

Personal Encounter

1

From within the contact view, go to the “New Event” Dropdown menu. Choose “01) Personal Encounter” from the list of events.

2

Click on “New Event”

Contact View Print History Duplicates Face Sheet

Contact Code: JX Contact #71118 Active Save Add Flag

Contact Info: Map
 Jane Doe
 123 Main St
 Anytown, IL 11111
 US

Work Phone:
 Home Phone: 111-111-1111
 Cell Phone: 222-222-2222
 Fax:
 Source: Outreach
 Assigned To: UserId
 Type: Individual

Role: Mother
 Email: janedoe@gmail.com

Add an additional address Modify

01) Personal Encounter New Event

- 01) Personal Encounter
- 02) Group Encounter
- 03) New Born Encounter
- 04) Personal Contact
- 05) Screening (Dev. Health, Vision, etc)
- 06) Family Resource Assessment
- 07) Family Service Plan
- 08) Referral
- 09) Transition
- 10) Service Exit
- Data Point Time Stamp
- Prenatal Encounter
- Screening for Eligibility

3

Whether you are serving one child or multiple children in a home visit, you may now choose the **primary caregiver**, create new personal encounter, enter the basic information (seen in the table below) on the encounter, and <Save>:

Note: *By always using the same contact (e.g. primary caregiver) as the “primary contact” on the personal encounter event, you will have access to copy any previous forms for that contact/event type.*

New Event Create Recurrence

Event:

Contact: Type: Edit

Date: Start Time: End Time: Minutes: Remind me: days before this event.

Description:

Assigned To:

Status: Open/Closed: Access:

Division:

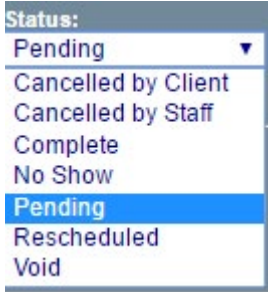
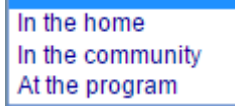
Program:

Encounter Location:

Save Save & New Save & Close Cancel

Copy Contacts
 Copy Event

Personal 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 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 home visit
Description	General case notes
Status	<p>Choose appropriate status. Void is only used to eliminate errors or duplication.</p> 
Open/Closed	<p>Open for all future events Closed for all other. Note: If an event is closed, you will be unable to make changes to the associated contacts and staff. If you need to make corrections, set the status to "open", <save>, make changes, and re-set to "closed" and <save> again</p>
Division	"Home Visiting"
Program	Choose appropriate program for your agency
Encounter location	

4 Click <Save>

Personal Encounter

5

Now, add the child(ren) and any others included in the visit within the event contacts

6

More staff, as applicable

Event Edit

Standard Summary Print Outlook

Event Details Contacts Files

Create Recurrence

Event:

Contact: Jane Doe (92880) Edit

Type: 01) Personal Encounter

Date: 11/12/2018 Start Time: 2:00 PM End Time: 2:00 PM Minutes: 0 Remind me: days before this event.

Description:

