited - meaning you can either edit the information related to the Status entry or change the Status.

When clicking on the edit icon, the pop-up will show the fields and data associated with that status.

The screenshot shows a table titled "Enrollment - Status History" with the following data:

Status	Enroll Date	Exit Date	Start Date	End Date	Comments	
Active	05/31/2017		03/28/2018		Status sorted by chronological order. Start Date: 03/28/2018	 
Exited		03/23/2018	03/23/2018	03/27/2018	Exit Date: 3/23/2018; Exit Status: Completed Program; Exit Reason: Family moved out of service area	 
Inactive / On Hold	05/31/2017		03/07/2018	03/22/2018	Start Date: 3/7/2018; Hold Reason: Extended leave from area	 
Active	05/31/2017		05/31/2017	03/06/2018	Enroll Date: 05/31/2017	 

Below the table is a pop-up window titled "Enrollment - Edit Status History" with the following fields:

- Status: Exited
- Exit Date: 03/23/2018
- Exit Status: Completed Program
- Exit Reason: Family moved out of service area

Buttons: Save, Cancel

Because the previous status was Inactive / On Hold, the system will only allow Active to be chosen or remain as Exited.

The screenshot shows the "Enrollment - Edit Status History" pop-up window with the Status dropdown menu open. The dropdown menu contains the following options:









- Exited
- Active
- Exited (highlighted)
- Completed Program

Buttons: Save, Cancel

The other limitation when editing an entry is the dates. Here the previous status' start date is 3/7/2018, so no dates prior to that can be selected when editing this entry.

If you were wanting to go back further than 3/6, you would first edit, or delete, the Inactive / On Hold status starting on 3/7/2018 and then go back to the Exited status.

The screenshot displays the 'Enrollment - Status History' table and an 'Enrollment - Edit Status History' dialog box. The table lists enrollment records with columns for Status, Enroll Date, Exit Date, Start Date, End Date, and Comments. The 'Inactive / On Hold' status entry is circled in red, with its start date '03/07/2018' also circled. The edit dialog box is open, showing a calendar for March 2018. The date '03/07/2018' is circled in red, and a red line connects it to the 'Start Date' field in the table. The calendar shows that dates prior to 3/7/2018 are not selectable, as indicated by the red circle around the 7th.

Status	Enroll Date	Exit Date	Start Date	End Date	Comments	
Active	05/31/2017		03/28/2018		Status sorted by chronological order. Start Date: 03/28/2018	 
Exited		03/23/2018	03/23/2018	03/27/2018	Exit Date: 3/23/2018; Exit Status: Completed Program; Exit Reason: Family moved out of service area	 
Inactive / On Hold	05/31/2017		03/07/2018	03/22/2018	Start Date: 3/7/2018; Hold Reason: Extended leave from area	 
Active	05/31/2017		05/31/2017	03/06/2018	Enroll Date: 05/31/2017	 

**Enrollment - Edit Status History**

Status: Exited

Exit Date: 03/23/2018

Exit Status: [dropdown]

Exit Reason: [dropdown]

