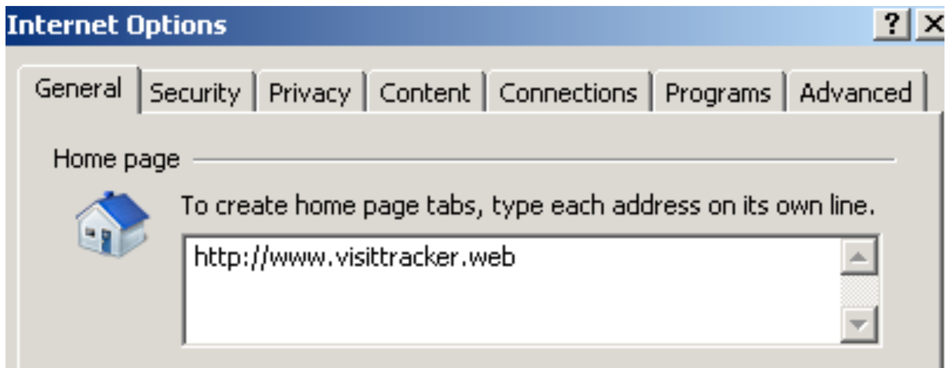
Welcome to Visit Tracker Web!

First things first! As new accounts are setup, the administrator is given this manual and it is requested that you, the administrator, give a copy to everyone in your organization who will use the software. Yes, you can access this software and your data from any Internet accessible computer or phone or iPad.

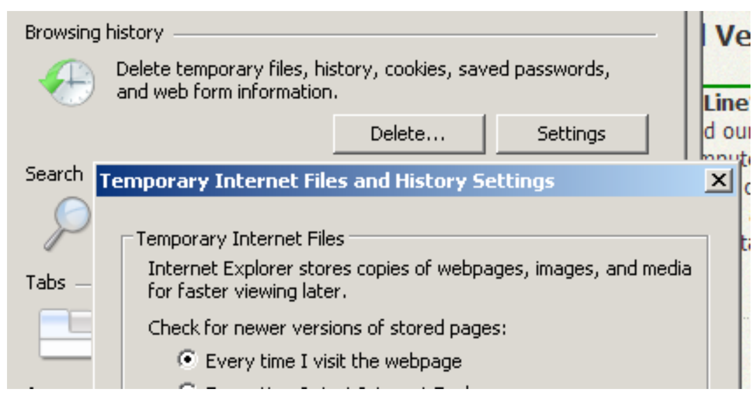
TRAINING! We have a complete set of training videos at http://data-keeper.com/training/
We are also available for custom training webinars with your organization by request. Our support phone number is 1-800-532-7148.

Below are some MANDATORY settings that you should check on all computers from which you know you will access Visit Tracker Web. We cannot make changes on your computer outside our software and your options may not look exactly like the pictures below if you have a different version of browser.
If you can't find your Internet Options, please ask your local tech person for help. (These instructions are for Internet Explorer. If you use a different browser, please search our "Help" section for "Internet Settings" or ask you local tech support.)



When you open your Internet browser (Internet Explorer), go to the Tools menu and choose "Internet Options".

1. First of all, under General, you might want to change the home page that your computer usually opens to go directly to the visit tracker web site.
2. Then go below the Home Page setting and click "Settings" for Browsing History. Make sure the "Everytime I visit the webpage" is clicked.
Click OK and OK to get out of the Options.



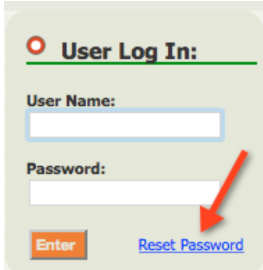
Also, under your separate Print menu in your browser, we recommend changing margins to be set to .25 left and right under Print/page setup so all items will show.

Understanding your username and password!

If you are the administrator, there are some things that ONLY you can do and therefore you have a special responsibility. You are the only one who can add users and change system settings to fit your program. You can add other users as "educators" or "helper admins".
"Home Visitors" can only see their families. "Helper admins" can see all families, but cannot add new users or change system settings. (You will also have the ability to create "Helper Admins" who are "Read Only" meaning they can see and do all but can't save any changes. This comes in handy for evaluators.)

Visit Tracker Web Manual

Login Screen from our web site



Login Procedure – Once your admin sets you up, you will receive an email with your username and link to set up your password. If you did not receive this email, look in your junk/spam folder. Also, make sure that the admin entered the correct email address. To have the email sent again, you can click on the blue "Reset Password" link on our homepage at visittrackerweb.com and enter your username. Once you have set up your password, you are ready to login.

