

FamilyNet ORCHIDS: Crystal Reports Guide



Public Health Division
Center for Prevention & Health Promotion
800 N.E. Oregon Street, Suite 370
Portland, Oregon 97232
(971) 673-0382

If you need this information in an alternate format,
please contact ORCHIDS Application Support,
(971) 673-0382 or orchids.app-support@state.or.us

Introduction

Welcome to ORCHIDS Crystal Reports! These reports have been created to supplement the reports in the FamilyNet ORCHIDS application. They offer an alternate way to organize and summarize your agency's data.

They are also a more flexible reporting tool. You can print all or some pages of the reports, or you can work with them onscreen. You can also save these reports in different file formats. The biggest difference you will notice, however, is that the Crystal Reports have no case filters. Almost all of these reports run on visit dates, not on case dates or case status. The Crystal Reports show data about clients that received services (visits) during the date range of the report.

As you work with Crystal Reports, keep in mind that your agency's reports reflect the data that staff entered into ORCHIDS. Incorrect data on these reports are often correctable by correcting the data entry. Data on these reports update early every morning, which means that the reports reflect all data entered into ORCHIDS as of the end of the previous day.

Example reports used in this document display fake data. The clients, cases, and visits are all fictitious.

ORCHIDS Application Support

(971) 673-0382

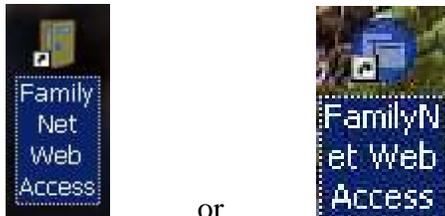
orchids.app-support@state.or.us

Table of Contents

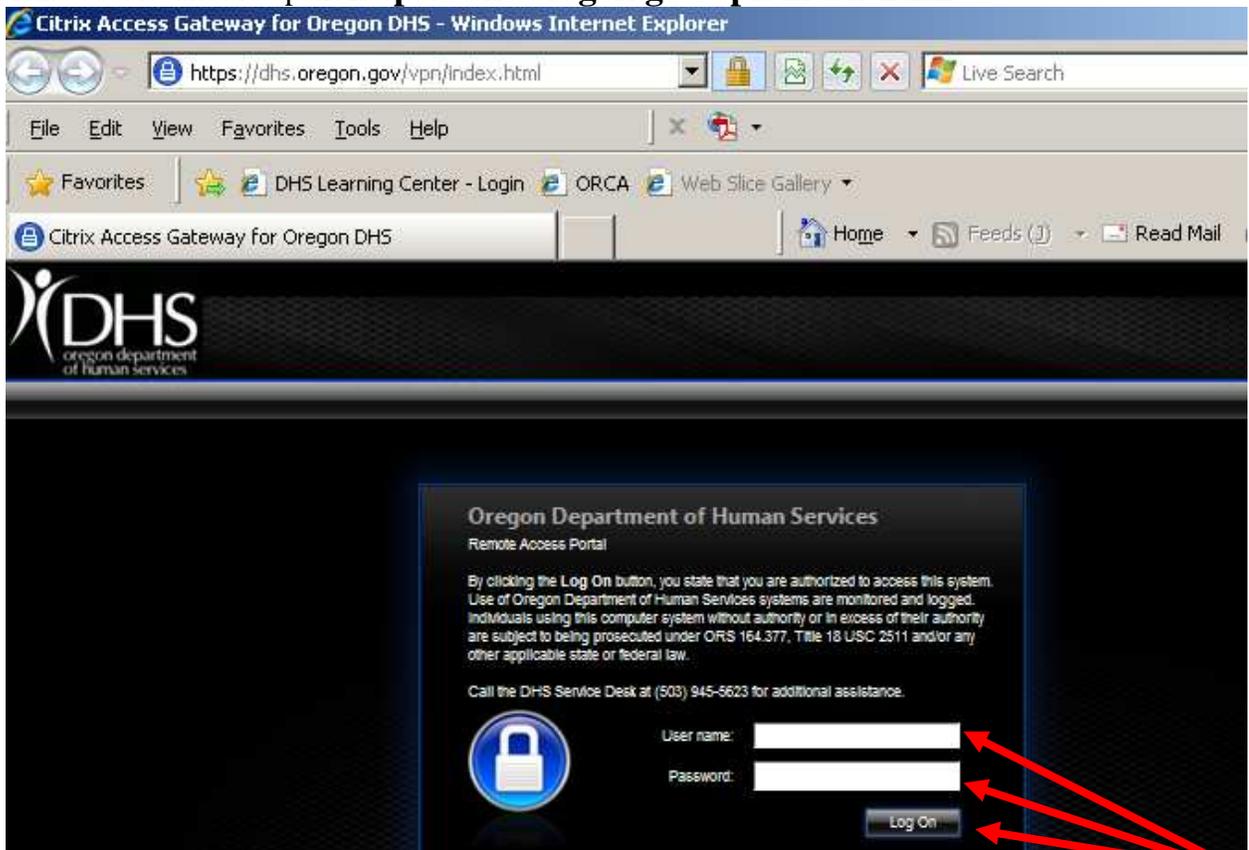
Introduction	i
Logging In	1
Setting Your Preferences	4
Running a Crystal Report	14
Printing (Exporting) a Report	21
Saving (Exporting) a Report	23
Screen Icons	29
Troubleshooting	33
Reports	
Caseload Report	35
Client Population Summary	38
County Codes Report	49
Failed Visit Report	52
Initial Risk Report	55
IOI (Issues/Outcomes/Interventions) Report.....	58
Referrals In Report	61
Referrals Out Report	64
Summary Counts (Client Counts and Visits)	67
Tickler Report	70

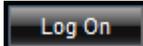
Logging in to Citrix and Business Objects

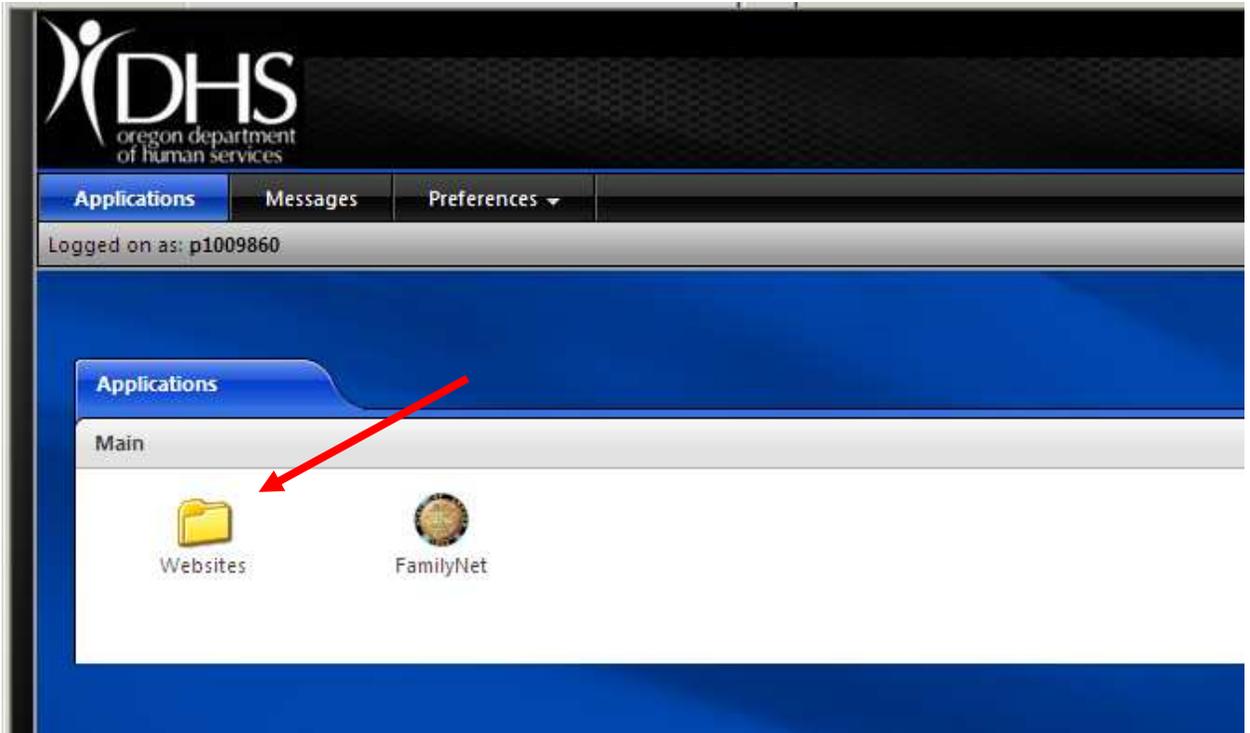
1. Double-click the Citrix icon on your desktop. On some desktops it looks like a blue circle with white papers inside of it; on other desktops it looks like a yellow door. The label on the icon may have been renamed in your office. The Citrix icon is the icon you use when you log into the FamilyNet TWIST, IRIS, or ORCHIDS modules.



2. This website should open: <https://dhs.oregon.gov/vpn/index.html>



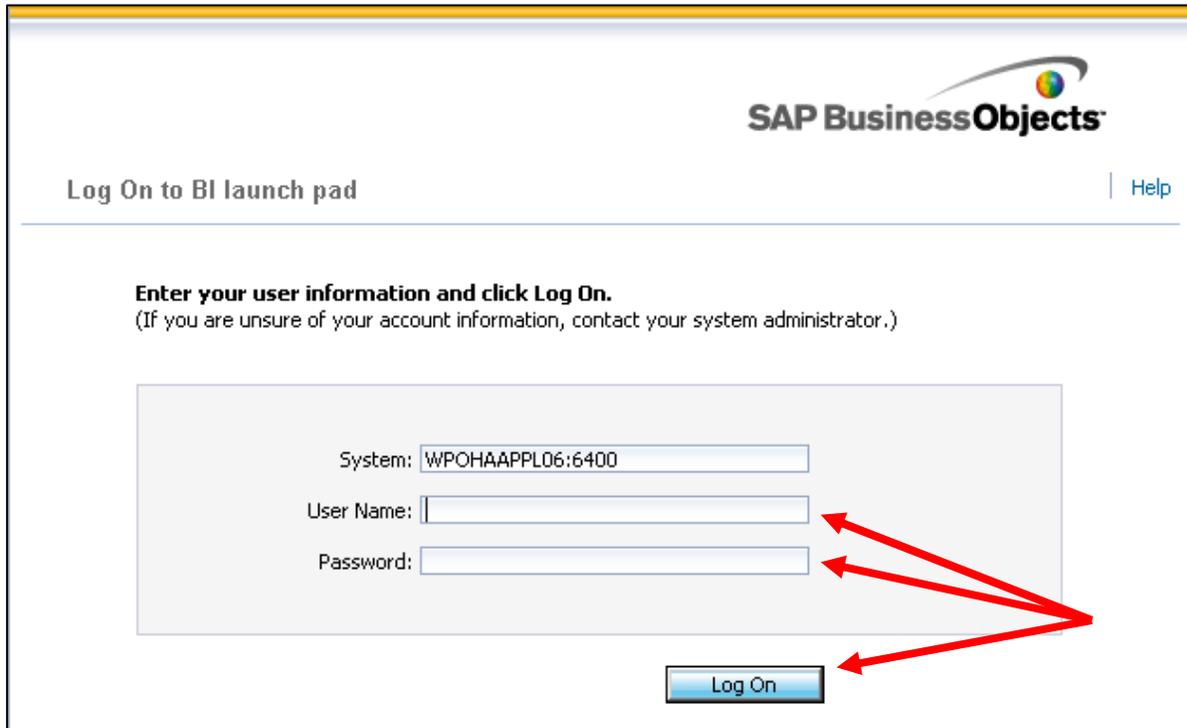
3. Type your Citrix user name, which is also called your “p-number” or “partner number.” Type your password. Click the  button.



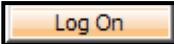
4. Click on the “Websites” folder icon.



5. Click on the “BOXI InfoView” icon.



The image shows the SAP BusinessObjects login interface. At the top right is the SAP BusinessObjects logo. Below it, the text "Log On to BI launch pad" is on the left and "Help" is on the right. The main content area contains the instruction: "Enter your user information and click Log On. (If you are unsure of your account information, contact your system administrator.)". Below this is a form with three input fields: "System:" with the value "WPOHAAPPL06:6400", "User Name:" which is empty, and "Password:" which is empty. A blue "Log On" button is positioned below the form. Three red arrows originate from the right side of the form area and point to the "User Name" field, the "Password" field, and the "Log On" button.

6. Enter the same user name (p-number) and password that you used on the earlier Citrix login screen (Step #3). Enter your user name (p-number) and password, and then click on the  button.

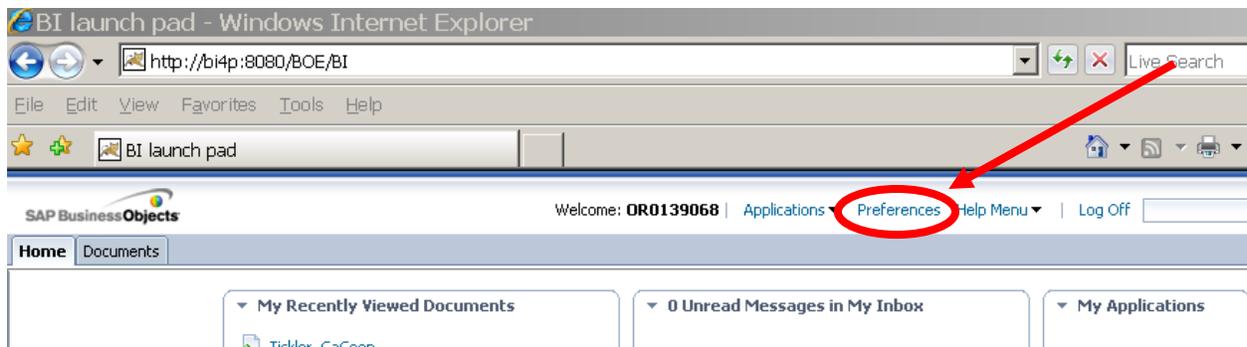
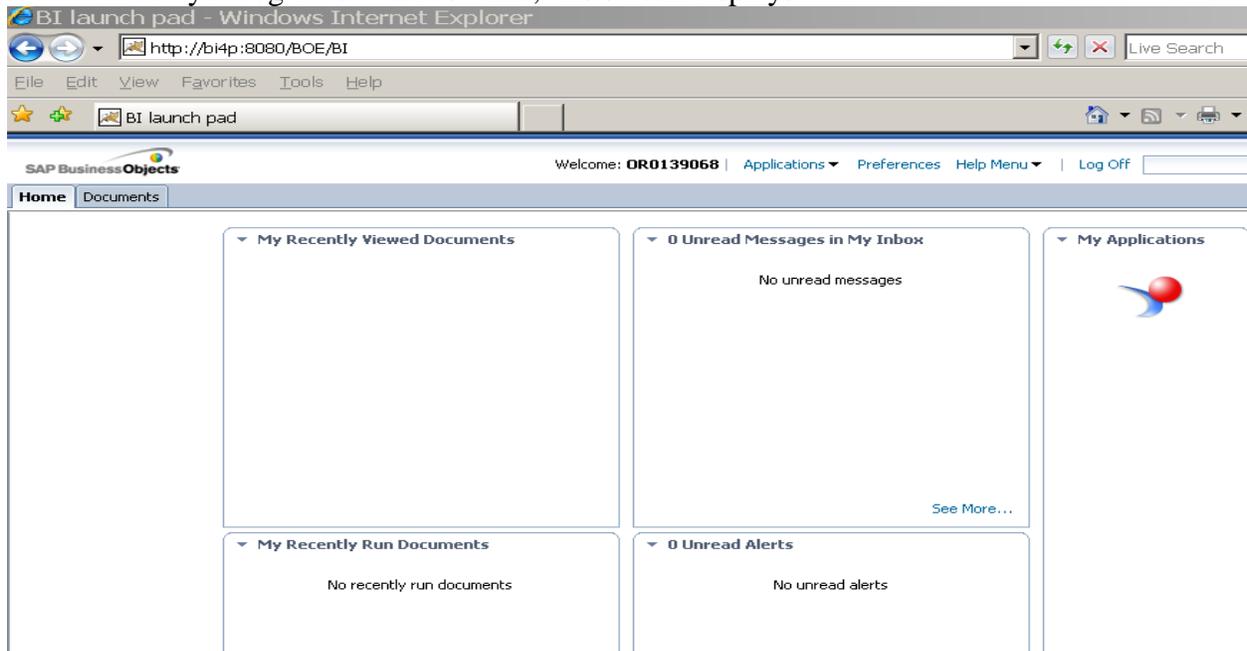
Setting Your Preferences

