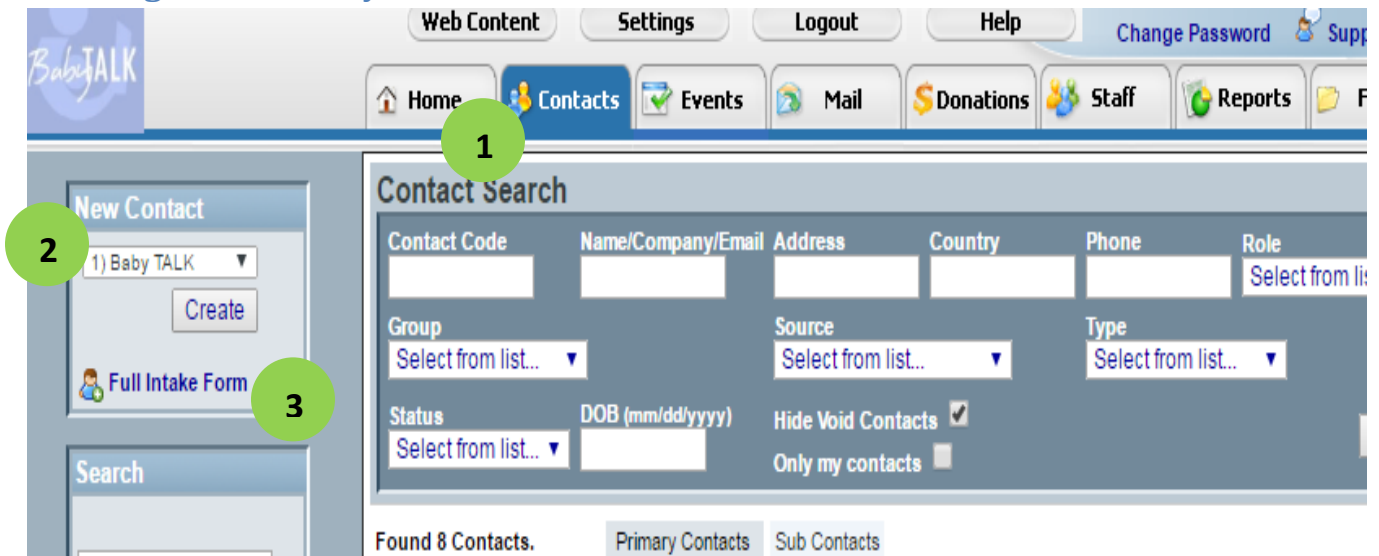


Steps Contents

- Creating Primary Caregiver (Head of Household)**..... 1
- Add Family Members 6
- Add Child-specific information for those receiving services..... 8
- Adding Full Family Interview Form** 10
- Uploading files (e.g. consents)** 11

Creating a New Family



1 Click on the **Contacts** tab

2 Choose the **Contact Type**.



3 By choosing **Full Intake Form**, you will have the full view to enter all of the primary contact’s demographics and additional data.

Creating New Family

A new window will open in your browser

1 Enter the basic information for the “Head of Household” for this family.

Assigned To	This will default to the userid of the person entering the new contact. You may change this to the individual who will provide services for the family. If the family is not assigned to a specific person at the time you are entering the contact, you may select a general userid maintained for your agency.
Status	The new primary contact will default to “Active”. In the future you may change the status based on the family’s future transition out of programming.