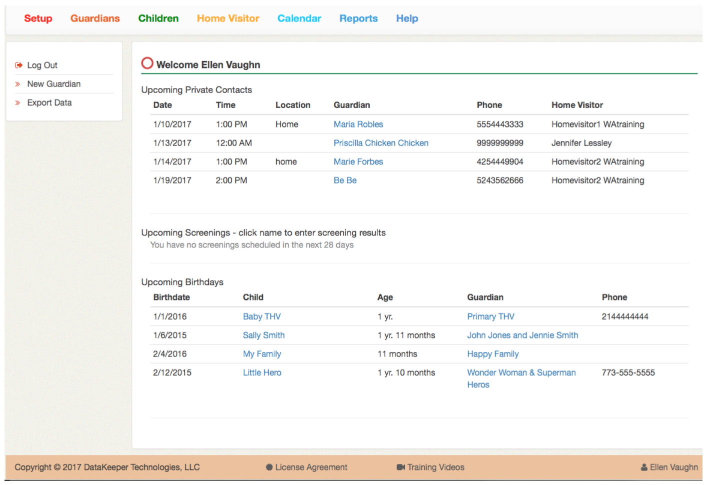
Go to visittrackerweb.com and enter your User Name and Password and click Enter.

Welcome Screen:

When you first login, you will be on the "Welcome Screen". Here, you will see upcoming visits you have scheduled, Screening you have scheduled on the Calendar and upcoming birthdays.

*User Tip - Click the blue links for short cuts to the Guardian/Child screen.

*User Tip - Click your name in the lower right corner to return to the Welcome Screen at any time



Add Families: The Main GUARDIANS screen is shown below and notice the left panel has additional screens for that guardian. Click "New Guardian" to add a family or Select the Guardian from the list. Add the required data and click on the "update Guardian Data" button at the bottom of the screen to save the data. If you do not click "Update Guardian Data", your data will not be saved!

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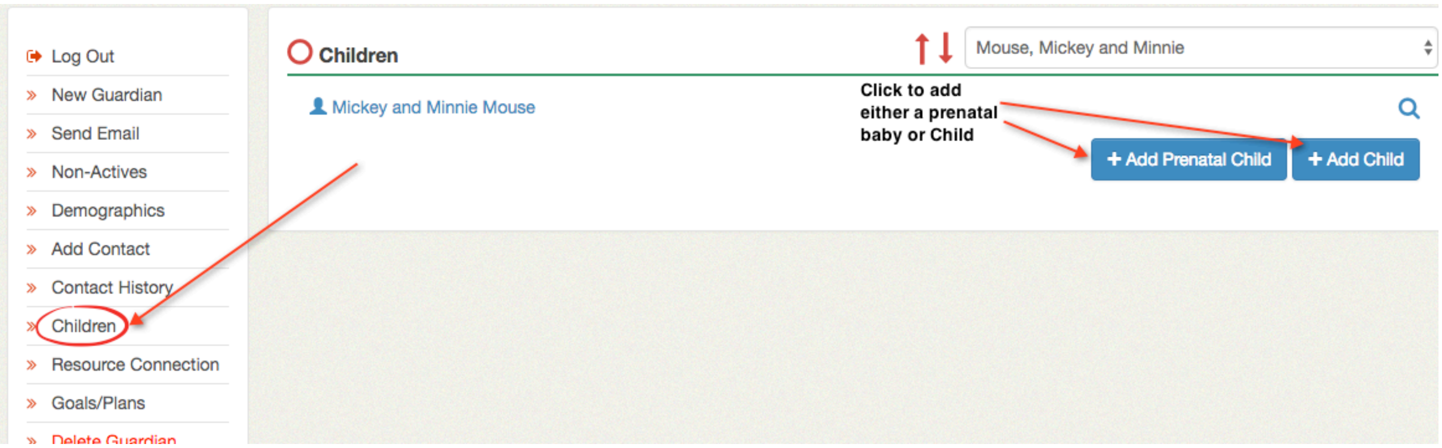
Demographic Data screen appears when "Demographics" is clicked in the left panel. The items under referral source came from the items your administrator chose under the SETUP.
If you make changes, you must click "Update Demographics". You cannot type dates, you'll need to click the calendar icon and choose the date.