Before you start using Crystal Reports, there are two things you should do right away. You should set your preferences to:

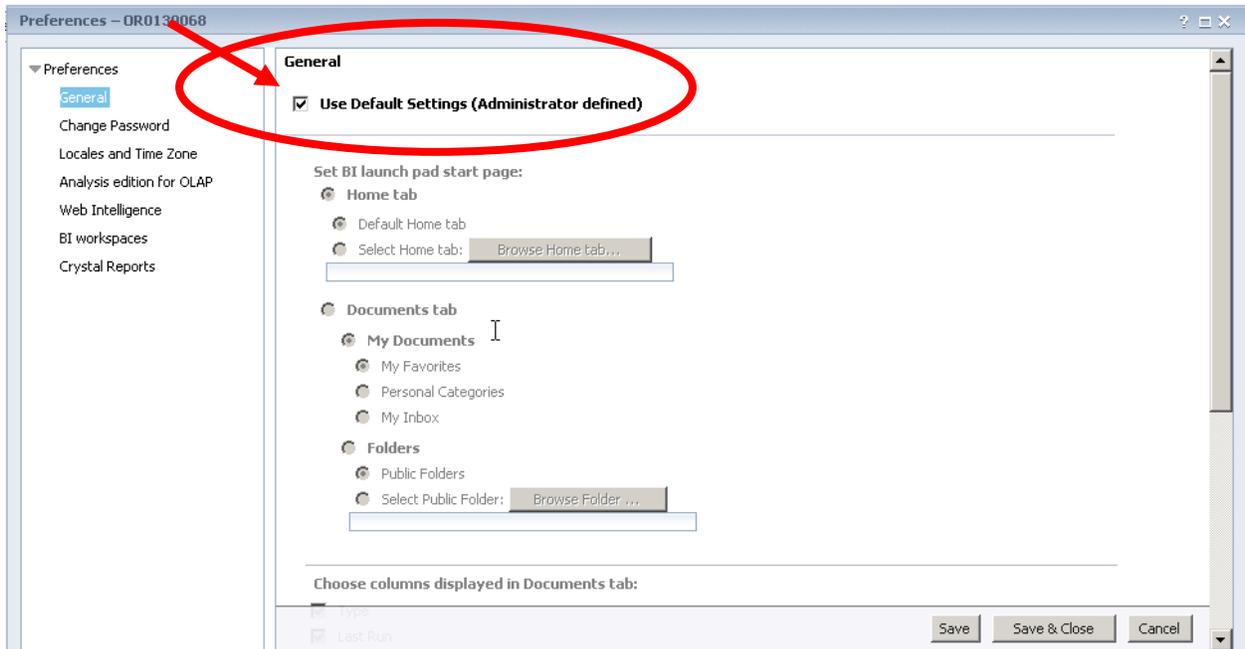
- make Crystal Reports be the first thing you see when you log in
- allow you to print.

These two tasks need to be completed once only. Completing them will simplify using Crystal Reports.

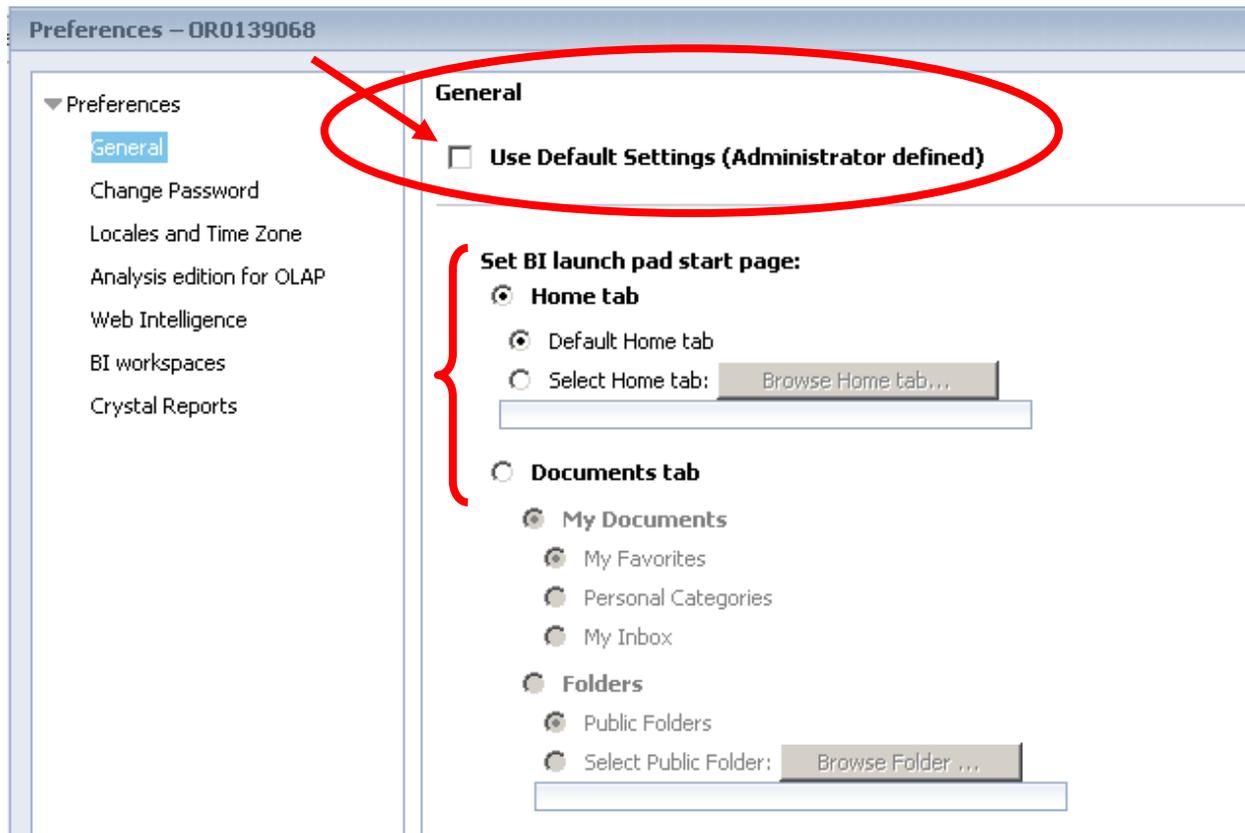
1. When you log in for the first time, this screen displays:



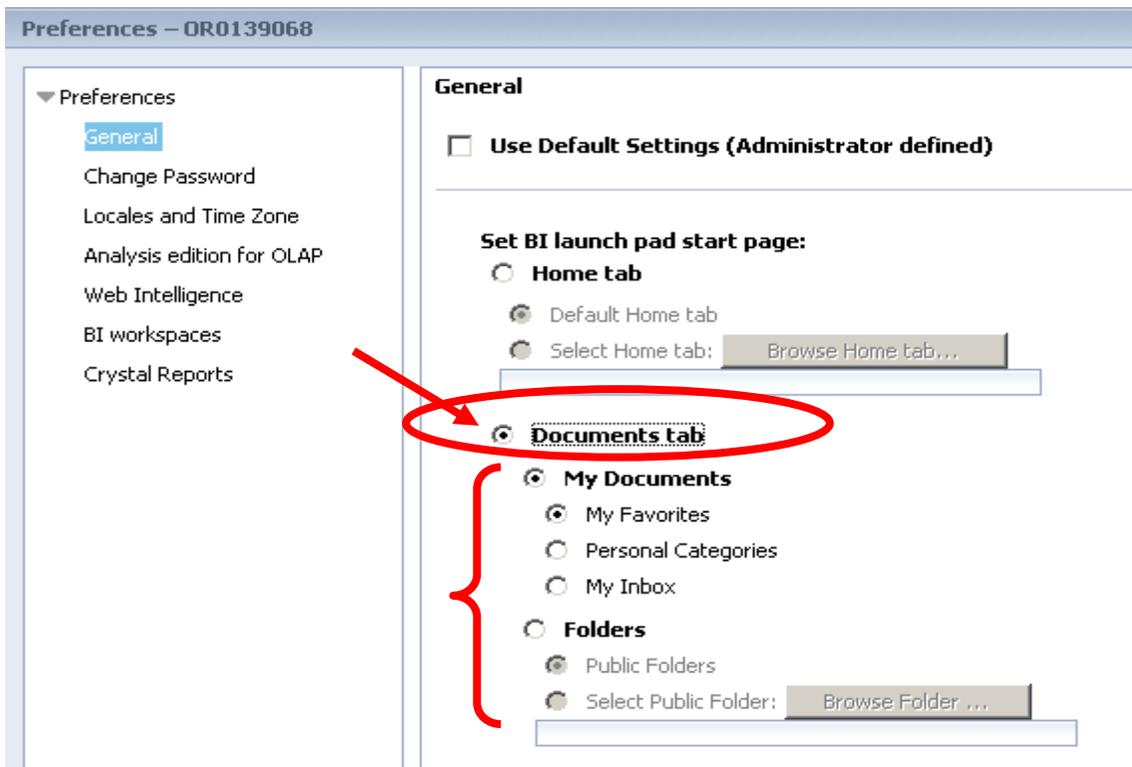
2. Click on “Preferences” near the top of your screen.



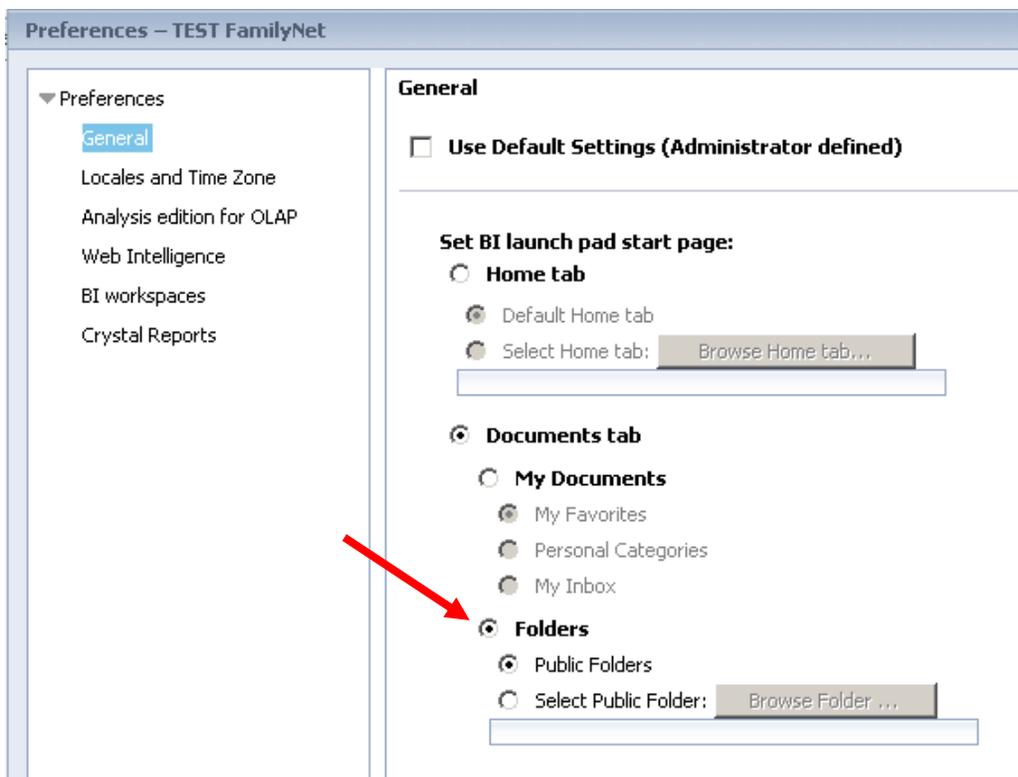
3. The “Preferences” window opens. Click on the checkmark to the left of the “Use Default Settings (Administrator defined)” option.



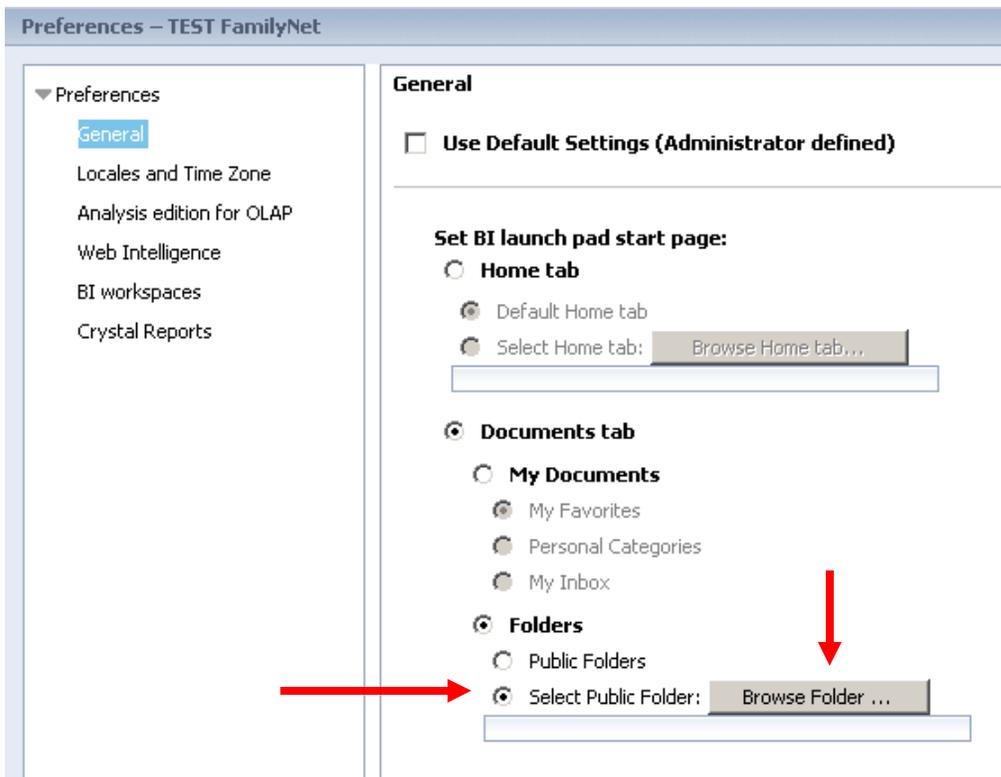
4. The checkmark disappears. The “Set BI launch pad start page” field (directly below) becomes enabled. Parts of the field become enabled and look black now instead of gray.



