

## Newborn Encounter

1

From within the contact view, go to the “New Event” Dropdown menu. Choose “03) Newborn Encounter” from the list of events.

2

Click on “New Event”

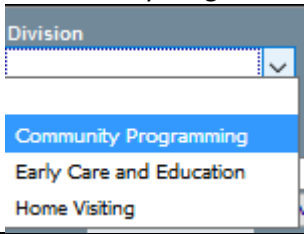
The screenshot shows the 'Contact View' for contact Jane Doe (ID: 92880). A dropdown menu titled 'New Event' is open, displaying a list of event types. The option '03) Newborn Encounter' is highlighted. The background interface includes navigation tabs (Home, Contacts, Events, Staff, Reports, Files, Dashboard) and a 'Modify' button.

The system will take you to this screen that tracks the general details for the event:

The screenshot shows the event creation form. Key fields include:
 

- Event:** (empty text field)
- Contact:** Jane Doe (92880)
- Type:** 03) Newborn Encounter
- Date:** 05/25/2017
- Start Time:** 2:00 PM
- End Time:** 2:00 PM
- Assigned To:** UserId
- Status:** Pending
- Open/Closed:** Open
- Access:** Public
- Buttons:** Save, Save & New, Save & Close, Cancel
- Options:** Copy Contacts, Copy Event

## Newborn Encounter

Field	Value
Event	A short description. Not used for reporting. Does appear on the calendar view on the Event tab.
Date	Date on which the encounter happened
Start time/End time	Start and end time of the encounter (if you want to track time)
Description	General notes
Status	Complete
Open/Closed	Closed
Division	"Community Programming" 
Program	Choose appropriate program for your agency
Program location	Choose hospital from you agency-specific list of locations

3

Click <Save>

# Newborn Encounter

4 Now, you can add more contacts

5 More staff

The screenshot shows the 'Event Edit' interface. At the top, there are tabs for 'Event Details', 'Contacts', and 'Files'. Below the tabs, there are buttons for 'Standard Summary', 'Print', and 'Outlook'. A 'Create Recurrence' button is in the top right. The main form area contains several sections: 'Event:' with an empty text field; 'Contact:' with 'Jane Doe (92880)' and an 'Edit' button; 'Type:' with a dropdown menu set to '03) Newborn Encounter'; 'Date:' with '05/25/2017' and a calendar icon; 'Start Time:' and 'End Time:' with dropdowns for hours, minutes, and AM/PM; 'Remind me:' with '0 days before this event.' and 'Minutes:' with '0' and a clock icon; 'Description:' with a large text area; 'Assigned To' with a 'Userid' dropdown and a 'More Staff' button; 'Notify me if not closed by:' with an 'Edit' link; 'Status:' with a 'Complete' dropdown; 'Open/Closed:' with a 'Closed' dropdown; 'Access:' with a 'Public' dropdown; 'Division' with a 'Community Programming' dropdown; 'Program' with an empty dropdown; 'Program Location' with a 'Baby TALK Program Location' dropdown; 'Available Forms/Surveys' with a 'Create Newborn Encounter' button; and a bottom section with 'Save', 'Save & New', 'Save & Close', and 'Cancel' buttons, along with checkboxes for 'Copy Contacts' and 'Copy Event'.

6 You will also see that you can open and create a newbornn encounter form.

## Newborn Encounter

### Add more Contacts to Event

7

Click <Edit> next to the primary contact name or click on the <Contacts> tab on the upper right of the Event screen.

The screenshot shows the 'Event Edit' interface. At the top right, there are tabs for 'Event Details', 'Contacts', and 'Files'. The 'Contacts' tab is active. Below the tabs, there is a 'Create Recurrence' button. The main form area contains fields for 'Event:', 'Contact:', 'Type:', 'Date:', 'Remind me:', 'Start Time:', and 'End Time:'. The 'Contact:' field shows 'Jane Doe (92880)' with an 'Edit' button next to it. A green arrow points from the number '7' to the 'Edit' button.

8

Use Search to pull up list of contacts and click <Add>

The screenshot shows two panels. The left panel is titled 'Search Contacts' and has an 'Advanced' search mode. It contains a search input field with 'johnny doe' and a 'Find' button. Below the search field, there is a 'Results' section showing 'Johnny Doe (3752)' with an 'Add >>' button. A green arrow points from the number '8' to the 'Add >>' button. The right panel is titled 'Primary Contact' and shows details for a contact named 'Jane Doe' with a status of 'Complete' and a duration of '60' minutes. There is a 'Delete' button next to the contact details.

On the contact view, you will maintain the status for each person. Note: The primary contact status is the same status as the Event status. Once you have added and/or updated contacts, click on <Event Details> to get back to the main screen for the event.

## Newborn Encounter

Print History Outlook Event Details **Contacts** Files Advanced

3/1/2017 9:00 AM - 01) Personal Encounter Reload

**Primary Contact**

Company	First Name	Last Name	Status	Minutes	
	Jane	Doe	Complete	60	Delete

**Additional Contacts**

Company	First Name	Last Name	Status	Minutes	
<input type="checkbox"/>	Johnny	Doe	Complete	80	Delete

Select All Cancelled by Client Change All Update

### Add more Staff to Event

9

When you click on <More staff> (see previous event details screen), you will be able to select additional staff for the event. Use <Ctrl> key to select multiple staff.

Description: +

Assigned To: Userid

Additional Staff:

- Amy Malone - admin
- Amy Malone - enduser
- April Ingram
- Cindy Bardeleben
- Deb Widenhofer

Save

Description: +

Assigned To: Userid | Status: Cancelled by Client | Minutes: | Payroll: Hourly

More Staff

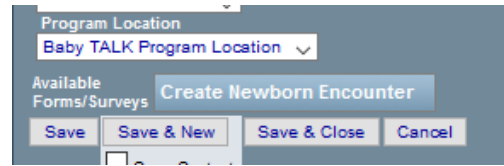
Additional Staff	Status	Minutes	
Amy Malone - enduser	Complete		<input type="checkbox"/>
Cindy Bardeleben	Complete		<input type="checkbox"/>

Delete

Notify me if not closed by: [Edit](#)

## Newborn Encounter

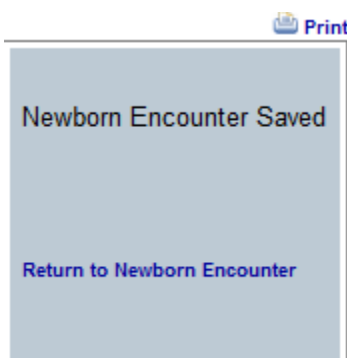
**10** Finally, select <Create Newborn Encounter form>



**11** Choose <Autosave>

Fill in the form. You may navigate across the multiple pages here

**12** <Save changes> when complete



You may return to Newborn Encounter form to edit, print the completed form, or close the tab and return to the event details and <save>