Entering Participant Data

Participant Search Menu

When you click on **Participant Data Entry**, you will be taken to the **Participant Search Menu**.

Filtering

You can filter the list of records based on a search by entering data in the following parameter fields and clicking the **Search** button.

- Screen, Assessment or Intake **ID**
- Client **Name,** or any partial character string of the first or last name
- **Current FSW/FAW**
- **Case Status**

To return to the full list of clients in the data base, click **Reset.**

Case Status
The **Case Status** filter provides a number of options:
- **Assessed**- all people who have been assessed
- **Assessed Positive, Pending First HV**- all people who have been assessed with a **disposition** of "positive," but do not have any home visit records entered
- **Completed Intake**- all people who have completed an intake form, regardless of whether they have any home visits entered
- **Completed Intake, Pending First HV-** all people who have completed an intake form but do not yet have any home visits
- **Current**- all people who have been assigned a service level, but have not yet terminated
- **Engaged**- all people who have started services in accordance to the site definition of **Service Start** (usually date of first home visit)
- **Engaged & Still Active**- all people who have started services in accordance to the site definition of **Service Start** (usually date of first home visit), AND do not have a **termination** record
- **Screened**- all people who have been screened

Sorting
You can sort the list of participants by clicking on any of the header bars.
- Site
- Name
- Address
- Screen ID
- Assess ID
- Participant ID

Opening a Person's Record
If you double-click on a person listed in the **Participant Search Menu**, that will bring you to the person's **Home** form. From the **Home** form, you can navigate through all of that person's records, as well as view and add information about their partners and children. The **Home Form** is described in more detail in **Participant Navigation Bar section below**.

Adding a New Person

You can add a new person using any of the following four buttons, depending on your enrollment policy as specified in the **Site Definitions** form. You can begin data entry at any stage and can work backwards. For example, you can create a new person at Intake, and then go back and add an assessment for this person.

- **Add New Person at Screening**
- **Add New Person at Assessment**
- **Add New Person at Intake** – This button will be available only if **Enrollment Eligibility** in the **Site Definitions** form is set to "offer home visiting services universally"
- **Add New Person as Transfer** – This option allows you to enter a new intake regardless of your enrollment policy. However, this should only be used for open cases transferred from another site.

Add New Person at Screening

In order to avoid unintended duplicate screens, it is recommended that you do a search on the person's name. For example, if you wanted to enter person Susan Lee, you could search on the name string "lee". In the example below, note that PIMS will search for the string "lee" anywhere in the first or last name.

If there are no matches, then click on **Add New Person at Screening.** The example below shows part of the data entry screen for Kathleen Adam's Screening.

Screen ID:	36	Age at Screening:	36
Screen Date:	8/26/2003	Data Entry Worker ID:	
Time of Screening:	Pre-natal	Transfer Case to FAW for Assessment:	

Expectant/New Parent Information

Last Name:	Adams	First Name:	Kathleen
Street Address:	425 W. Foster Ave. Apt 2C		
City:	Chicago	State: IL	Zip Code:
Home Phone:	(555)-555-5555	Work Phone:	(555)-555-5555
Email:	Adamsfamily@gmail.com		

Enter participant name and contact information, as above.

Screener Information

Last Name:	105	First Name:	
Phone Number:		Organization:	HFC
Type of Screener:	Family Assessment Worker		
Method of Screening:	By phone		
Type of Referral:	Health clinic		

Enter Screener information. Name, phone number, and organization are optional and can be spelled out completely or coded by staff ID and other abbreviations. Choose type of screener, method of screening and type of referral from the drop-down menus.

Risk Factors   True / False / Unknown

Marital status is single, separated, divorced, or widowed:	true
Husband/partner unemployed:	false
Inadequate income:	true
Unstable housing:	false
No phone:	false
Education under 12 years:	false
Inadequate emergency contacts:	false
History of substance abuse:	false
Late or no pre-natal care, poor compliance:	true
History of abortions:	false
History of psychiatric care:	false
Abortion unsuccessfully sought or attempted:	false
Relinquishment for adoption sought or attempted:	false
Marital or family problems:	false
History of or current depression:	true

Screening Outcome   Positive

Was referral made for assessment ☑

If screen is positive, but not assessed:

Reason Declined: No time available to participate

Date Declined: 8/26/2003

Created 8/27/2003 11:00:52 AM   Updated 12/17/2003 12:27:38 PM
by   by

Save   Undo   Print

Enter the status of risk factors. PIMS will automatically calculate the Screening Outcome based on the HFA screen form rules:

- Positive if any of the following are true: Marital status single, late or no prenatal care, abortion unsuccessfully sought or attempted.
- Positive if the above are false but any other two items are true.
- Positive if there are seven or more unknowns.
- If none of the above are true, then the screening outcome is negative.