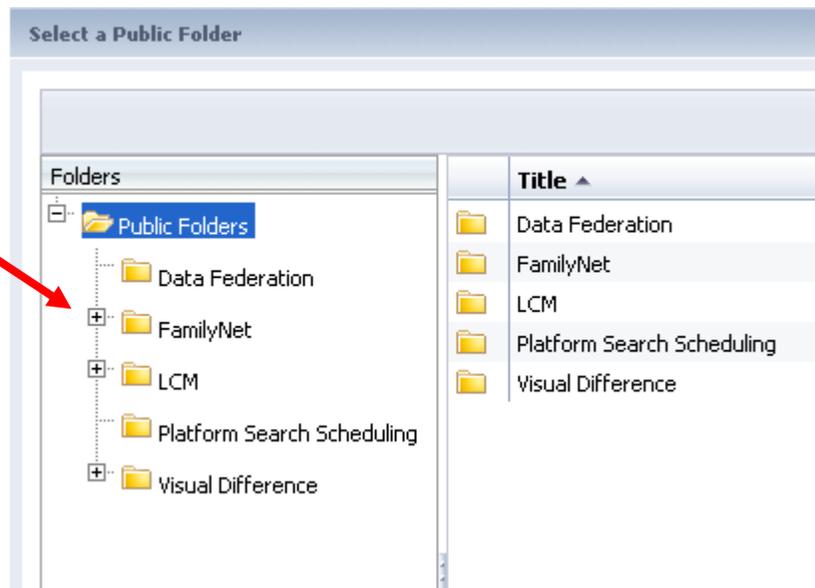
5. Click on the radio button to the left of the “Documents tab” field. Some of the fields beneath it become enabled and look black now instead of gray.



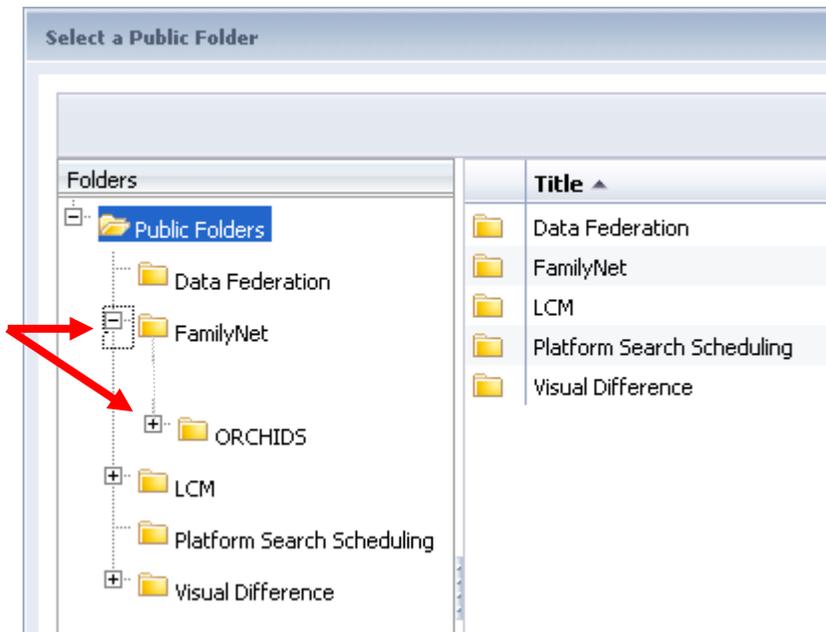
6. Click on the radio button to the left of the “Folders” field. The fields below it turn black.



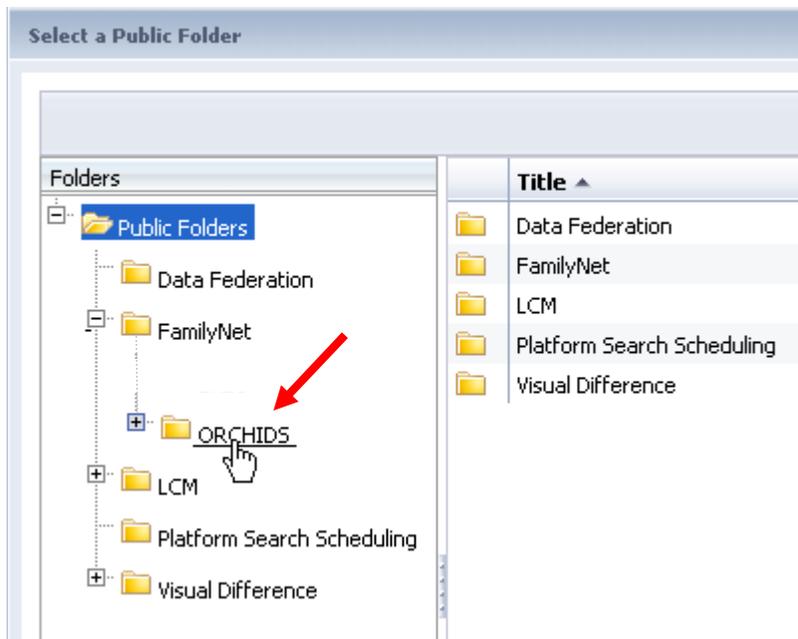
7. Click on the radio button to the left of the “Select Public Folder” field. The “Browse Folder” button to the right becomes enabled and looks darker on your screen. Click on the “Browse Folder” button.



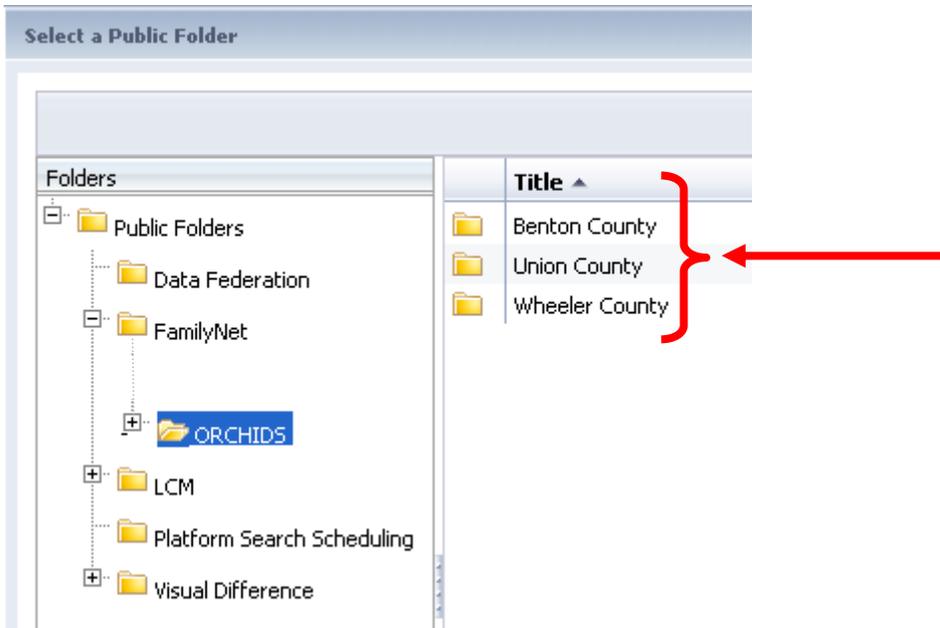
8. A new window opens on your screen. Click on the “+” sign to the left of the “FamilyNet” folder.



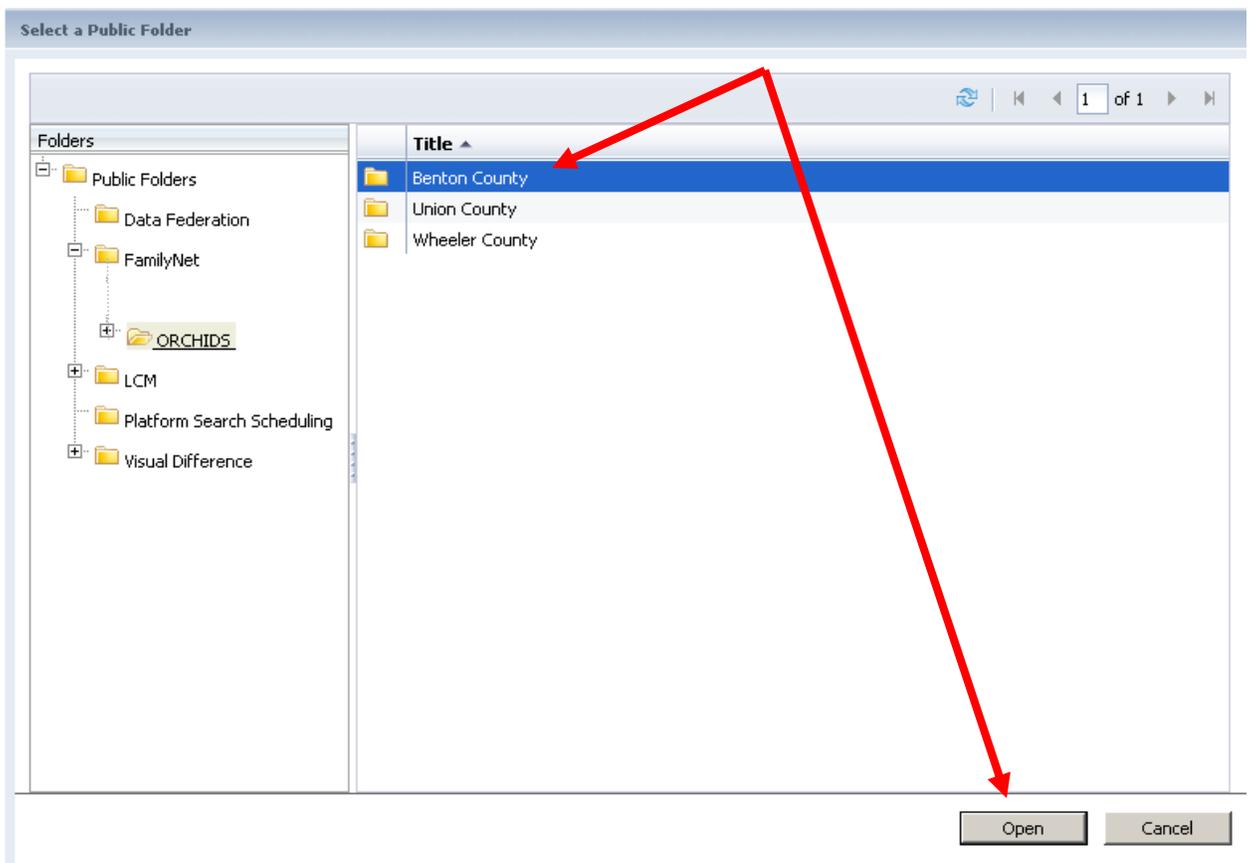
9. The “FamilyNet” folder opens. An “ORCHIDS” folder appears beneath it.



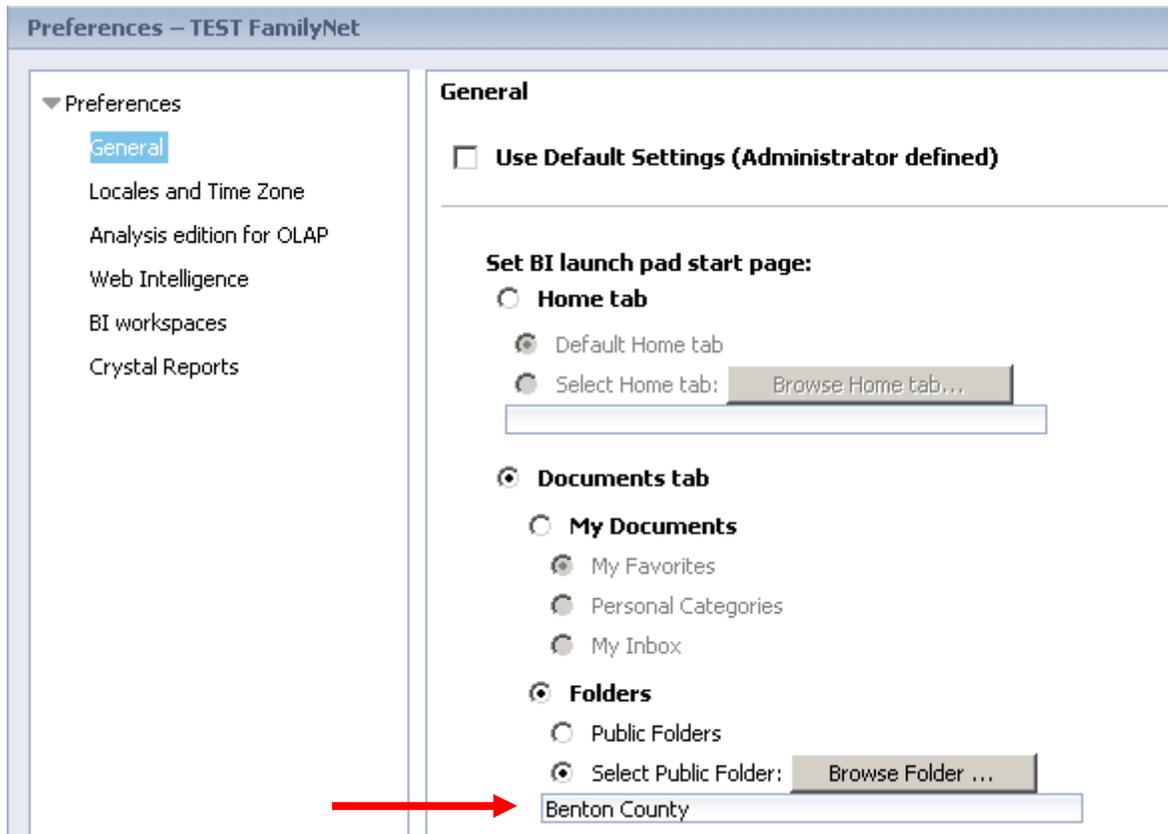
10. Click on top of the word “ORCHIDS” (to the right of the folder icon). Do not click on the “+” sign.