Creating New Family

	<div style="border: 1px solid black; padding: 5px;"> Active ▾ Active Inactive Void Pending Deceased </div>
Groups	<div style="border: 1px solid black; padding: 5px; background-color: #4F798C; color: white;"> <p style="text-align: center; margin: 0;">Groups</p> <hr style="border: 0.5px solid white; margin: 5px 0;"/> <ul style="list-style-type: none"> <input type="checkbox"/> 1) Baby TALK <input type="checkbox"/> 2) Donor <input type="checkbox"/> 3) Donor Prospect </div>
Role	<div style="border: 1px solid black; padding: 5px;"> <div style="border-bottom: 1px solid black; padding-bottom: 5px;"> Role ▾ Mother </div> <ul style="list-style-type: none"> Aunt Babysitter Caregiver Child Father Foster parent Grandfather Grandmother Legal Guardian <li style="background-color: #0070C0; color: white; padding: 2px;">Mother Nanny Other Other Relative Uncle </div>
Source	<p>Source refers to how the family is introduced to your agency.</p> <div style="border: 1px solid black; padding: 5px;"> <div style="border-bottom: 1px solid black; padding-bottom: 5px;"> Source ▾ Please select a source </div> <ul style="list-style-type: none"> <li style="background-color: #0070C0; color: white; padding: 2px;">Please select a source Another agency Friends/Family Hospital Outreach </div>
Type	<div style="border: 1px solid black; padding: 5px;"> <div style="border-bottom: 1px solid black; padding-bottom: 5px;"> Type ▾ Individual </div> <ul style="list-style-type: none"> <li style="background-color: #0070C0; color: white; padding: 2px;">Individual Business Civic Organization Couple Foundation Government Housing Unit/Lot Religious Volunteer Group </div>

2

Click <Save & Continue>



Full Contact Details

3

Contact Code:
 Assigned To:
 Status:

Member of Groups: 1) Prevention Initiative

Prefix:	First:	Middle:	Last:	Suffix:	Work Phone:
<input type="text"/>	<input type="text" value="Jane"/>	<input type="text"/>	<input type="text" value="Doe"/>	<input type="text"/>	<input type="text"/>
Role:					Home Phone:
<input type="text" value="Mother"/>					<input type="text" value="111-111-1111"/>
Title:					Cell Phone:
<input type="text"/>					<input type="text" value="222-222-2222"/>
Company:					Fax:
<input type="text"/>					<input type="text"/>
Address:					Email:
<input type="text" value="123 Main St"/>					<input type="text" value="janedoe@gmail.com"/>
City:	State/Prov:	Zip/Postal Code:			
<input type="text" value="Anytown"/>	<input type="text" value="IL"/>	<input type="text" value="11111"/>			
Country:					
<input type="text" value="US"/>					
Notes: <input type="button" value="+"/>					
<input type="text"/>					
					Allow Email:
					<input type="text" value="Approved"/>
					(Send email to confirm consent)
					Gender:
					<input type="text" value="Female"/>
					Birth Date:
					<input type="text" value="1/1/1980"/> (mm/dd/yyyy)
					Source:
					<input type="text" value="Outreach"/>
					Type:
					<input type="text" value="Individual"/>

1

Enter basic demographic information
Note: all contacts have these basic fields for tracking

2

Scroll down for more sections.
 Note: Fields named as "Child only" will not be filled in on the primary contact.

Creating New Family

Ethnicity: White/Non-Hispanic ▼	Language at home: English ▼
Highest grade of school completed: High school diploma ▼	Marital status: Married ▼
Employment status: Unemployed (not seeking employment) ▼	Date of Death: <input type="text"/> (mm/dd/yyyy)
Pregnant: No ▼	Child only: Family Structure: <input type="text"/> ▼
Child only: Homeless?: <input type="text"/> ▼	Child only: IEP?: <input type="text"/> ▼
Child only: FRL/Low Income?: <input type="text"/> ▼	Child only: Living in a Foster Home?: <input type="text"/> ▼
Child only: SNAP Eligible?: Yes ▼	Child only: Receiving Child Support?: Indicated ▼

Information 3 Expand using the “plus” signs to see and enter additional fields

Wait List

Information

Family designation of need
Indicated ▼

Intended Intensity of Services
Bi-weekly ▼

Enrolled while Pregnant
 ▼

Family range of income
 ▼

WIC Eligible
 ▼

Family Receives TANF

Family Receives Food Stamps

Family Receives WIC

F

Enrolled in EBT

County of Residence
 3

Baby TALK has permission to refer me to other opportunities for my child
 ▼

Wait List

Wait List On/Off

Wait list Date
 (mm/dd/yyyy)

Program
 ▼

Creating New Family

Enter additional fields and click Save. You have now completed creating the “Head of Household” for the family you are entering into NewOrg. You are automatically brought to the display view for this contact. From here, you will add the rest of the family members and other contacts for this family on the “More Contacts” tab.