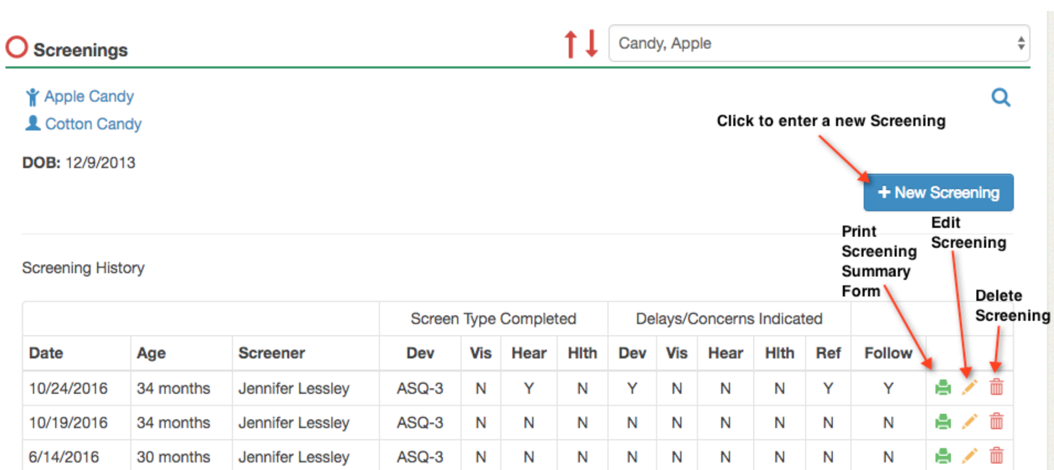
** Missouri has their own individual set of characteristics that make a family "High Needs" for their reports. For Missouri programs, please search "Demographics" in the Help tab.

** MIECHV Priority Populations – there is the ability to add the MIECHV Priority Populations tracking. This will need to be turned on in the Setup Preferences by the administrator. Please search "MIECHV" in the Help tab.

Add Children: To add children, choose the Guardian and then click “Children” from the left pane. After entering one child, the “Add Child” or “Add Prenatal Child” button appears in the top right corner to add children or siblings.



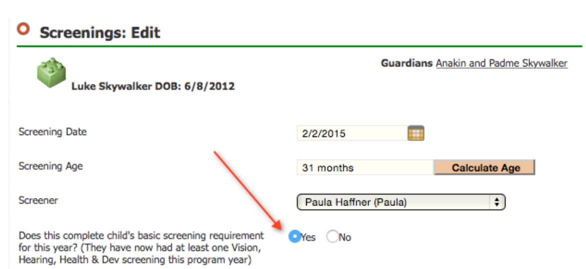
Enter Screening Data: When you have a child’s screen pulled up, you can click Screening on the left and the below screening entry page appears. This is where an educator would enter a new screening and at the bottom is where the screening history is shown. After entering a screening, notice the buttons at the end of the line. If a typed Screening Summary is desired, use that button. To change a screening, click the edit button, and to delete the screening entry, click the delete button.



			Screen Type Completed				Delays/Concerns Indicated					
Date	Age	Screener	Dev	Vis	Hear	Hlth	Dev	Vis	Hear	Hlth	Ref	Follow
10/24/2016	34 months	Jennifer Lessley	ASQ-3	N	Y	N	Y	N	N	N	Y	Y
10/19/2016	34 months	Jennifer Lessley	ASQ-3	N	N	N	N	N	N	N	N	N
6/14/2016	30 months	Jennifer Lessley	ASQ-3	N	N	N	N	N	N	N	N	N

When entering a new screening, you will see a question, "Does this complete child's basic screening requirement for this year? (Does the child now have at least one Vision, Hearing, Health & Dev screening this program year)". If you select “Yes”, then the child will be considered completely screened at least once during the year and will be counted on PAT National reports.