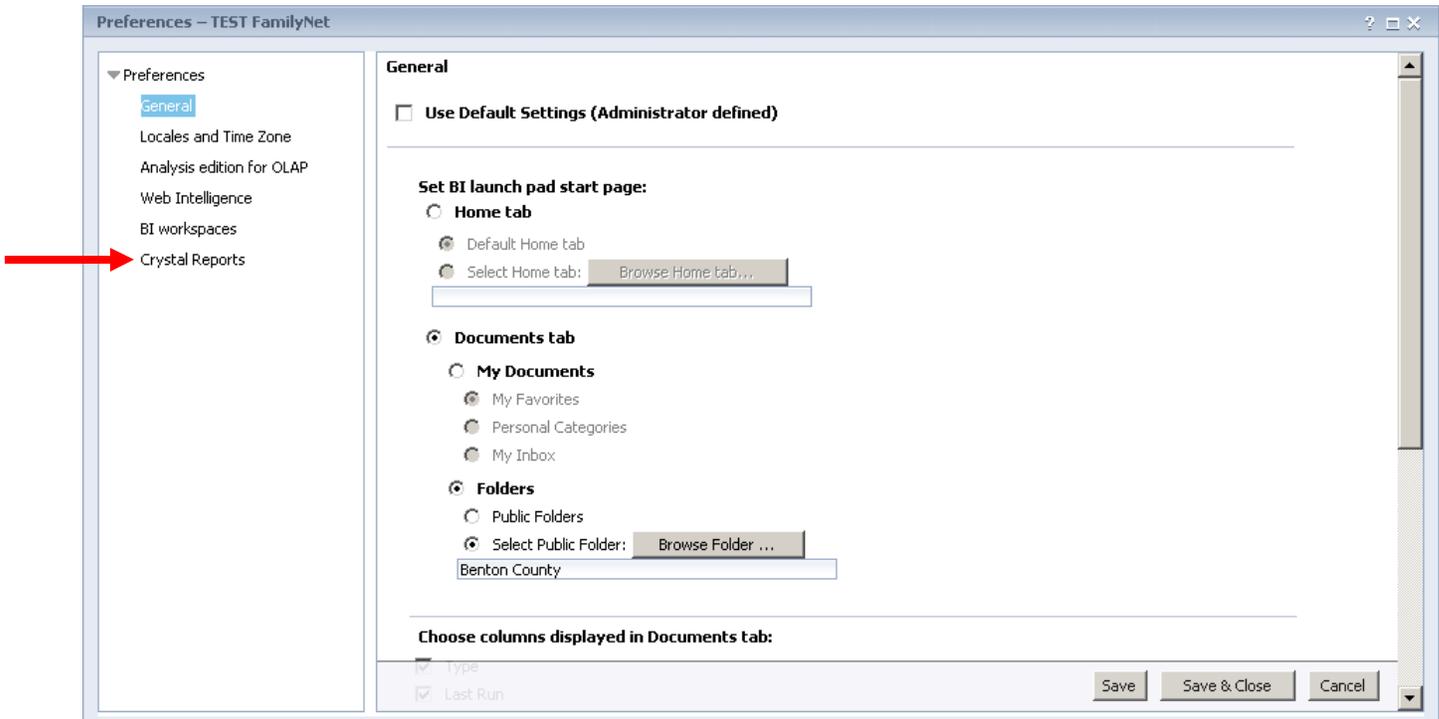
11. The name of your county should appear on the right side of your screen. Call ORCHIDS Application Support if it does not appear (971-673-0382).



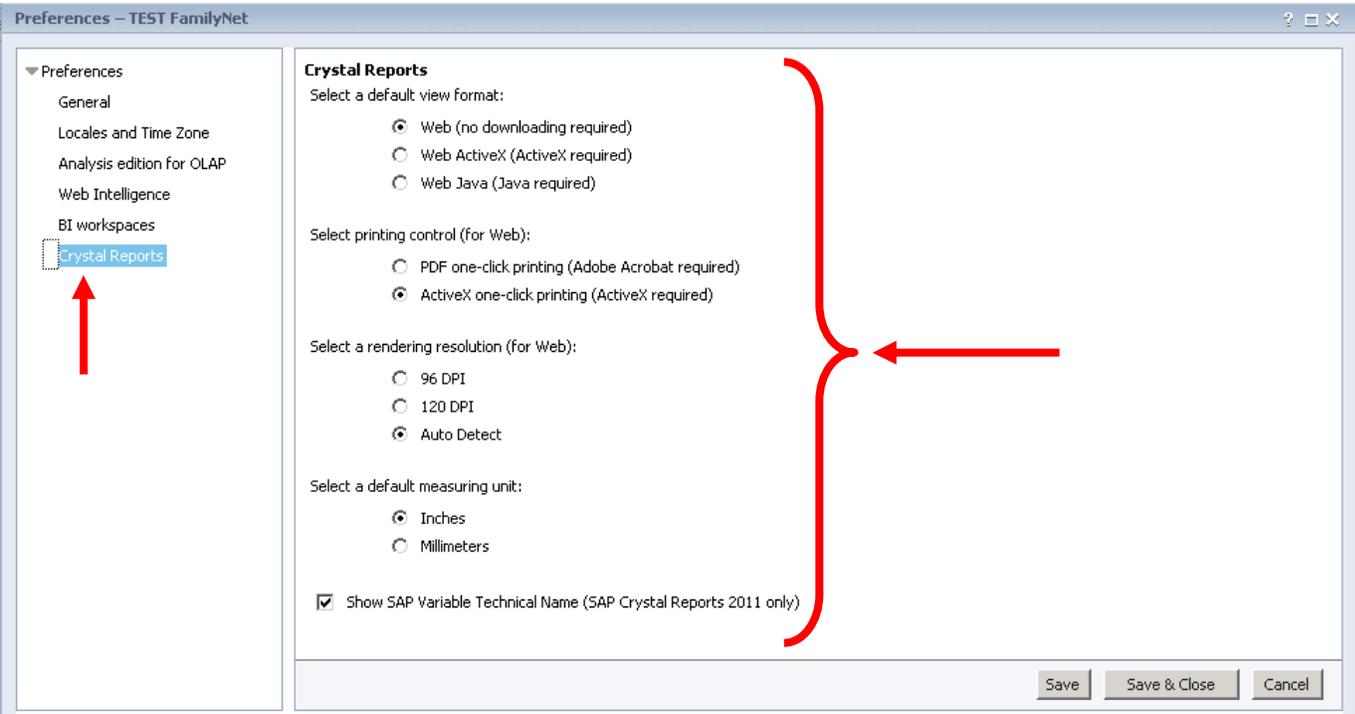
12. Click on your agency's folder. A blue stripe appears on top of it. Click on the "Open" button in the lower right corner of the window.



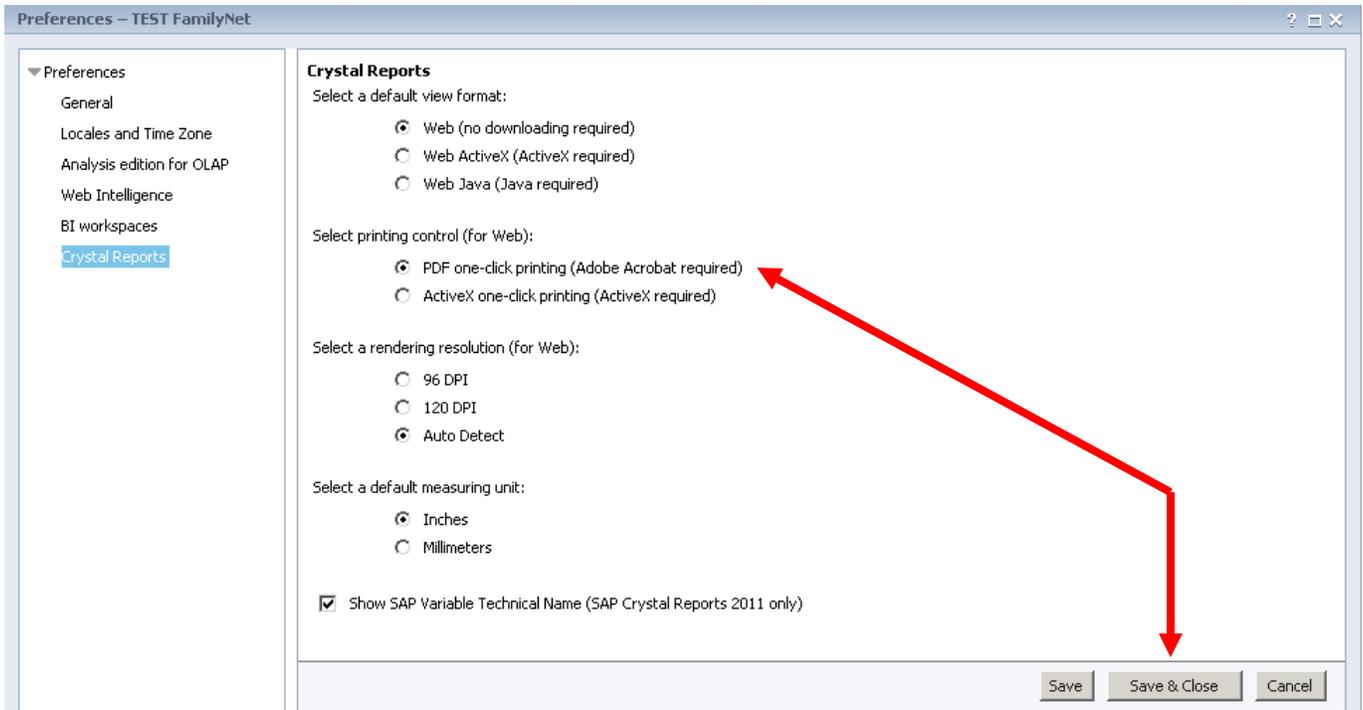
13. The window showing the file folders closes. You are back in the “Preferences” window. The name of your agency should appear beneath the “Select Public Folder” field.



14. To set up printing, find “Crystal Reports” on the left side of your screen. Click on “Crystal Reports.”



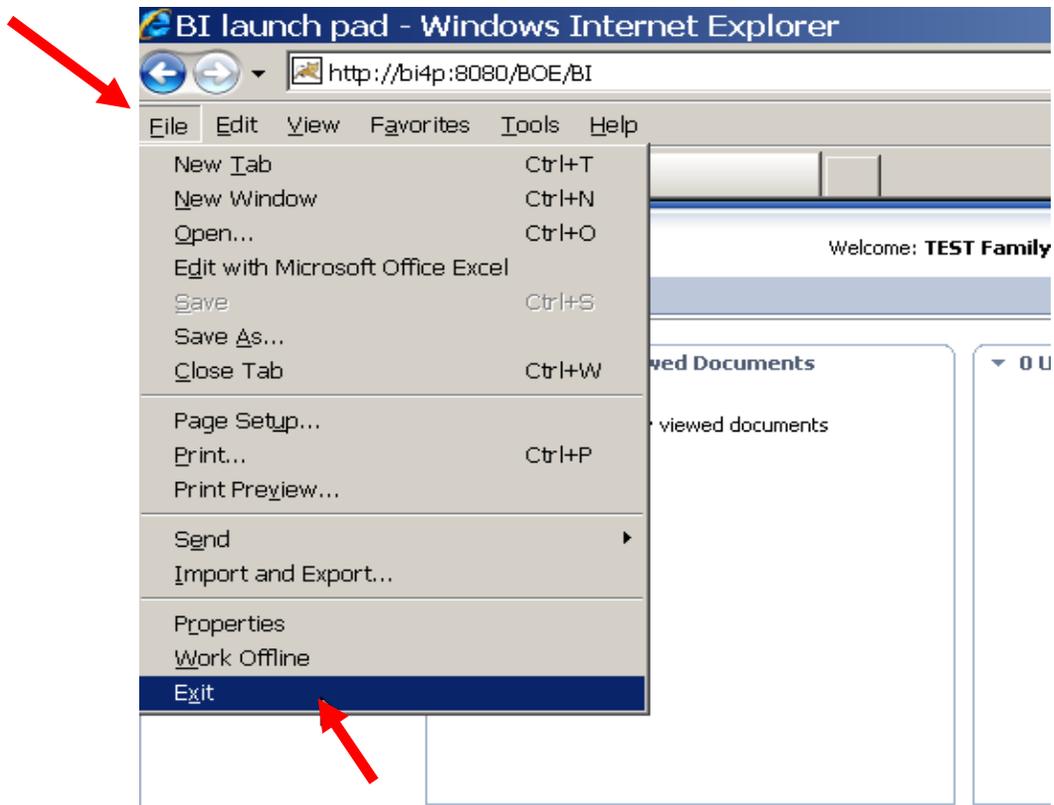
15. A blue highlight appears around “Crystal Reports” on the left side of your screen. The items on the right side of your screen change.



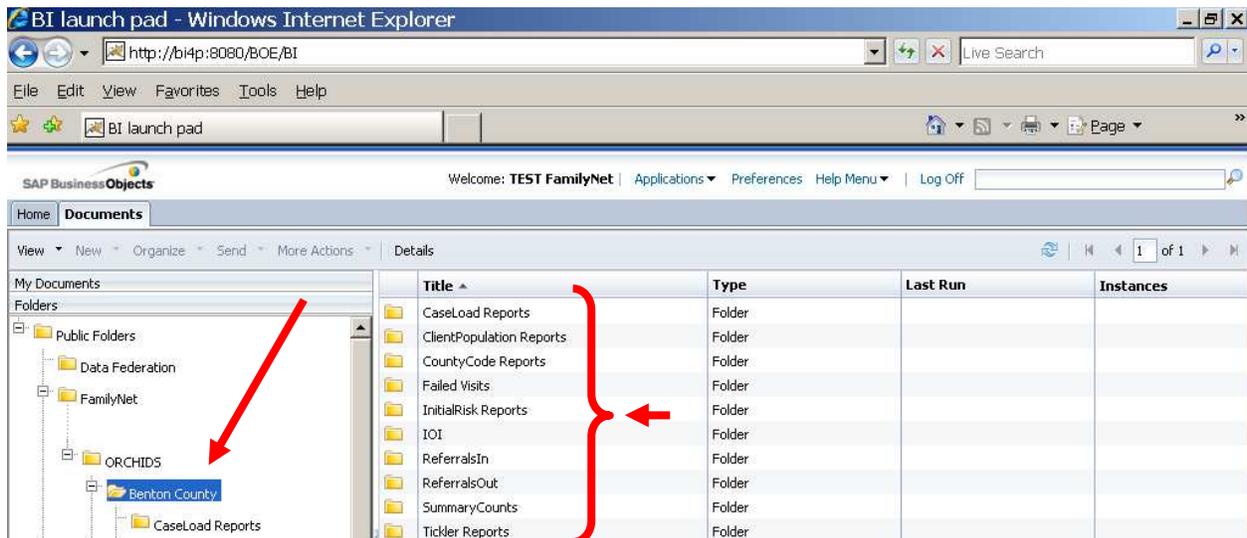
16. Click on the item “PDF one-click printing (Adobe Acrobat required)” on the right side of your screen. Then click on the “Save & Close” button in the bottom right corner of the window.



