

Updates, Reminders and Recommendations from the MIS Team

1. **Cheers Check In** – If cases are appearing on the Performance Target reports as Invalid or Missing for the Cheers Check in, be sure to verify the correct interval on the Cheers Check In form has been entered.

CHEERS Check-In Tool

The form is within the required date window for this interval!

Date of Observation: 03/15/18

Family Support Specialist Name: --Select--

Target Child: [REDACTED]

Interval: 6 month CHEERS Check-In

2. Recently, we have received a number of questions regarding transfer cases. Below is a brief overview of the electronic transfer of a case in the MIS.

- a. Cases can be electronically transferred from one HF program to another **only if the family has been enrolled.**
- b. *For the program transferring the case OUT:*
 - i. On the discharge form, use reason code #37. This will prompt another dropdown list to appear with all the HF programs that can accept a transferred case.

4. Discharge Reason

37 Transferred/referred to another Healthy Families program ▼

List program

--Select-- ▼

- c. *For the program potentially transferring IN (accepting the transfer):*
 - i. Cases that have been transferred from another HF program can be found by clicking on Settings -> Supervision column -> Accept Transfer Cases (MIS role of Supervisor is required). Click on the case number or the Accept button to open the form.

- ii. When the form is opened, the status is auto filled with Pending. Click the arrow to open the drop-down box.

The screenshot shows a form section titled "4. Status". It contains a dropdown menu with the following options: "Pending", "--Select--", "Pending" (highlighted in blue), "Enrolled", and "Not Enrolled". Below the dropdown menu are two buttons: "Submit" (with a download icon) and "Cancel" (with a circular arrow icon).

- iii. Choose **Enrolled** if the family is to be enrolled. (It is recommended that the FSS meet with the prospective family 1-2 times before enrolling them)
- iv. If the family is not to be enrolled, choose Not Enrolled. *This will return the case to the previous site and remove the case from the Cases Eligible to be Transferred page.* The former or transferring program can see the outcome of the transfer on the discharge form.

- v. If the case was not enrolled, the Transferring Out program's Discharge Form will look like this:

4. Discharge Reason

37 Transferred/referred to another Healthy Families program ▼

List program

HF Elbonia Federation ▼

(Not Enrolled)

3. The **Identification and Contact Information** form is the last opportunity to change a case from postnatal to prenatal and vice-versa. Once the form has been submitted, the only way to make this change from prenatal (*TC DOB prior to the Intake Date*) to postnatal (*TC DOB after the Intake Date*) is to have a supervisor request the case be deleted so it can be re-entered with the accurate TC DOB.
4. Here are some guidelines for the **quickest way to resolve your MIS issue via Support Ticket**:
- Be as detailed as possible in your question. This helps to minimize back and forth communications.
 - Always include a case number
 - If you are getting an error when trying to enter a form, please attach the paper form to the ticket. This will help us to duplicate your issue and hopefully resolve the error promptly.
 - If your question is regarding a report, please include the report name and the dates for which the report was run.

5. **New User Requests** should be sent to us attached to a support ticket. Although we do have access to a fax machine, we share it with many other people who could pick up a fax without meaning to, causing us to receive the form late or not at all.
6. A few people have reported that the pictures used for the missives were hard to read, so I am trying something different with this missive. I decided to switch the orientation to landscape. Let me know your thoughts.

Please forward this missive to anyone who should be receiving it. Send us their email address so we can include them on the next one.

****FYI, opting out of this email will remove you from the listserv.****

Thank you!
Take care,
Your MIS Team