Contact View Standard Summary Print History Face Sheet 01) Personal Encounter New Event

Contact Code: JX Contact #92880 Active Save Add Flag

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

Work Phone: 111-111-1111
 Home Phone: 222-222-2222
 Cell Phone: 333-333-3333
 Fax:
 Source: Another agency
 Assigned To: Userid
 Type: Individual

Role: Mother
 Email: j.doe@gmail.com

1 Show more addresses Modify

Groups
 Select from list... Save
 1) Baby TALK Remove

More Contacts Events Sub Contact Info Custom Fields Forms/Surveys Notes Map Files

More Contacts Show Void Attach an Existing Contact New Contact

Update Contact 3

JX:
 Assigned To: Userid Status: Active Detach Contact

Prefix First Name Middle Last Name Suffix
 Work Phone
 Home Phone
 Cell Phone
 Fax
 Email
 Allow Email Blank (Send email to confirm consent)
 Password
 Gender Male
 Birth Date 1/1/2016 (mm/dd/yyyy)

Ethnicity Multiracial/Ethnic
 Language at home English
 Last grade of school completed
 Marital status
 Employment status
 Date of Death (mm/dd/yyyy)
 Pregnant

Child only: Family Structure
 Child only: Homeless?
 Child only: IEP?
 Child only: FRL/Low Income?
 Child only: Living in a Foster Home?
 Child only: SNAP Eligible? 24
 Child only: Receiving Child Support?

Role Child
 Title
 Use Default Address
 Address
 City State Zip
 Country USA
Add new Address... Show more/less...

Notes:

4 Save Cancel

Creating New Family

3

You will see the same contact fields that you see for all contacts entered for Baby TALK family members. You will enter those that are relevant for the role you are creating. For a child, you have basic demographics and some child-specific fields to enter here. You will add more details later.

4

Click <Save>

Contact View Print History Duplicates Face Sheet 01) Personal Encounter New Event

Contact Code: JX Contact #71118 Active Save Add Flag

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

Work Phone:
 Home Phone: 111-111-1111
 Cell Phone: 222-222-2222
 Fax:

Role: Mother
Email: janedoe@gmail.com

Source: Outreach
Assigned To: UserId
Type: Individual

Add an additional address Modify

Groups
 Select from list... Save
 1) Prevention Initiative Remove

More Contacts Events Donations/Payments Sub Contact Info Custom Fields Forms/Surveys Notes Mail Files

More Contacts Show Void Attach an Existing Contact New Contact

Sort by... Sort

Name	Map	Address	Phone	Email	Assigned To	Role	Status	Created	
Johnny Doe					UserId	Child	Active	3/6/2017	Edit

5

5

Repeat the same step to add all family members and contacts for this family.

6

To add child-specific information, click on the "Sub Contact Info Tab".

Creating New Family

Contact View

Standard Summary [Print](#) [History](#) [Face Sheet](#)

01) Personal Encounter [New Event](#)

Contact Code: JX Contact #92880 Active [Save](#) [Add Flag](#)

Contact Info: [Map](#)
 Jane Doe
 123 Main St
 Anytown, IL 11111

Work Phone: 111-111-1111
 Home Phone: 222-222-2222
 Cell Phone: 333-333-3333
 Fax:

Role: Mother
 Email: j.doe@gmail.com

Source: Another agency
 Assigned To: UserId
 Type: Individual

[Add an additional address](#) [Show more address](#) **6** [Modify](#)

Groups

Select from list... [Save](#)

1) Baby TALK [Remove](#)

More Contacts [Events](#) [Sub Contact Info](#) [Custom Fields](#) [Forms/Surveys](#) [Notes](#) [Mail](#) [Files](#)

More Contacts [Show Void](#) [Attach an Existing Contact](#) [New Contact](#)

Sort by... [Sort](#)

Name	Map	Address	Phone	Email	Assigned To	Role	Status	Created	BirthDay	
Johnny Doe					UserId	Child	Active	03/01/2019		Edit