17. A message window will open on your screen. The message means that you need to log out and log back in to see the changes you have made. Click the “OK” button to close the message window.

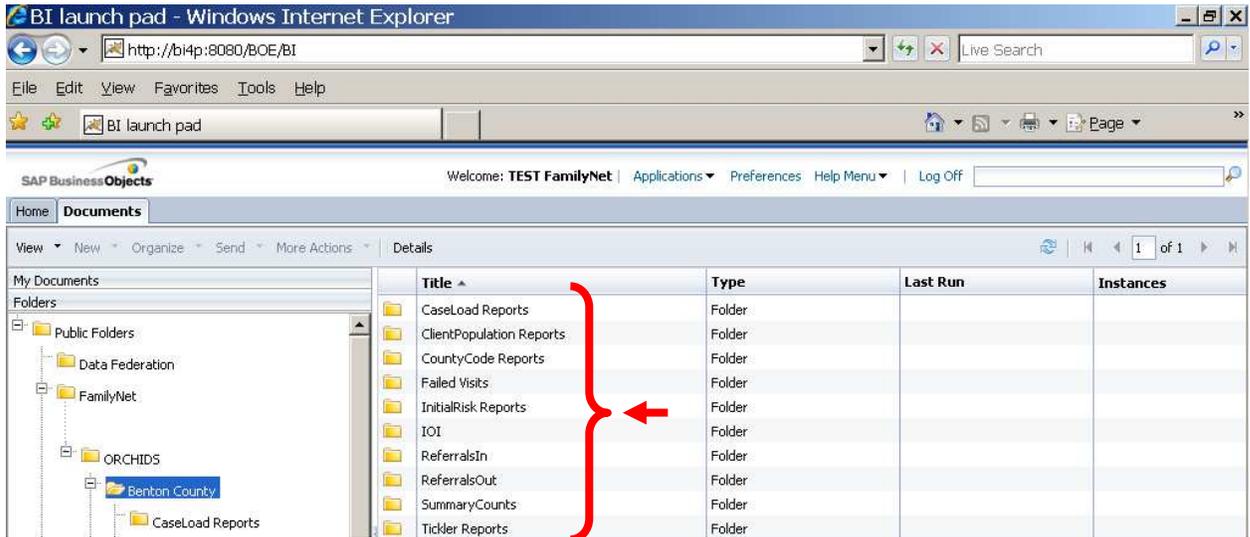


18. Close the application. One way to do this is to click on the “File” menu at the top of your screen and then select “Exit” in the drop-down list. The application closes.

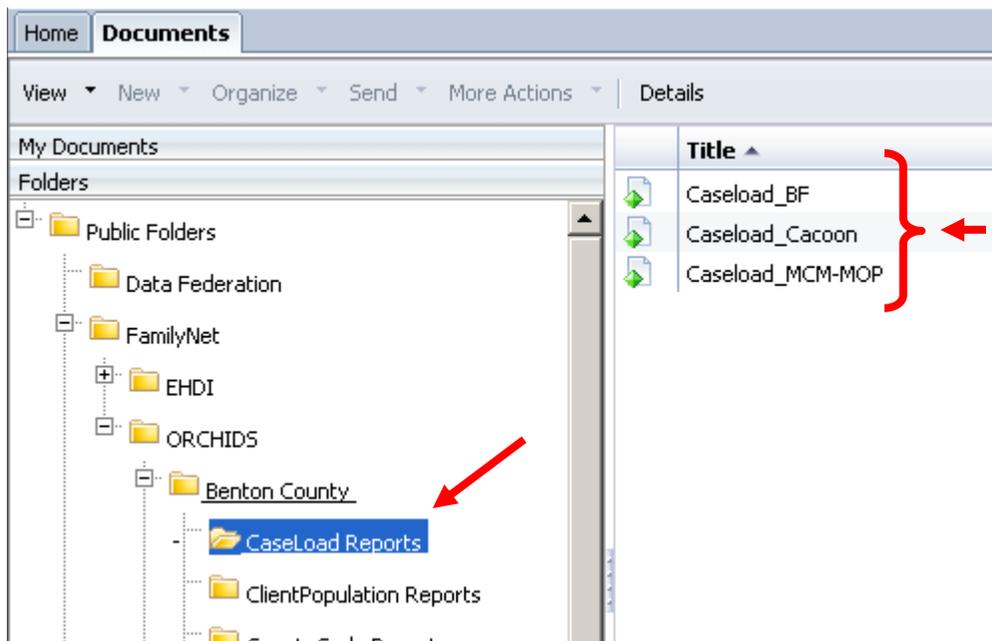


19. Log back in. (See step #4 on page 2 if you need help.) The first screen you see after the login page should show your agency’s file folder and the reports inside of it. Call ORCHIDS Application Support (971-673-0382) if you do not see your agency’s file folder and a list of reports.

Running a Crystal Report



1. A list of file folders displays on the right side of your screen. Click on one of the file folders to open it.



2. The reports inside the file folder you clicked appear on the right side of your screen. Double-click on the report you wish to run.

The screenshot shows a dialog box titled "Enter Values" with a "Date Range" section. It contains two input fields: "Start of Range:" and "End of Range:". Each field has a text box labeled "Enter a Value:" and a calendar icon. Below each text box are two checkboxes: "Include this value" (checked) and "No lower value" (unchecked) for the start range, and "Include this value" (checked) and "No upper value" (unchecked) for the end range. An "OK" button is centered at the bottom.

3. A window appears on your screen with one or more sets of filters. What you enter in a filter controls what appears on your report. You must enter something in each filter before the report can run. The example in the screenshot above is a date filter. There are also other types of filters on your reports. Each type of filter is described below.

Visit Date Filter: You use a date filter to define the date range of your report. Nearly every ORCHIDS Crystal report has a date filter. In the “Start of Range” field, enter the start date for your report. In the “End of Range” field, enter the end date for your report.

Type your dates with slash marks: m/d/yyyy or mm/dd/yyyy. Click on the  button to run your report. There will be a pause before the report appears on your screen.

This screenshot is similar to the first one but shows the "Enter Values" dialog box with data entered. The "Start of Range:" field contains "07/01/2011" and the "End of Range:" field contains "06/30/2012". Red arrows point to the text boxes. The "OK" button at the bottom is circled in red, with a red arrow pointing to it from the right.

Enter Values

Enter Visit Dates: Visit Dates

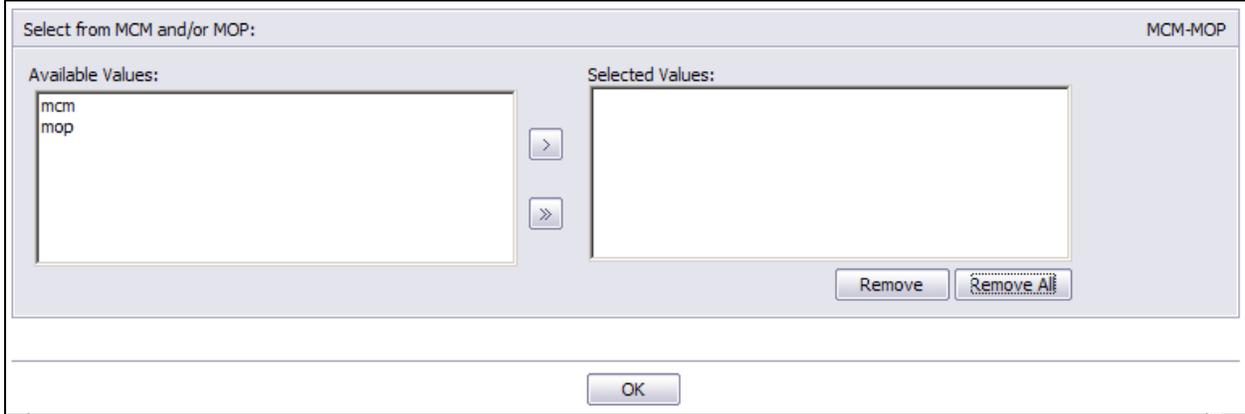
Start of Range: Enter a Value: Include this value No lower value

End of Range: Enter a Value: 12/31/2011 Include this value No upper value

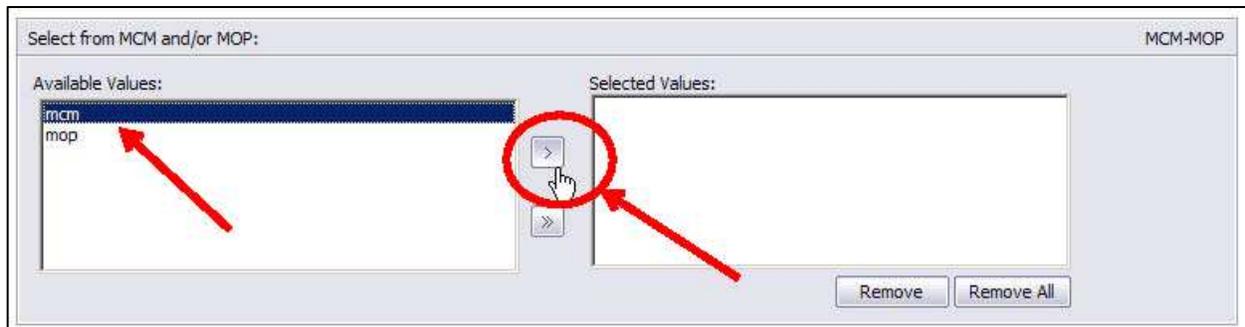
OK

Note: You can also run a report with no limit on the lower range OR the upper range. The example above will create a report with no limit on the lower date range, because a checkmark appears in the “No lower value” checkbox. Your report will include every visit date up to and including 12/31/2011. You cannot run a report with no lower range AND no upper range.

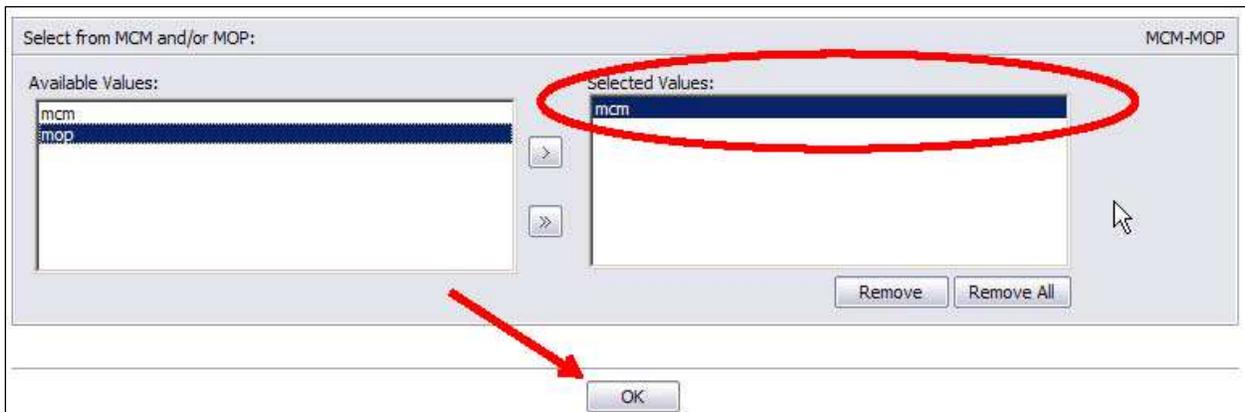
Two other types of filters appear on some reports and are described below.



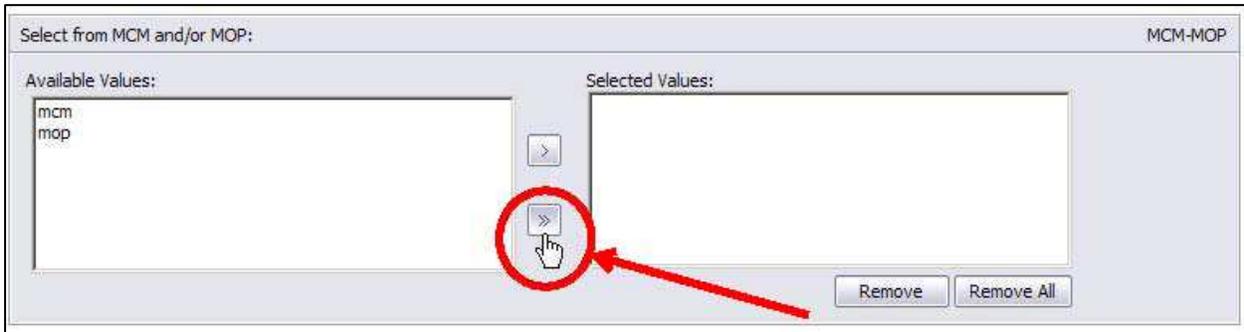
MCM-MOP Program Filter: Above is the program filter for MCM and MOP reports. All MCM-MOP reports have a program filter that allows you to create a report with only MCM data, only MOP data, or MCM and MOP data combined.



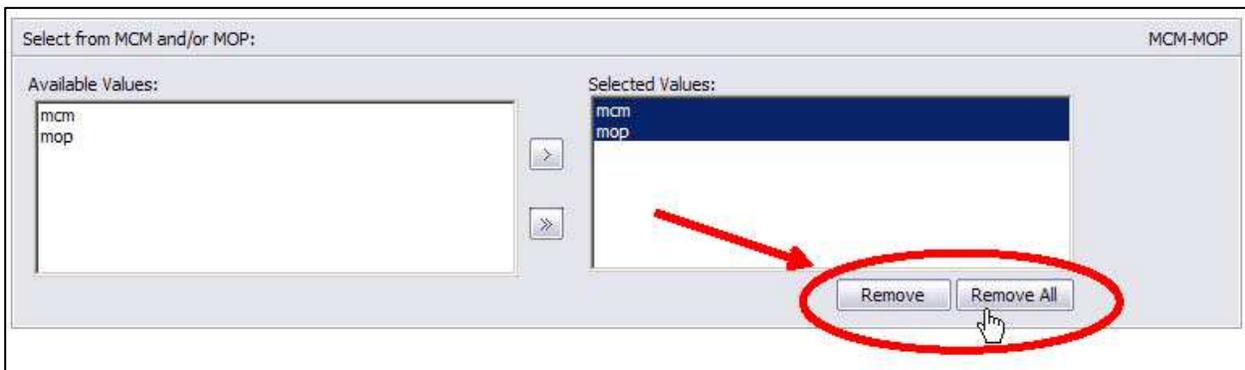
In the left window of the program filter, click on the program name. Then click on the forward arrow between the left and right windows. (Or, simply double-click on the program name in the left window.)



