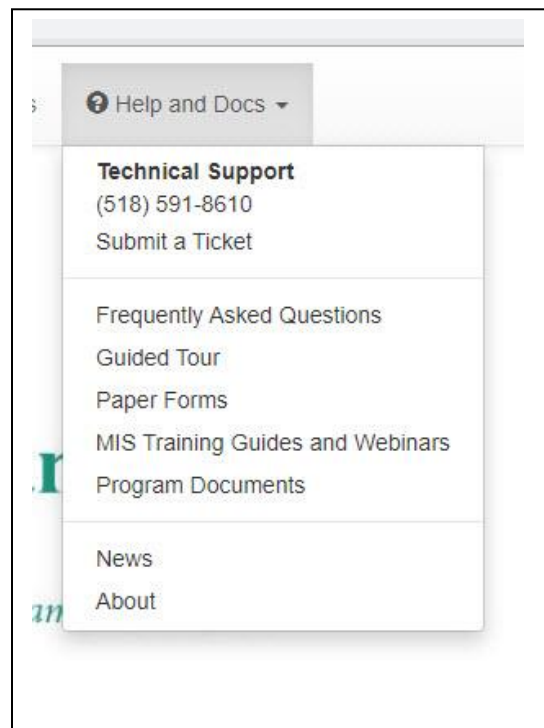# HFMISsive –

December 3, 2019

Updates, Reminders and Recommendations from the MIS Team

1. *Help and Docs* is a great resource for MIS News, Paper forms, Training materials and other valuable tools to assist all MIS Users.

2. Recently we have received many questions about coding the *Ethics Training* when entering it into the MIS *Training Form*. *This training should be added AFTER July 1, 2019, for all workers that received Ethics Training and is to be coded as*:
    a. 1.0 Goals, Services, Policies, Operating procedures, Philosophy of home visiting / family support
    b. *Do not add a subtopic*. Adding a subtopic will interfere with the reports. There has been some confusion and about this. We apologize for any miscommunication about this.
    c. Click the *Add Topic* button to insert the training to the form.
    d. Remember to add the workers who participated in the training in the *Worker's Attending* field. (Workers that have a Start Date falling after the Training date will not appear in the dropdown list.)
3. There have been a few questions about *how to transfer a worker record from one HF program to another*. (Transferring worker records will transfer the record of any trainings the staff person has completed.) Here are the steps to transfer a worker record:
    a. MIS access must be that of *Supervisor or Data Entry* to transfer worker records.
    b. The *hiring program* will transfer the worker record in the MIS.
    c. In order to transfer a worker from another program, the *worker form in the previous program must be terminated*.
    d. Click the *Transfer Worker* button that is located on the upper right side on the Worker Form page.

Worker Information Forms	→ Transfer Worker	+ New Worker

e. Click the *Program* dropdown list to access all the HF programs. *Choose the program name from which you wish to transfer the newly hired staff person.* Click Submit.

f. This will access all the *termed staff members* for the program.
g. The *worker roles and the term date* will appear next to the name of the staff person. Use the Search box to locate the worker name if there is a long list. ***If the name is not listed, chances are good the worker record was never termed. You can contact the Program manager to get the record termed. ***

h. Click the *Transfer* button to activate the worker record in the new program.

i. *Transfer* will be noted next to the staff person's name. The *Employment Date* should be entered as the date the staff person started working at the new program. The Initial Start Date will be the date the staff person began at the previous program. This is pre-filled.

j. Click the *Submit* button to finalize the activation of the worker record.

4. *Level Change Certificates* have been added to the Healthy Families New York website, on the FSS page in the password protected section of the website.

5. When submitting a *Support Ticket*, please remember to follow these guidelines:

a. *Be as detailed as possible in your question*. This helps to minimize back and forth communications.

b. Always include a *case number*

     c.   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.

     d.   If your question is regarding a report, *please include the report name and the dates* for which the report was run.

6. There is a bug on the MIS regarding *printing the Pre-Assessment and Pre-Intake.* The programmers are working on this but until then, please open the form by clicking the form date. Then, click on the printer icon in the upper right corner of the form.

7. *FSS/FRS dashboards* have been up and running for a little while. If you are having issues or have questions, please feel free to submit a Support ticket or give us a call. *Supervisor Dashboards are coming soon!*

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