Save Cancel

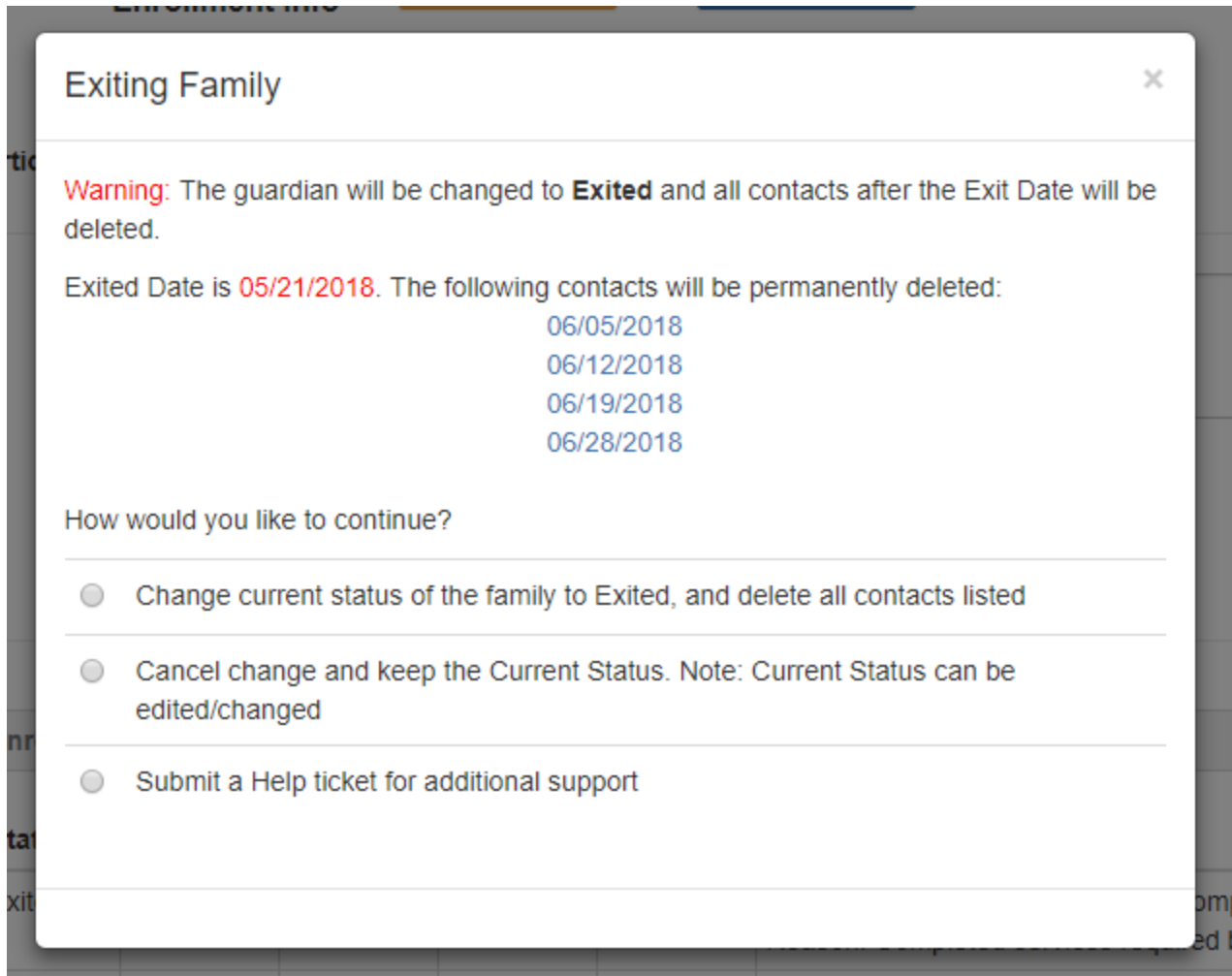
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## SPECIFIC SCENARIOS

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Any time you are editing and deleting resulting in an Exited status with an Exit Date that is before a private contact, this warning will appear.

**This warning message explains what will happen and what options you have. If in doubt, choose 'Submit a Help ticket for additional support'.**



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## STATUS RELATIONSHIPS

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Here are a few things that limit which statuses can be selected

- Status to status relationship
- Guardian and child statuses - Child statuses limited by the guardian statuses
- New guardian / new child

**Status** - these rules apply to the current status and when editing a status in the history table

- **Active** - only **Inactive / On Hold** or **Exited** can be selected
- **Inactive / On Hold** - only **Active** or **Exited** can be selected
- **Exited** can only be selected if current status is **Active** or **Inactive / On Hold**

**Guardian and child statuses**

- Guardian current status is **Exited** - all children must also be Exited
- Guardian current status is **Recruit, Wait list** or **Mailing Only** - all children not already Exited must also be **Recruit, Wait list** or **Mailing Only**
- Guardian current status is **Active** - child can be **Active** or **Waiting List**

**New guardian**

- Status selections are **Active, Recruit, Mailing only,** and **Wait list**

**New children**

- Current status of the guardian is automatically assigned to the child