Indicate if the screen was referred for assessment. If the screen was positive but not ultimately assessed, choose the reason from the drop-down menu.

When the record is saved, the Particpant Navigation Bar appears (see below), which allows you to enter additional information at this point: assessment, intake, baseline information, and referrals. With the new person, a Home Form is created, where you can enter demographics and other information, and view current contact information and case status. For more information, see the following sections:

- "Entering Participant Data - Home Form"
- "Tracking Participant Activities – Referrals"

Screening Form

Adams, K

Home	Screening	Add Assess ->	Add Intake ->	Base/Follow	Referrals

Site ID: IL00
ID:
Current FSW

Screen ID:	36	Age at Screening: 36
Screen Date:	8/26/2003	Data Entry Worker ID:
Time of Screening:	Pre-natal	Transfer Case to FAW for Assessment:

Expectant/New Parent Information

Last Name: Adams   First Name: Kathleen
Street Address: 425 W. Foster Ave. Apt 2C

Add an Assessment

An **Assessment** record can be added from the **Participant Search Menu** with the option **Add New Person at Assessment**, or from a person's **Home Form** or **Screening Form** using the "*Add Assess*" button.

If you are adding an assessment from the **Screening Form** or **Home Form**, the participant contact information will automatically be loaded on the **Assessment Form**. Assessment ID and Assessment date are required fields.

Assessment Form

Allen,

Home	Screening	Assessment	Add Intake ->	Base/Follow	Referrals

Site ID: IL000
ID:
Current FSW:

Assessment demographics are now tracked in the Baseline/Followup form and the Home form

Assessment ID:	27	Age at Assessment: 21
Assessment Date:	7/8/2003	FAW ID: 104
Assessment Time:	Pre-natal: First trimester	Transfer to FSW ID:

General Information

Last Name:	Allen	First Name:	Shirley
Street Address:	23 Clark St.		
City:	Chicago	State: IL	Zip Code:
Home Phone:	(555)-555-5555	Work Phone:	(555)-555-5555
Email:			

Continue by adding the mother's past legal history, assessment method, and assessment scores. Scores for each section are 0, 5, 10 or -9 for unknown. PIMS will automatically total the scores. Father assessment information is entered the same way.

Mother of the Target Child Legal History

Past Juvenile probation:	No	Enter past legal history only here; enter current legal history in Baseline form
Past Juvenile detention:	No	
Past Adult conviction:	No	
Past Adult incarceration:	No	

Assessment of Mother

Assessment Method: Home in person

Family Stress Checklist scores

Childhood history:	5 (Mild)	Potential for violence:	0 (Normal)	
Troubled history:	0 (Normal)	Expectations of infant:	0 (Normal)	
CPS involvement:	0 (Normal)	Discipline of infant:	0 (Normal)	
Coping skills:	10 (Severe)	Perception of new infant:	-9 (Unknow	
Stressors/concerns:	5 (Mild)	Bonding/attachment issues:	10 (Severe)	
FSC total score:	30			

Complete the **Assessment Form** with the assessment outcome. Referrals made as part of the assessment process can also be entered. See "Tracking Participant Activities – Referrals" for more information.

Note: It is recommended that the Baseline Form be completed with the assessment. The Baseline collects additional demographic data that is analyzed in the report "Assessment: Service Acceptance Analysis".

Assessment Outcome

Disposition: Positive, offered services, participant refused ⌄

If assessment was positive, but services refused:

Reason for refusal: Participating in another program ⌄

Date of refusal: 07/10/2003

Created 8/5/2003 1:15:44 PM   Updated 8/19/2003 1:35:12 PM
by   by

Save   Undo   Print

Dispositions available	Reasons
Positive, offered services, participant accepted	n/a
Positive, offered services, participant refused	• Not interested • (Does not need services – client decision) • Not ready to commit • Misunderstood service/purpose of assessment • Moving • Participating in another program • No time available to participate • Not acceptable to other family member • Unable to locate/contact after assessment • Never completed a home visit • Other (specify)
Positive, not offered services	• (Does not need services – staff decision) • Caseloads full • Scores exceed enrollment criteria • Assigned to control group • Other • Unknown
Negative, minimal services or referrals given	n/a
Negative, no services or referrals given	n/a

Add an Intake
Add an **Intake** record from a person's **Home Page** or from a person's **Assessment Form** with the "*Add Intake*" button.

