

UPDATED 11/12/2018

When you are on the first screen as you enter attendance for an event, you choose who the primary contact is for the event. Use these guidelines for the family member you choose.

NewOrg Event	Primary EVENT Contact
01) Personal Encounter	Primary and include all others
02) Group Encounter	Agency is Primary and include all individuals
03) Newborn Encounter	Child and include all others
04) Prenatal Encounter	Unborn child contact and include all others
05) Personal Contact	Primary
06) Screening (Dev, Health, Vision, etc)	Child
07) Family Resource Assessment	Primary
08) Family Service Goal Plan	Primary
09) Referral	Primary and include child if specific to child
10) Adult Screening	Primary or other adult in family
11) Parent/Child Assessment	Child and primary caregiver
A) Screening for Eligibility	Child
B) Child Enrollment	Child
C) Child Transition	Child
D) Child Exit	Child
Update Contact	Primary

NewOrg Event	Form within Event
01) Personal Encounter	Personal Encounter form
02) Group Encounter	Group Encounter form
03) Newborn Encounter	Newborn Encounter form
04) Prenatal Encounter	Prenatal Encounter form
06) Screening (Dev, Health, Vision, etc)	ASQ-3, ASQ-SE, Health form
07) Family Resource Assessment	FRA- Family and Child form
11) Parent/Child Assessment	PICCOLO
A) Screening for Eligibility	Screening for Eligibility form
C) Child Transition	Child Transition form
D) Child Exit	Child Exit form

*forms are available after clicking the initial Save within the event

Family Interview and Income Verification	Stand-alone form
Access these forms directly from the forms/survey tab on the Primary Contact	Family Interview survey and Income Verification

*only forms NOT tied to an event