

## Helpful Hints and FAQs –

- **Double check the dates** on your forms, we are now in the year **2021!**. A date entered in error could result in deleted forms and extra work.
- If a **screening tool (ASQ, ASQ-SE, PHQ2/9)** has been completed but it is not appearing as such on the HV log, check the form due date. If the due date is after the HV date, it will not appear as completed.
- The **Family Time Line** is an excellent report to review prior to visiting clients. It provides a snapshot of case due dates for all the forms and immunizations for the entire life of a case. An added benefit of reviewing this report is the adjusted ASQ due dates if a target child is premature.

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## Procedures –

- **Site Filters** are linked to workers, not cases.
- After linking a site to a worker, all cases assigned to that worker will be linked to that site.

\*\*\*When filtering reports by site, only cases assigned to workers linked to that site will appear in the report.\*\*\*

- **Creating a Site Filter**
  - Click **Sites, located in Settings**, under the Program Manager column. (only Supervisor and Data Entry Role users can create site filters)
  - Click **New Site** (upper right side of the page) and the pop-up box will appear.
  - Type in the name of the site and the Report code (they do not have to be the same). Click Submit.

The screenshot shows the 'Add New Site' pop-up form overlaid on the main application interface. The form has two input fields: 'Name:' and 'Code:', both containing the text 'Xanadu'. A blue 'Submit' button is at the bottom of the form. Two red arrows point to the 'Name' and 'Code' fields. In the background, the main interface shows a table of sites with columns for 'Site Name' and 'Report Code'. The table lists four sites: Emerald, Hogwart, Namia, and WhoVille. A red box highlights the '+ New Site' button in the top right corner of the main interface.

- **Linking a Site to a Worker to a site**

- Go to the **Worker Form, in Settings**, under the Data Entry column (only Supervisor and Data Entry Role users have access to this form).
- Select the worker name by **clicking the Edit button** to the right of the name.
- Click on the **Other Info** tab.
- Item #20. Agency/Component (aka Site) will link site and worker.
- **Click Submit Button** when site is chosen

\*\*\*Only one site can be linked to a worker\*\*\*

The screenshot shows the 'Worker Information Form' for 'Worker: Alice Gray'. The 'Other Info' tab is selected, indicated by a red arrow labeled '1'. The form contains several questions with dropdown menus: '15. Does worker have children?', '17. Does Worker Speak a Language other than English?', '19. Does worker live in target area of this program?', '20. Agency/Component (aka Site)', and '21. Date of legally permissible criminal background check'. The dropdown for question 20 is open, showing options: '--Select--', '--Select--', 'Emerald City', 'Hogwarts' (highlighted), 'Namia', and 'WhoVille'. A red arrow labeled '2' points to the 'Hogwarts' option. At the bottom, the 'Submit' button is circled in red, with a red arrow labeled '3' pointing to it.

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## Special Topics –

- **Suggested Trainings to Meet HFA Wraparound Training Standards:** An Interim Plan for New HFA Staff <https://www.healthyfamiliesamerica.org/network-resources/interim-wraparound-plan/>

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## System Updates –

- Updates are continuously made to the HF MIS. **Check the News** regularly (located under Help and Docs) to see the latest updates and fixes.
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We are available from 8-4 Monday through Friday. Please submit a support ticket (There is a direct link on the MIS, under Help and Docs) for any MIS related issues.

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.\*

**Best wishes for peaceful weekend.**

**Take care,**

**Your MIS IT Team**