Assigned To: UserId More Staff

Status: Complete Open/Closed: Closed Access: Public

Division: Home Visiting

Program: Prevention Initiative

Encounter Location: In the home

Available Forms/Surveys

Personal Encounter Create + 2/6/2018 - (N/A Active) Copy

Save Save & New Save & Close Cancel

Copy Contacts Copy Event

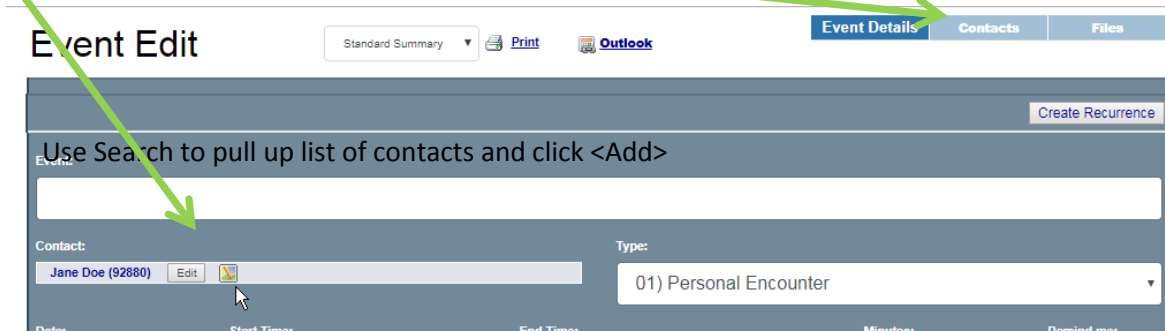
7

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

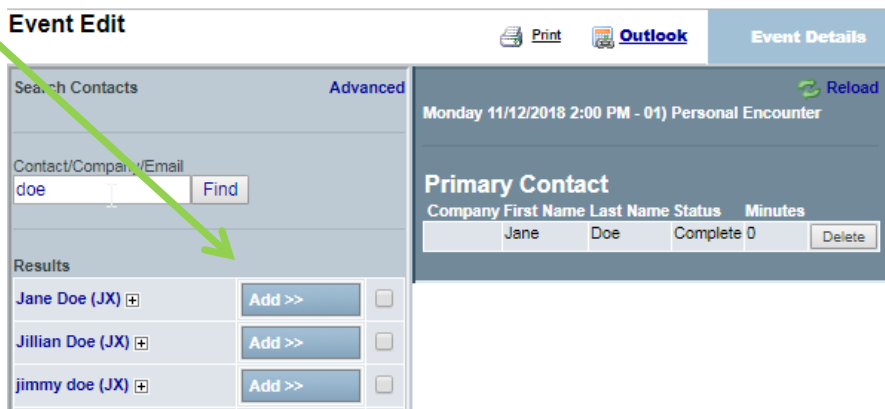
Personal Encounter

Add more Contacts to Event

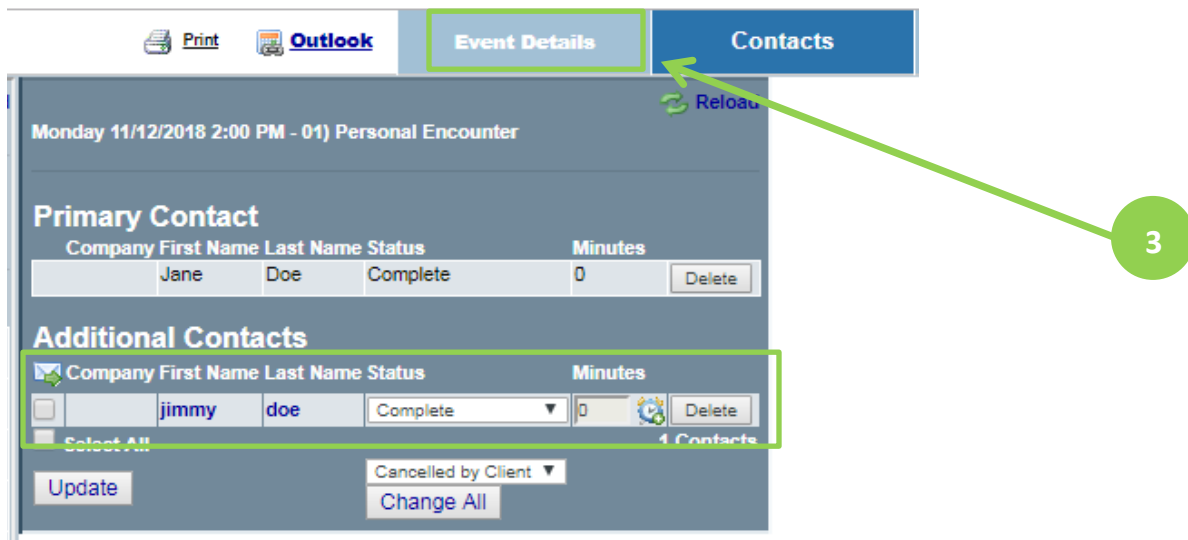
- 1 Click <Edit> next to the primary contact name or click on the <Contacts> tab on the upper right of the Event screen.



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



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 Encounter

Add more Staff to Event

- 1 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.