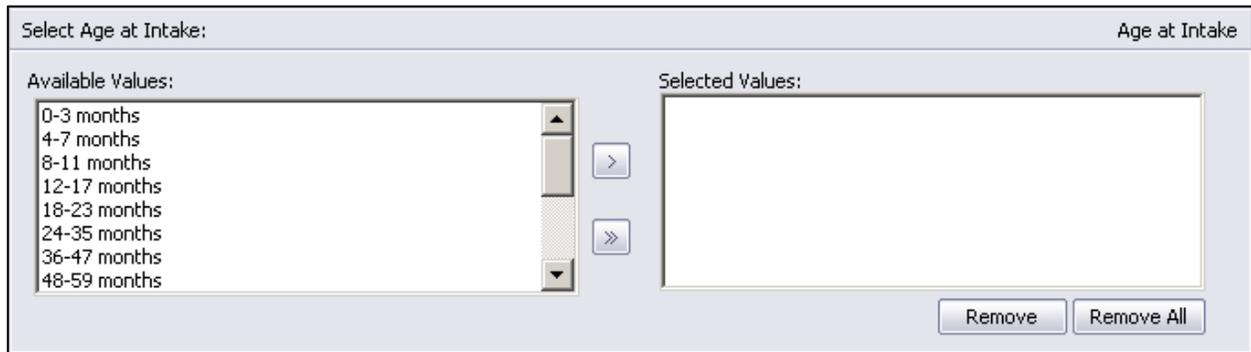
The program name appears in the right window. Your report will show data for the program or programs that appear in the right window. Click the “OK” button to run your report.



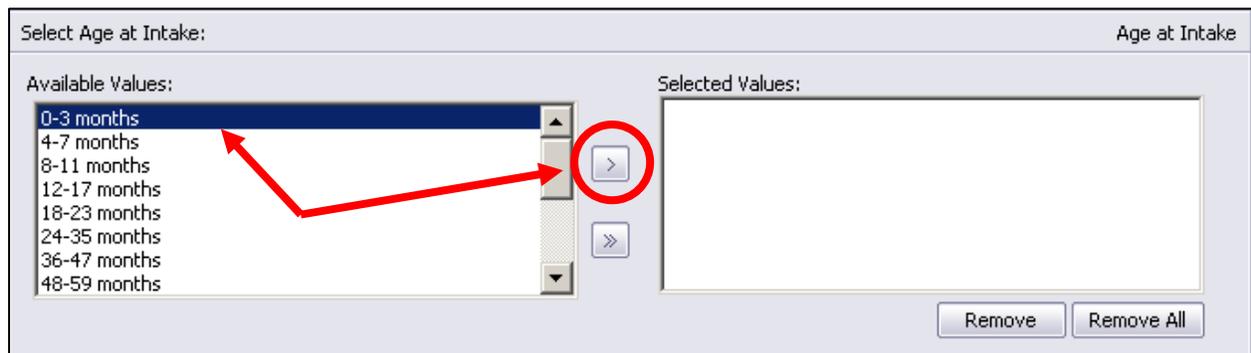
You can select each program one by one, or you can select both programs by clicking once on the double forward arrow button.



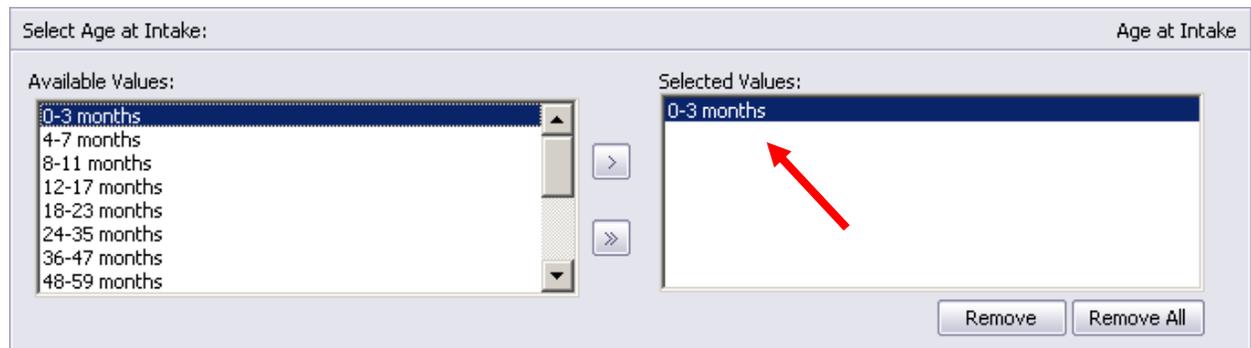
You can remove programs from the right window by clicking on one of the “Remove” buttons. Whatever program is highlighted in the right window when you click the “Remove” button will disappear from the window. The “Remove All” button will remove both programs even if they are not selected on the screen.



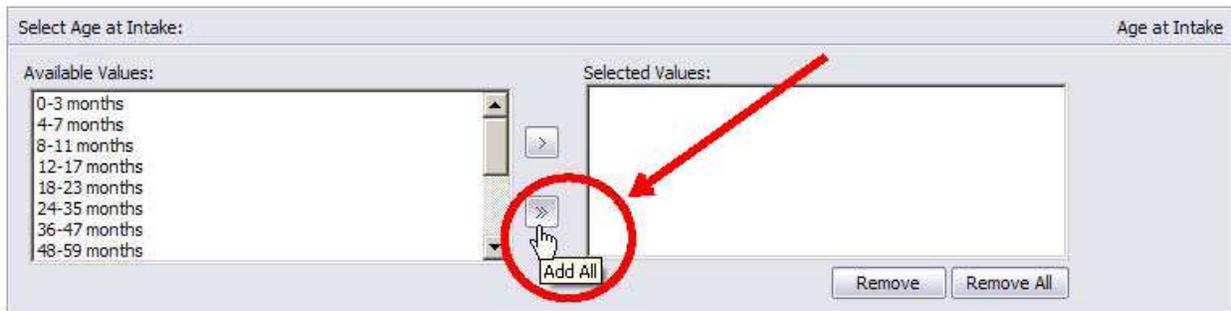
Age at Intake Filter: The filter above appears when you try to run the Client Population Summary report. You can use this filter to create a report about clients that were specific ages when they entered the program.



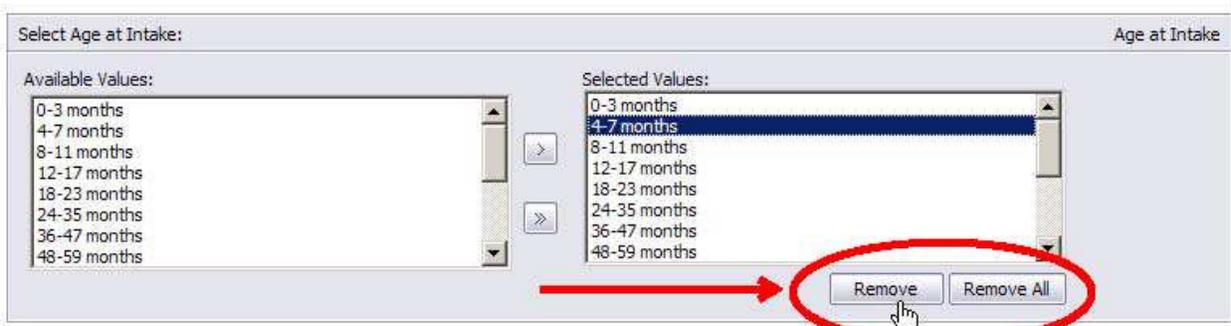
In the left window on your screen, click on the age group or groups that you wish to include on your report. Click on the forward arrow between the left and right windows. (Or, simply double-click on each age range you wish to select.)



The age group or groups you selected will appear in the right window. Report data will be limited to the age group(s) that appear in the right window.



You can select each age group by clicking on them one by one, or you can select all age groups by clicking once on the double forward arrow button.

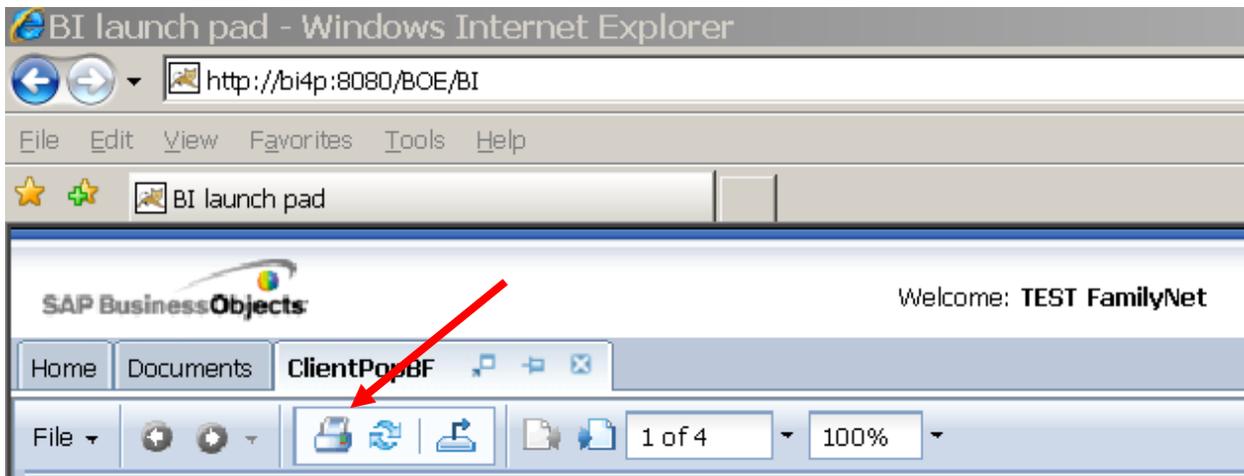


You can remove an age group from the right window by clicking on it and then clicking on the “Remove” button. Whatever program is highlighted in the right window when you click the “Remove” button will disappear from the window. The “Remove All” button will remove all age groups even if they are not selected on the screen.

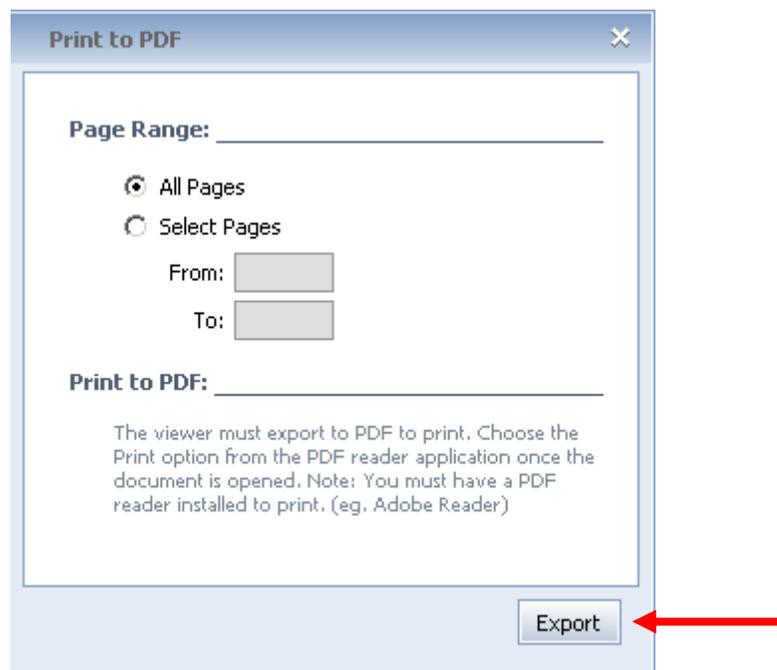
Printing (Exporting) a Crystal Report

After you have generated a report on your screen, you can print it. You will need to set your print preferences first. See page 10 in the chapter called, “Setting Your Preferences,” for help with setting your print preferences.

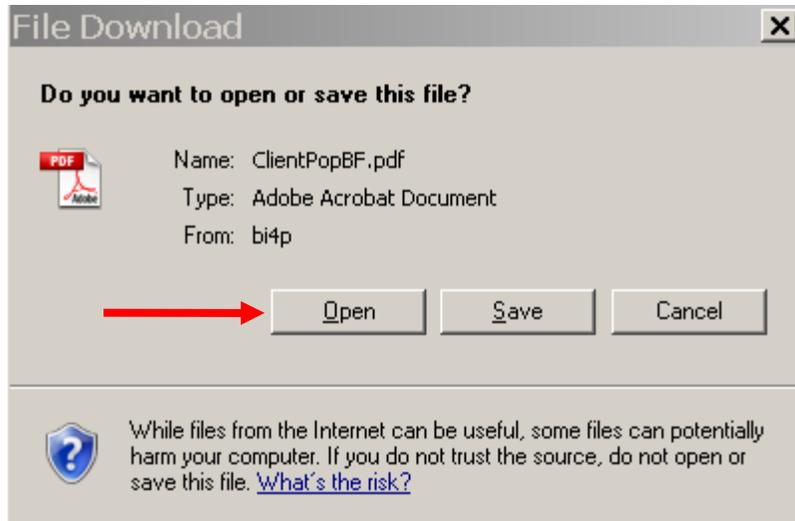
See the chapter “Running a Crystal Report,” for instructions on how to create a report.



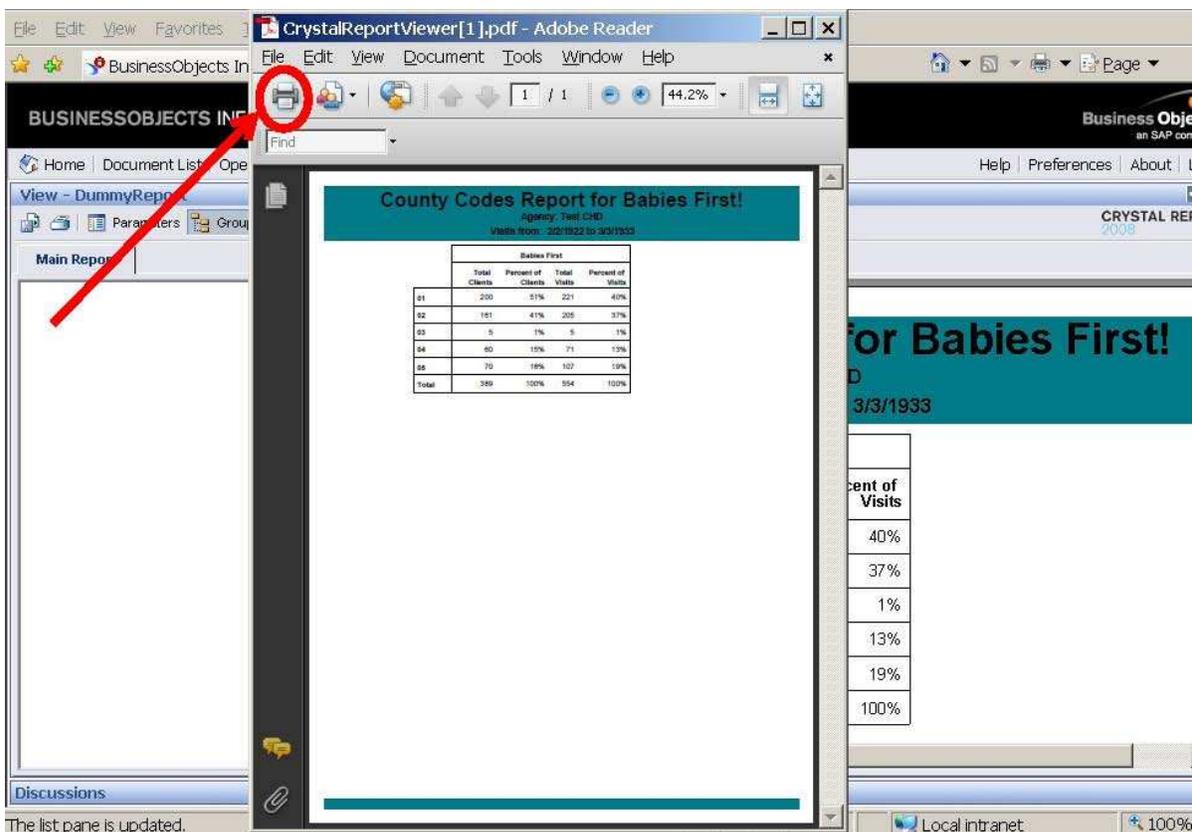
1. After you have generated a report on your screen, click on the “Print” icon in the top left area of your screen.