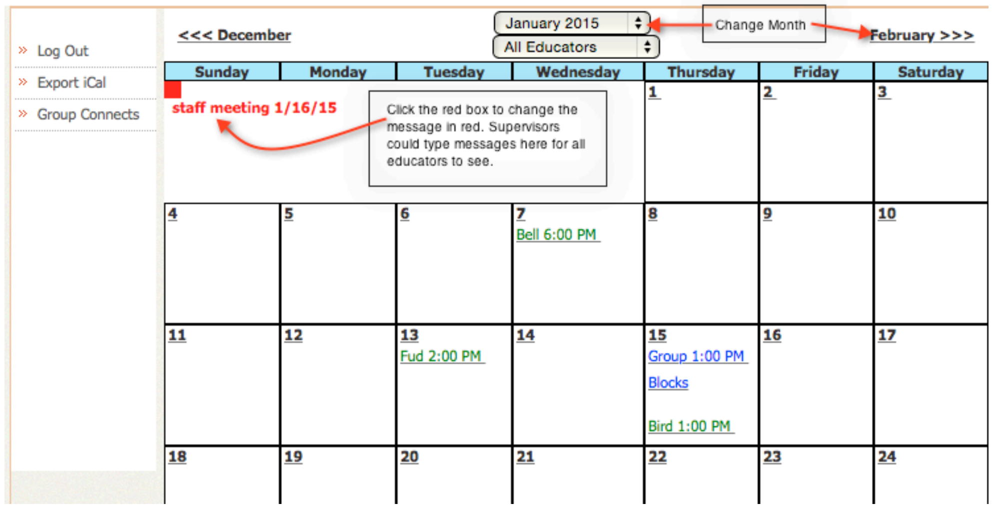
Under the Health section, you will see a question, "Immunizations up to date?". If the child's immunizations are not up to date, click "NO". During the year, if any screening is marked yes, the immunizations are up to date, the child will be considered fully immunized at the end of the year.

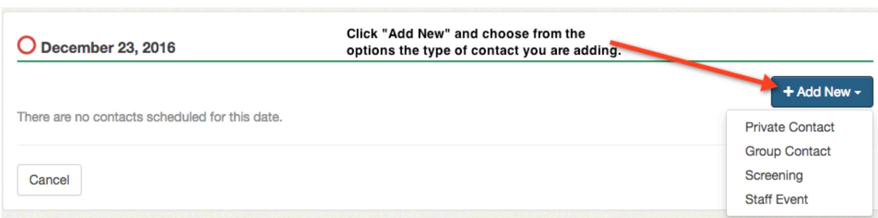


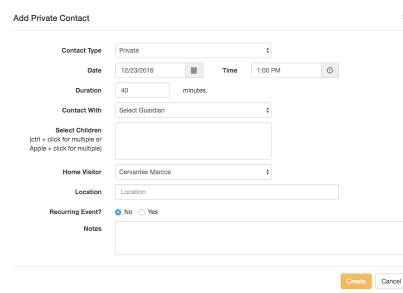
You will notice more areas to notes scores. Scores are optional in some states but PAT National reports are requesting you to note in which specific areas were concerns found.

Add/Schedule Contacts:

The CALENDAR screen appears like a calendar and the scheduled contacts show color coded. If a day is clicked, the specifics about that day's scheduled contacts are displayed and can be edited or deleted.

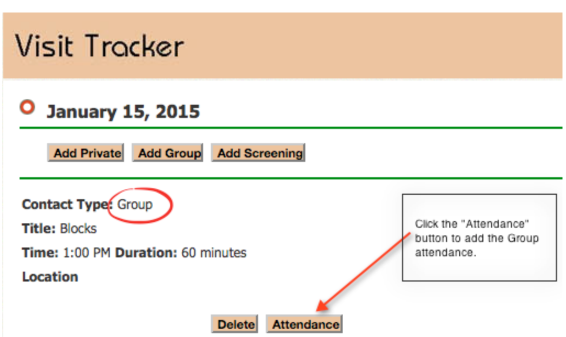




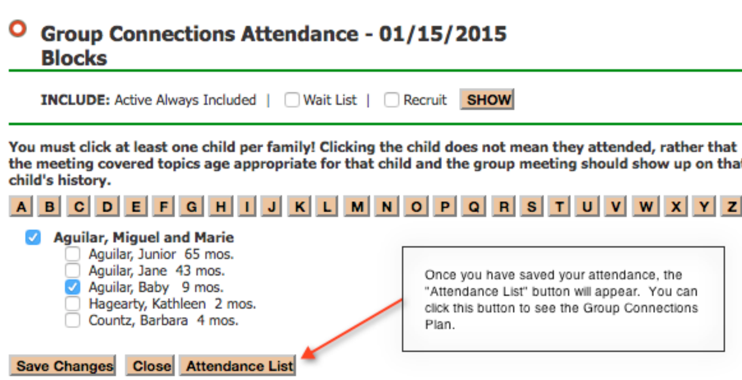


To add a new contact, educators will click the number on the calendar day and will then need to select the Contact Type. Once the contact type is chosen, dialog box will let them complete the specifics about the contact (which children, time, type of contact).