For sites that enroll participants universally, an **Intake** can be added from the **Participant Search Menu** with the option **Add New Person at Intake**.

Note that *Participant ID* and *Date (verbally) accepted services* are required fields. PIMS will use this date to automatically populate the date field in Participant Service Level Baseline below. This may or may not be the same as the service start date, which for HFA reporting purposes must be the date of the first home visit. Adjust the "Date Assigned" field as necessary, and add the participant's initial level of service and FSW ID.

Participant contact information is automatically loaded from the **Screening** or **Assessment Form**, whichever is newer, and if available.

Continue with entering the participant's medical and emergency contact information.

Medical Info

Phys Name:		First Name:	
Phys Phone:		Clinic name:	Chicago Hope Prenatal Clinic

Emergency Contact Info

Last Name:	Allen	First Name:	Ted
Street Address:	423 W. Foster Apt. 1B		
City:	Chicago	State: IL	Zip Code:
Home Phone:	(555) 555-5555	Work Phone:	
Email:			
Relationship:	Father		

Complete the form by adding additional information about the participant family.

Participant's General Information

The following section records general information which is not followed throughout the case history

Is mother married to father of target child:	No
Is mother living with father of target child:	Yes
If not living with or married to the father of target child, does mom have a current partner?	
First time parent:	Yes
High risk pregnancy:	No
Trimester of first pre-natal care:	First

Household Characteristics

of other adults living in home: **2**

Intake demographics are now tracked in the Baseline/Followup form, which can be entered at any time between screening, assessment, and intake

Relationship of other adults to PARTICIPANT (check all that apply):

- ☐ Spouse
- ☑ Current partner
- ☐ Mother
- ☐ Father
- ☐ Grandmother

- ☐ Grandfather
- ☐ Siblings
- ☑ Other relatives
- ☐ Other non-relatives
- ☐ Unknown

# of other children living in home: 1

Information about other children living in home:

	Last Name	First Name	Birth Date	Gender	Relationship	Relationship (other)	
▶	Sherman	Rose	1/15/2002	Female	Cousin		289
*							

# of children living outside home: 1

Residence of other children:

FOB's son lives with son's mother

When the **Intake Form** is saved, all available buttons will appear in the Participant Navigation Bar. For more information about the additional buttons, see the next section.

Intake Form

Allen

Home	Screening	Assessment	Intake	Base/Follow	Referrals	Parent Outcomes
History	Service	Monthly Log	Home Visits	IFSP	Medical Visits	Termination

Site ID: IL00

ID: 27

Current FSW

Participant Navigation Bar

Home Form

Home	Screening	Assessment	Intake	Base/Follow	Referrals	Outcomes
History	Service	Monthly Log	Home Visits	Family Goal Plan	Medical Visits	Termination

All participant data entry forms include a navigation bar in the header which allows you to navigate easily between the different forms.

- **Home**. This button returns you to the home form, which is also the default form which opens via the **Participant Search Menu**.
- **Screening.** This button is visible if the current person has a screening record entered. The button will appear disabled if the currently logged in user doesn't have permission to view this record.
- *Add Assess*. This button will add an assessment based on the current screening form. This option is only visible if the current person has a screening record entered but no assessment
- **Assessment**. This button is visible if the current person has an assessment record entered. The button will appear disabled if the currently logged in user doesn't have permission to view this record.
- *Add Intake*. This button will add an intake based on the current assessment form. This option is only visible if the current person has an assessment record entered but no intake.
- **Base/Follow**. This button opens the **Baseline/Followup** form. The **Baseline** data can be entered at any time, regardless of whether an intake has been completed. It is recommended that the Baseline be entered at assessment.
- **Referrals**. Referrals made for the family can be entered at any time, beginning with screening.
- **Intake**. This button is visible if the current person has an intake record entered. The button will appear disabled if the currently logged in user doesn't have permission to view this record.

The following additional activity forms will also be visible if an intake has been entered:
- **Outcomes -** Evaluation instruments administered to the participant.
- **History** – Changes to the participant's contact information or medical home
- **Service** – Changes to the participant's level of service or FSW
- **Monthly Log** - Monthly Contact Log
- **Home Visits** – Home visit records
- **Family Goal Plan** – Family Goal Plan records
- **Medical Visits** – Medical visit records for partipant, child, partner, or other family members
- **Termination** – Termination record