2. The “Print to PDF” window appears. Click on the “Export” button.



3. The “File Download” pop-up window appears. Click the “Open” button.

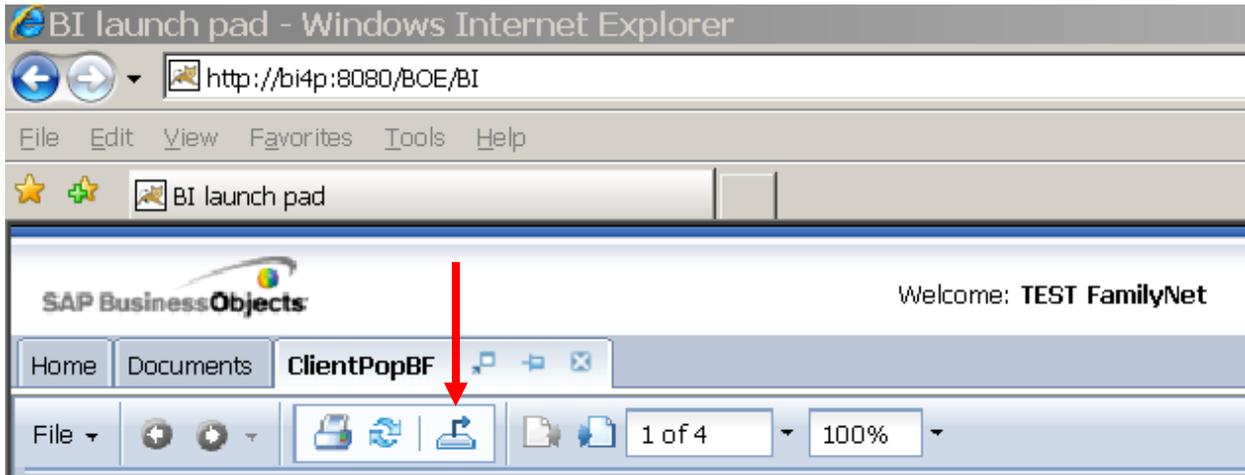


4. Crystal Report Viewer - Adobe Reader will open. Click on the “Print” icon. A print dialogue box will open, and you will do whatever you normally do to print any document on your computer. At this point, your report is no longer inside of the Business Objects environment.

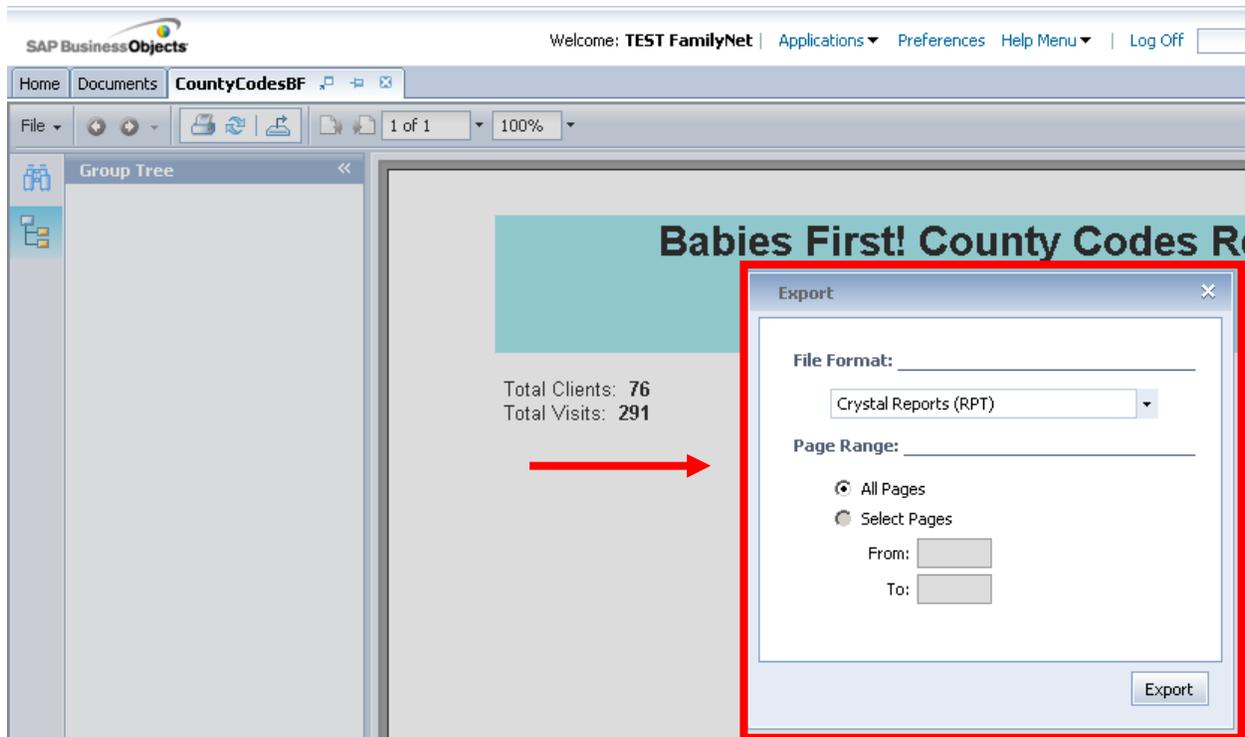
Saving (Exporting) a Crystal Report

After you have generated a report on your screen, you can save it. You can also save a document and then print it within another application. Run a report on your screen.

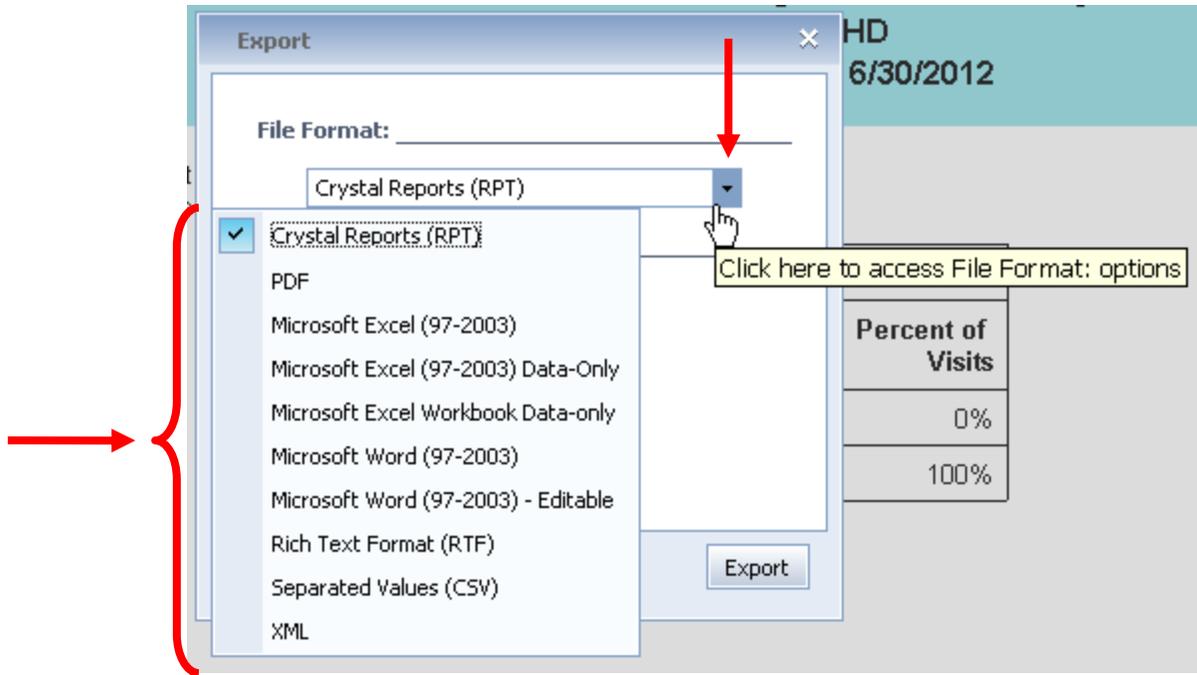
See “Running a Crystal Report,” for instructions on how to create a report.



1. After the report appears on your screen, click on the “Export this report” icon in the upper left area of your screen.

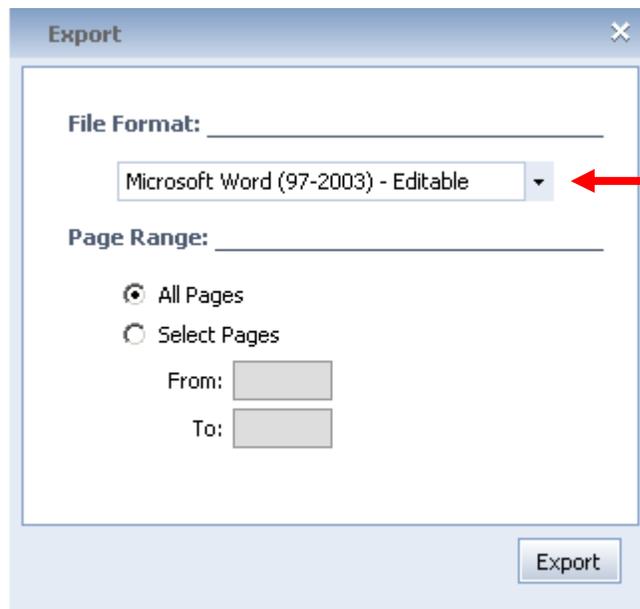


2. The “Export” pop-up window appears.

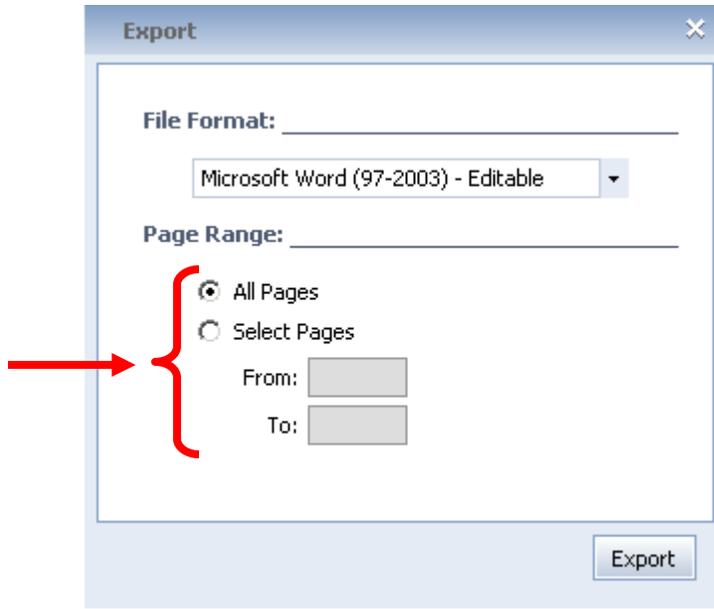


3. Click on the down arrow to open the list of file formats that are available. You can save your report in any of the file formats in the list. Click on the file type you want for your report.

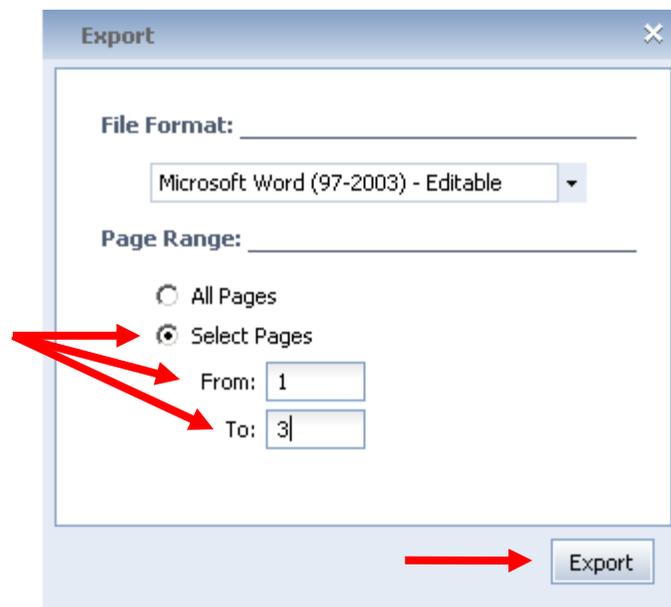
Note: If you save your report as a Crystal Report, you must have Crystal Reports installed on your computer in order to open it. It would probably be most useful for you to select a file type that the software on your system can open when you are not logged into Business Objects.



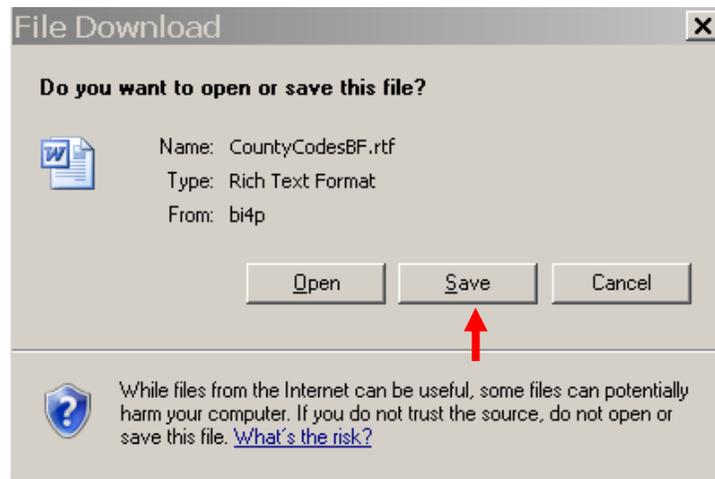
4. The "File Format" list closes. Your selection displays in the field.



