

Personal Contact

When tracking contacts with families, you will include the primary caregiver or whomever in the family made the contact. You will also include the applicable child related to the contact.

- From within the contact view, go to the “New Event” Dropdown menu. Choose “05) Personal Contact” from the list of events. Click on “New Event”

Contact View

Contact Code: JX Contact #92880 Active Save Add Flag

Contact Info: Jane Doe
 Work Phone:
 Home Phone:
 Cell Phone:
 Fax:
 Role: Mother Source: Another agency
 Email: Assigned To: UserId
 Type: Individual

Event List:
 B) Child Enrollment
 01) Personal Encounter
 02) Group Encounter
 03) Newborn Encounter
 04) Prenatal Encounter
05) Personal Contact
 06) Screening (Dev, Health, Vision, etc)
 07) Family Resource Assessment
 08) Family Service Plan
 09) Referral
 A) Screening for Eligibility
 B) Child Enrollment
 C) Child Transition
 D) Child Exit
 Update Contact

New Event

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

Event: []

Contact: Jane Doe (92880) Type: 05) Personal Contact Edit

Date: 05/25/2017 (mm/dd/yyyy) Start Time: 7:00 PM
 End Time: 7:00 PM
 Remind me: 0 days before this event. Minutes: 0

Description: []

Assigned To: UserId

Notify me if not closed in: []

Status: Pending Open/Closed: Open Access: Public

Contact Category: []
 Contact Type: []
 Division: []
 Program: []
 Program Location: []

Save Save & New Save & Close Cancel

Copy Contacts

Personal Contact

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 event is planned or the date on which happened (or was supposed to have happened)
Start time/End time	Start and end time of the contact, if applicable
Description	Notes about the communication
Status	Complete (unless you are planning a contact)
Open/Closed	Closed (unless you are planning a contact)
Contact Category	Select one: To family From family To community partner From community partner Other
Contact Type	Select one: Phone call Email Text message Drop by Parent Workshop Community Outreach/Screening
Division	"Home Visiting"
Program	Choose appropriate program for your agency
Program Location	Choose appropriate program location for your agency

2

Click <Save>

Personal Contact

3 If you would like to specify a child, specific to the actual referral (e.g. referral to EI), click <Edit> next to the primary contact name or click on the <Contacts> tab on the upper right of the Event screen.

Event Edit Standard Summary Print History Outlook **Event Details** Contacts Files Advanced

Event:

Contact: **Jane Doe (92880)** Type: 01) Personal Encounter

Date: 01/02/2017 (mm/dd/yyyy) Start Time: 1 : 00 : PM

Remind me: 0 days before this event. End Time: 1 : 00 : PM

Minutes: 0

4 Use Search to add the child and click <Add>

Note: If the primary caregiver was not present, delete this contact first, and then add applicable contacts

Search Contacts Advanced

Contact/Company/Email
johnny doe Find

Results

Johnny Doe (3752) +	<input type="button" value="Add >>"/>	<input type="checkbox"/>
---------------------	---	--------------------------

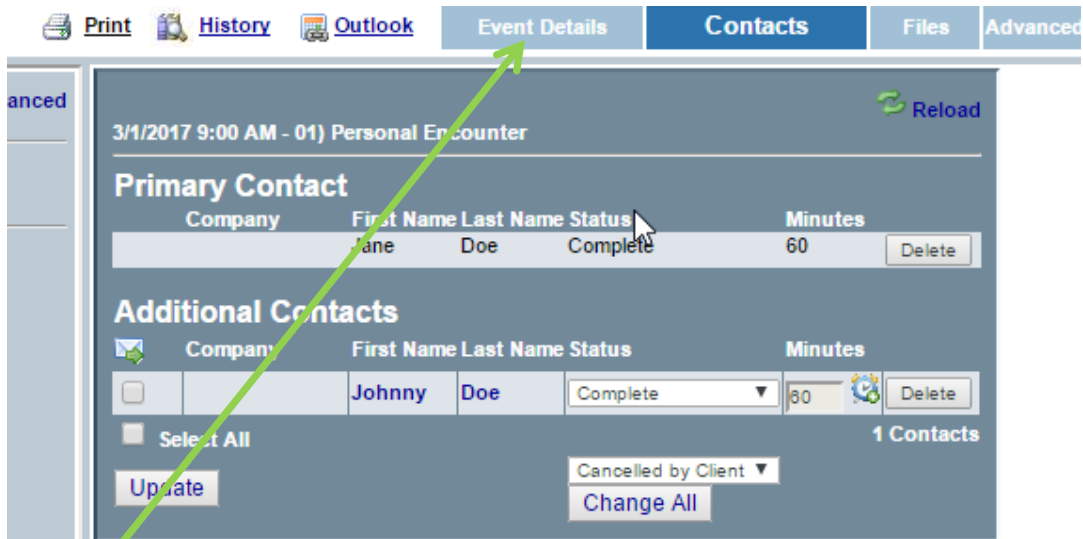
Primary Contact Reload

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

Company	First Name	Last Name	Status	Minutes
	Jane	Doe	Complete	60

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.

Personal Contact



5 Click <Event Details> to return to the event screen

6 Click <Save and Close>