If a scheduled contact is cancelled, the educator must click on that contact from the below screen and edit it marking it cancelled. Private and Group meetings are the main visit types that appear on reports. "Play groups" are defined as group play times where no educational information is given and they are tracked but non-fundable in most states. When each educator is logged in, they will only see THEIR private contacts on the calendar but ALL public group meetings that were scheduled. (Admin account see all contacts on the calendar for all educators.)

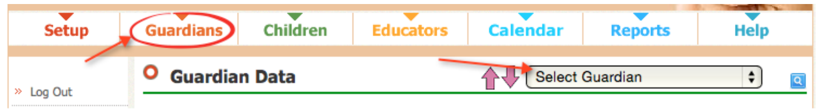


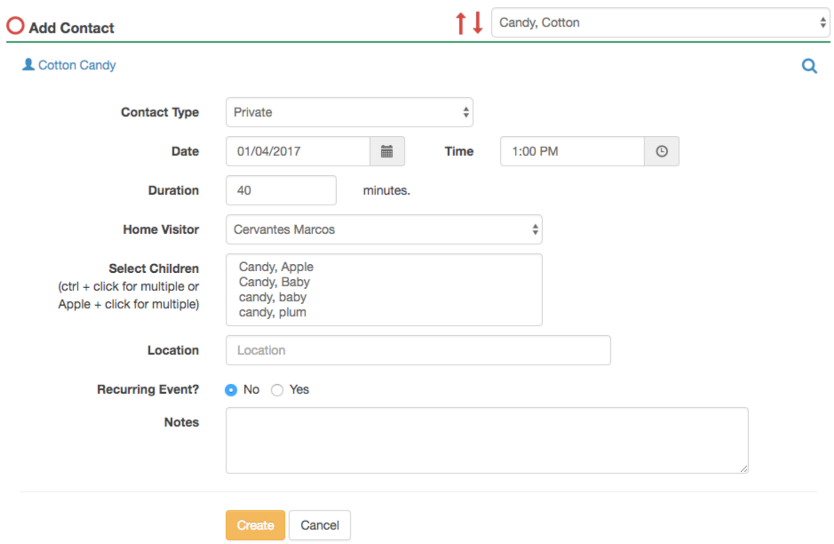
When adding **Group** contacts to the calendar, the person adding the group meeting will be able to select "public" group meeting. A public group meeting will show for all educators and therefore let all educators know that the group meeting is scheduled. If a group meeting is not marked public, it will only appear on the individual educator's calendar who added the group meeting.



When entering attendance for group meetings from the Calendar, each family and child will be displayed on a list and you can check which should receive credit. You must mark at least one child with each family. Getting "credit for a group meeting" does not necessarily mean that child attended, but that the meeting covered topics for the age group of that child. The family gets counted on the reports, but the group contact will show on the individual child's contact history also.

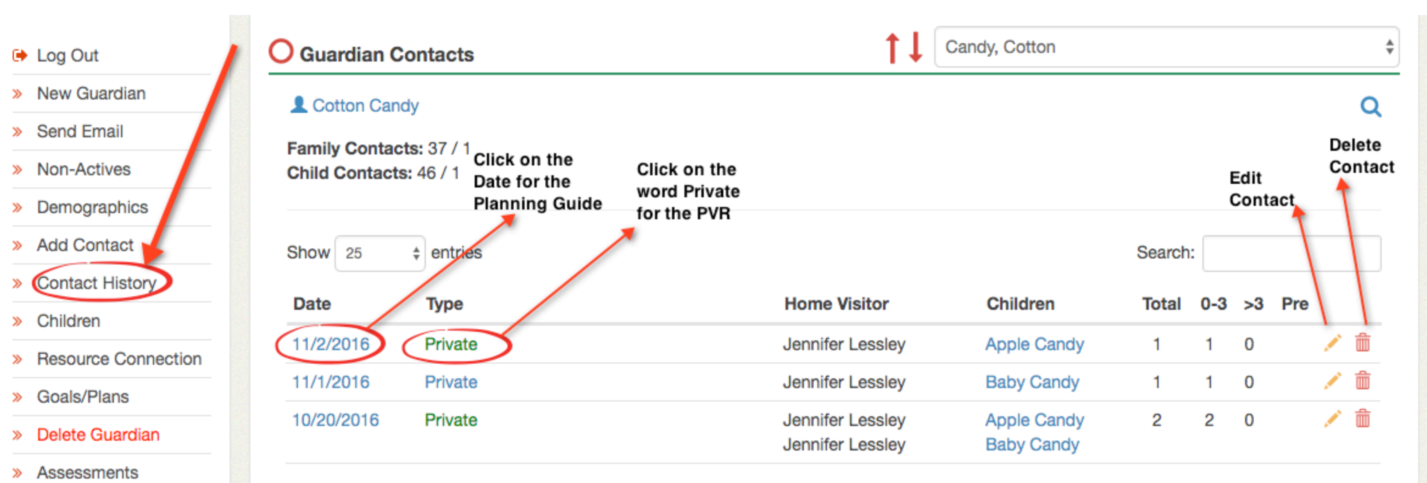
Add A Contact: Another way to add a contact is to go into Guardians and then choose the guardian from the dropdown on the right of the screen.