7 Click on "New Sub Contact Info" button.

Sub Contact Info [Show History/Void](#) [Child Info for PI](#) [New Sub Contact Info](#)

Child Info for PI

No records available

7

Update

Contact: Johnny Doe ▼

Type: Information ▼ Name: _____

Description: _____

Date: 09/08/2017

Status: Active ▼

Sub Contact Status: Active ▼

Lumen Number: _____ (numbers only)

SIS Number: _____ (numbers only)

EI Number (optional): _____ (numbers only)

Birth weight (lbs): _____ (numbers only)

Birth weight (ounces): _____ (numbers only)

Low birth weight? ▼

Place of birth (city): _____

Place of birth (state): _____

Parent's married at birth? ▼

Migrant? ▼

Biological Mother's date of birth: _____ (mm/dd/yyyy)

Mother's native language: ▼

Save Cancel

8 Enter the child-related tracking fields

Note: Be sure to change the "Contact" to the child's name. It defaults to the Primary Caregiver name.

Note: Be sure to select "Active" in the Sub Contact Status dropdown.

9 Click <Save>

Sub Contact Info Show History/Void Child Info for PI ▼ New Sub Contact Info

Child Info for PI

Found 1 Records. Sort by... ▼ Sort

ID	Contact	Name	Description	Type	User	Date	
	Johnny Doe			Information	UserId	3/6/2017	Edit

Creating New Family

Adding Full Family Interview Form

1

From within the contact view, go to the “Forms/Surveys” tab.

Contact View Standard Summary Print History Face Sheet 01) Personal Encounter New Event

Contact Code: JX Contact #92880 Active Save Add Flag

Contact Info: Jane Doe, 123 Main St, Anytown, IL 11111. Work Phone: 111-111-1111, Home Phone: 222-222-2222, Cell Phone: 333-333-3333. Role: Mother, Email: j.doe@gmail.com. Source: Another agency, Assigned To: Userid, Type: Individual.

Groups: 1) Baby TALK

Forms/Surveys History

Date	Form/Survey	Group	Type	Subject	Comments	Contact	Event	Modified User	Modified Date	View/Edit	Copy
11/03/2019	PICCOLO	Family	N/A			jimmy doe	11)	Johnny Doe	1/2	New/Edit	

2

Select the child from the dropdown and “Family Interview” then click “New Form/Survey”

Forms/Surveys Notes Mail Files

Johnny Doe Family Interview New Form/Survey

3

Click on “New Form/Survey”

Creating New Family

Page #1

1

You will have the full parent interview form to fill out for the family. Be sure to click <Autosave> when the form opens and <Save Changes> before you close the window in which the form opened.

****Tip-** type the child you are completing the interview for in the subject line of the form, this will help identify which child the form belongs to.


2

You may navigate across the different pages using the page number on the upper right. Once you save the Parent Interview, you will see the following:



Creating New Family

This is how the form will print, by default. You may choose to <Display in Rows> for an alternate view.



Family Interview

IMPORTANT: Please click the Save Changes button below to save your entries before closing this window. You can return to complete the form later.

Status: Active
 Contact: Johnny Doe (#X)
 Subject:
 Date: 03/01/2019
 Type: N/A

Comments

MEDICAL INFORMATION AND HEALTH HISTORY			
Question	Answer	Question	Answer
1. Does Child/Expectant Mother receive:	<input type="checkbox"/> Medicaid <input type="checkbox"/> WIC <input type="checkbox"/> Food Stamps (LINK)	2. Date of child's last physical exam:	
3. Date of child's last dental visit:		4. Name and phone number of child's physician	
5. Name and phone number of child's Hospital ER Preference		6. Name and phone number of child's dentist	
7. Name and phone number of child's specialist, if any		8. Birth weight (lbs)	
9. Birth weight (oz)		10. Is the mother currently pregnant?	<input type="checkbox"/> Yes <input type="checkbox"/> No
11. If mother is pregnant, how many weeks pregnant?		12. What was date of last prenatal exam?	
13. How many prenatal care visits completed in total?		14. Is there a need for a prenatal care home? (If so, refer as needed)	<input type="checkbox"/> Yes <input type="checkbox"/> No