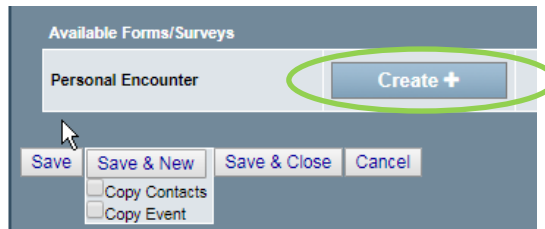
Additional Staff	Status	Minutes	Payroll
Amy Malone - enduser	Complete		Hourly
Cindy Bardeleben	Complete		

Personal Encounter

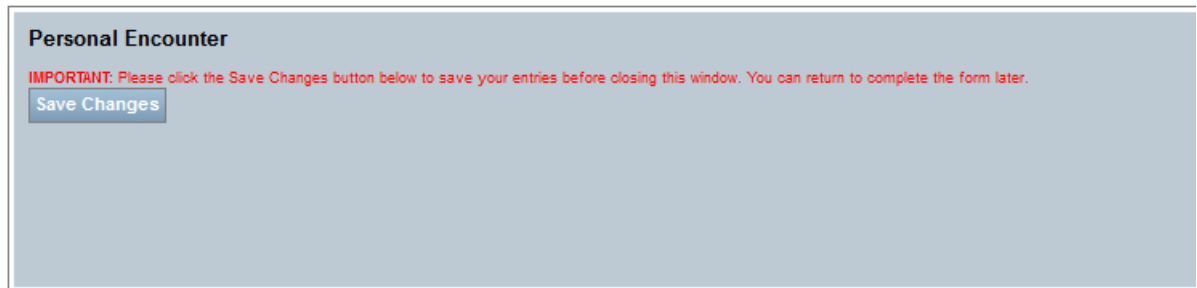
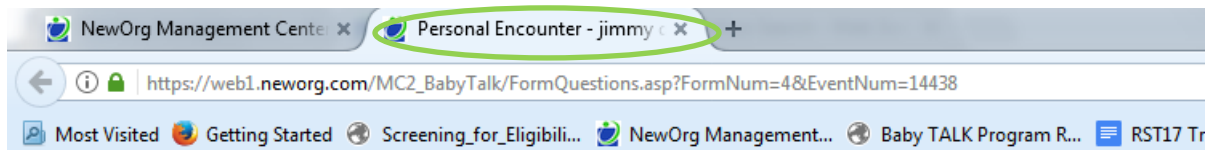
Enter Personal Encounter Form

1

Finally, select <Create>



The system creates a new tab in your browser for you to enter the form. The event you are entering remains open in your original web browser tab.



Page #1

Personal Encounter

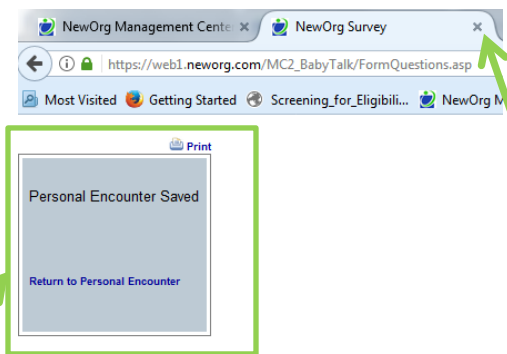
2 Choose <Autosave>

3 Select a child from the child drop down field

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

4

5 <Save changes> when complete



6 You may return to Personal Encounter form to edit or print the completed form

7 Close the forms tab, and <Save and Close> back on the Event tab

Personal Encounter

Create additional personal encounter forms (as needed for siblings)

You now have the option to “Create” or to “Copy” and choose from the drop down list of previous forms. On all future personal encounters for this primary caregiver, you will have an accumulated list of previous forms to copy.

Note: By always using the same contact (e.g. primary caregiver) as the “primary contact” on the personal encounter event, you will have access to copy any previous forms for that contact/event type.

1 Select the form you would like to “copy” from the dropdown list

2 click <Copy>

3 Now you can select the child from the child dropdown and edit/update the form as needed

4 <Save>