When the guardian record appears, choose "Add Contact" from the left of the screen.
Complete the Add Contact box (choose which children you will visit by holding down the ctrl key on your keyboard as you click on both children) and click Add Contact.

Use Visit Planner to create the Personal Visit Record for visits! After a visit has been added to the calendar or entered for a family through their contact history, an educator can then complete the Planning Guide or Personal Visit Record (PVR) by pulling up that guardian and clicking on "Contact History" in the left pane. Click on the date, and the Planning Guide will appear or click on the word "Private" for that and the PVR will appear. Complete the Planning Guide/PVR and save and print. For more information on completing the PVR, please watch the training video titled "Create a Private Visit Record".



Reports!

Reports will often be available from the Guardian, Child, or Educator prospective. If you choose “By Guardian” then the report will show totals by Guardian. For example, The Service Count report run “by guardian” will give the total Private contacts made to the home. But, the same report run “by child”, will show how many private contacts for which each particular child received credit. Therefore, if you visit a home twice, the “By Guardian” report will total 2 private visits. But if there were two children at each visit, the “By Child” report will show 4 private visits (2 for each child).

Reports usually open in a separate window. Once printed, the screen can just be closed with the X in the top corner and your Visit Tracker will still be open behind the report. Several of the reports are also shown in .pdf format. Your machine would need a copy of the free Adobe Reader to view those.
Do not “minimize” reports or PVR’s you are viewing or your timeout may be affected. Timeout means that your computer can only sit idle in one window for no more than 60 minutes. Therefore minimized reports that sit idle for 60 minutes may “kick you out”. Close a report or PVR when you are finished with it, don’t minimize it. Also, go ahead and logout (or click X to close window) when you go on a visit or you will be “kicked out”.

For explanations of each report, Click on the HELP tab and “browse the topics” to find the “Report Explanation” topic.

For custom reports, you can export the data out into Excel. Search the HELP tab for “custom reports” to find more instructions.

Find / Query / Answer questions:

A Report must be run to answer questions. You don’t have to print it, but each report will show you at the top, the number of records that match your request. Here are some examples:

How many visits by guardian were done this month?
Click the Reports Tab and choose “Service Counts”. Click to show By Guardian and enter your date range (you can enter for one week, one month, one year, etc.). If you only wanting to see the guardians that had at least one private contact in the date range, you can add that to your filters below. Then click “Get Report”. You will see the total Family Count at the bottom as well as the total number of visits.

How many new families were enrolled this month?
Click Reports Tab, choose “Family Lists”, name the report “July Enrolls”, choose at least one field (family name) and enroll data would be nice also to be shown on the list. Then choose a date range for “Families Enrolled Between” in the filter. Click Get report and a list will be shown with the total listed at the top.

If the question you want to answer starts with “how many families…” then use a family report, but if the question starts with “how many children…” then use a child report.
We are currently limited to the filters programmed. If you have a special filter request, let us know. Search the HELP for “custom reports” to see how to create custom reports.
This data can be brought into Excel and you may create your own reports/query’s.

Support/Help

Use the Help tab to see our growing online question/answer database. You may also email us a question from the Contact Us links. - This is the best way to ask a support question!

New and Updated Features

Before you login, on the home page, you will see two blogs titled “News from Support” and “New & Updated Features”. Reading these blogs are the best way to keep up to date on the newest features added to Visit Tracker. Also, when you log in, there will sometimes be a notification in red at the top of your Welcome screen. Please take a moment of your time to read these notifications!

Training

There is a complete set of training videos available on the visittrackerweb.com website.
Before logging in, look over on the left under Resources for “Training Videos”.
http://data-keeper.com/training/

This manual does not show all features, please watch the training videos and search the HELP tab for more assistance.