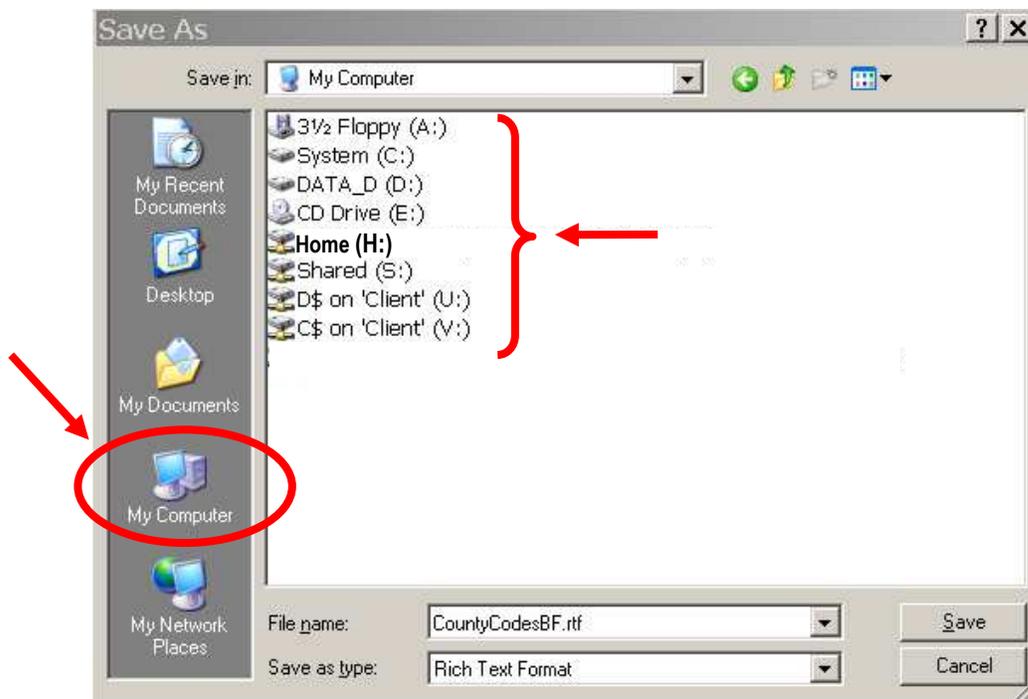
5. You can choose to save all pages of your report or only some pages of your report.



6. If you want to save only certain pages of your report, click on “Select Pages” and then enter a start page in the “From” field and an end page in the “To” field. Click on the “Export” button to create your file.



7. A “File Download” window appears. Click on the “Save” button.



8. A “Save As” window opens. Click on “My Computer” in the lower left side of this window. A list of computer drives appears in the window. The drives are a combination of drives you can access on your computer system and drives that you cannot access on a state server in Salem. Read the text below before you select a drive . . .

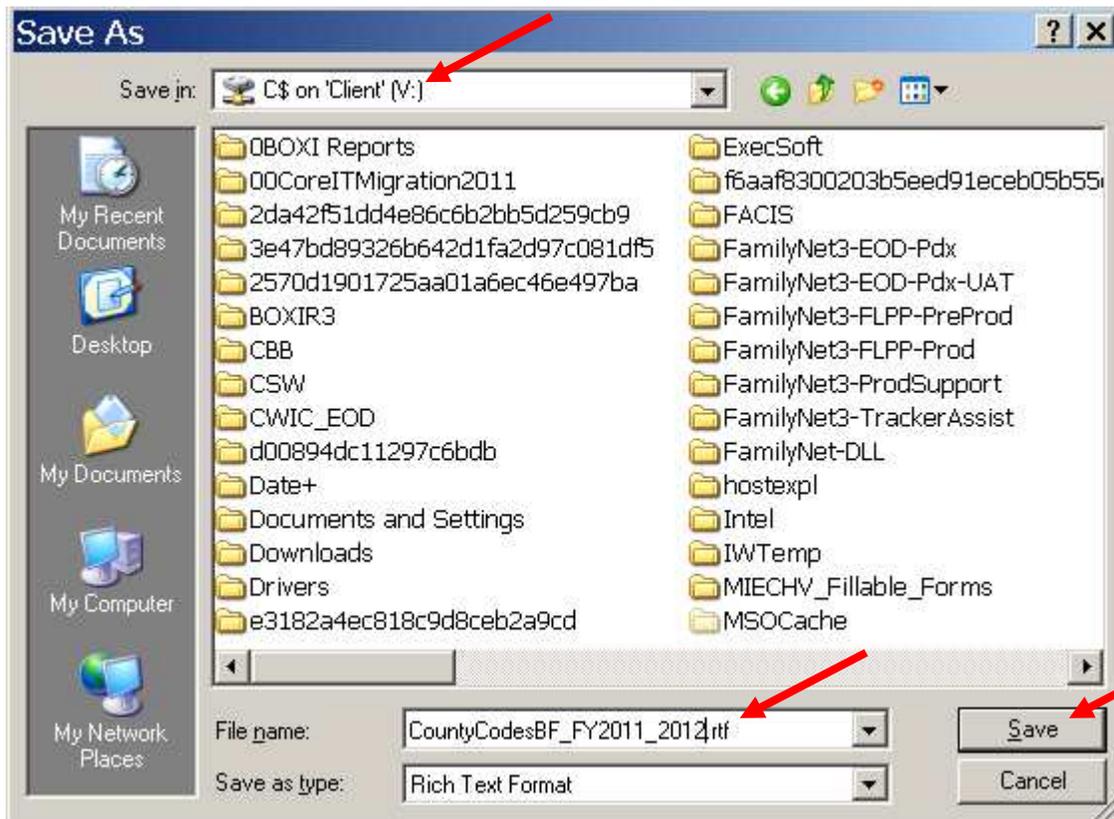
This is what you see in the picture above:

- 3½ Floppy (A:) IGNORE this drive! It’s on a state server in Salem.
- System (C:) & Data_D (D:) IGNORE these drives! They’re on state servers in Salem.
- **Home (H:) This is your “home” network drive, which is a secure place to save client-identified data.** It’s secure, because a passworded login is required to access it.
- D\$ on ‘Client’ (U:) & C\$ on ‘Client’ (V:) Note the word “Client”—that means you! These two items are hard drives on your computer. If you save client-identified data on

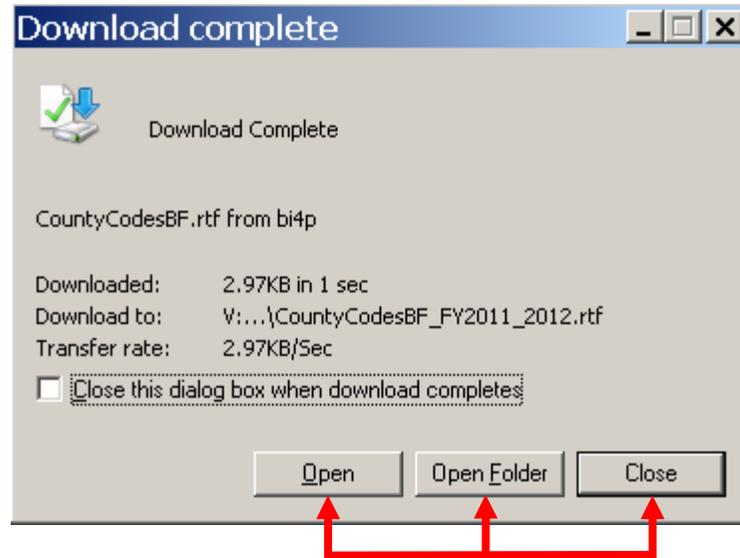
a hard drive, you should move it to a passworded network drive after you have logged out of Business Objects.

Be attentive to where you save reports!! When you save a report to any of the drives on the state servers, you will lose them forever. If you save a report that identifies any clients, you should be careful not to leave the report on a hard drive. Anyone that logs into your computer will have access to reports saved on **D\$ on 'Client' (U:)** or **C\$ on 'Client' (V:)**.

Double-click on the drive where you want to save your report.



9. The name of the drive you double-clicked appears in the “Save As” window. Name your file and click on the “Save” button.
Note: Always type in a new name for the report if you plan to save more than one report. Otherwise, each new report will replace (be saved over) the previous report you saved.



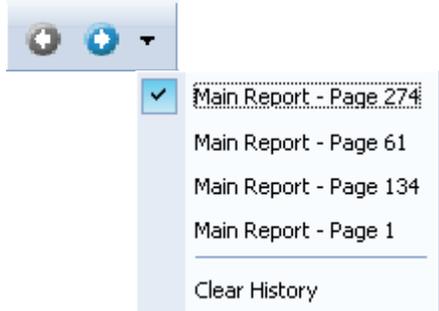
10. The “Download Complete” window appears and offers you three choices.

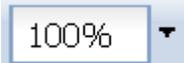
- If you click the “Open” button, your report will open using software on the state server. An Excel file will open inside of Excel, a Word document will open inside of Word, etc. Some of the reports can be edited. If you make any changes, be careful where you save the changes.
- If you click the “Open Folder” button, the file directory where you saved your report will open.
- If you click the “Close” button, the window will close. You will be looking at the report you created, inside of the Business Reports Crystal Reports environment.

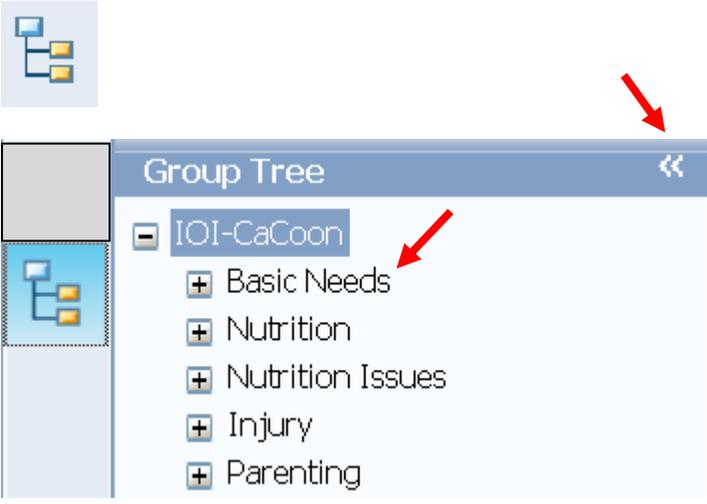
Screen Icons

There are icons available on your screen that are shortcuts for moving between different screens or performing certain functions. Below is a picture of each icon with a description.



Screen Icons	Icon and Description
	<p>“Go Back” icon (left arrow) “Go Forward” icon (right arrow) “History” icon (the down arrow)</p> <p>These icons are useful if you are looking at a very long report and need to jump around within the report. If you have been using the “Group Tree” icon (see below) and have been looking at different client records or different staff caseloads, these icons can be useful for easy navigation.</p> <p>The “Go Back” icon will take you back to the previous page you viewed in the report.</p> <p>The “Go Forward” icon will return to the page you left when you clicked the “Go Back” icon.</p> <p>The “History” icon will open a list of all the pages you have visited within your report. At the bottom of the list is an option to “Clear History” or delete the list.</p>
	<p>“Print this report” icon</p> <p>Click on this icon to print your report. (Note: you must set your print preferences before this icon will work correctly. See the chapter called, “Setting Your Print Preferences.”)</p>

Screen Icons	Icon and Description
	<p>“Refresh Report”</p> <p>This is a shortcut to the screen where you can change the date range or make different selections in other report filters, such as Age at Intake or Staff. Use this icon to save steps when you want to run multiple versions of the same report.</p>
	<p>“Export this report” icon</p> <p>Use this icon to save a copy of your report.</p>
	<p>“Go to Previous Page” icon “Go to Next Page” icon</p> <p>These icons move you one page back or one page forward. This is one way to scroll through the multiple pages of a report.</p>
	<p>“Page Navigation” icon</p> <p>Click your cursor into the white box and type a page number. Press the “Enter” key on your keyboard. You will be taken to that page.</p> <p>If you click the down arrow to the right of the white box, a menu opens. Click on “Go to First Page” or “Go to Last Page” to be taken to the first or last page in your report.</p>
	<p>“Zoom”</p> <p>Click on the icon’s down arrow. Select a percentage in the drop-down list to make the report larger or smaller on your screen.</p> <p>Or simply type the percentage of zoom you’d like to use and press the “Enter” key on your keyboard.</p>

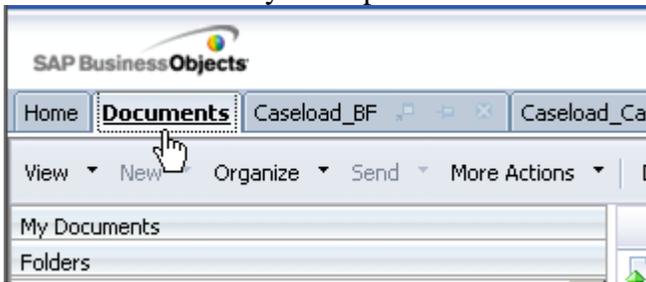
Screen Icons	Icon and Description
 <p>The image shows a blue binocular icon representing the 'Find' function. Below it is a screenshot of a 'Find' search field with a white input box and a blue binocular icon on the right side.</p>	<p>“Find” icon, “Search for text” icon</p> <p>Click on the “Find” icon to make the “Search for text” field appear on your screen.</p> <p>To find text within your report, insert your cursor in the white box and type the text you would like to find. Click on the binocular inside the “Find” field or press the “Enter” key on your keyboard. All instances of the text you are searching for will be highlighted in gold.</p>
 <p>The image shows a blue tree icon representing the 'Group Tree' function. Below it is a screenshot of the 'Group Tree' navigation panel. The panel has a blue header with the text 'Group Tree' and a double white arrow icon on the right. The main area contains a list of items: 'IOI-CaCoon' (with a minus sign icon), 'Basic Needs', 'Nutrition', 'Nutrition Issues', 'Injury', and 'Parenting' (all with plus sign icons). Red arrows point to the 'IOI-CaCoon' item and the double white arrow icon.</p>	<p>“Show Group Tree” icon, “GroupTree” navigation panel</p> <p>Click on the “Show Group Tree” icon to open the “Group Tree” navigation panel. Some reports display an index in this window that shows information on your report. If you click on an item in the index (for example, “Basic Needs”), you will be taken to the first instance where that item appears in your report. “Basic Needs” will be highlighted in gold wherever it appears on your report.</p> <p>To close the “GroupTree” window, click on the double white arrows to the right of the “GroupTree” label.</p>

Troubleshooting

I'm lost and can't find the screen I need.

Navigating can feel awkward when you first start using the Crystal Reports. Two of the most useful tools for moving between screens are the “Refresh” icon and the “Document List” menu.

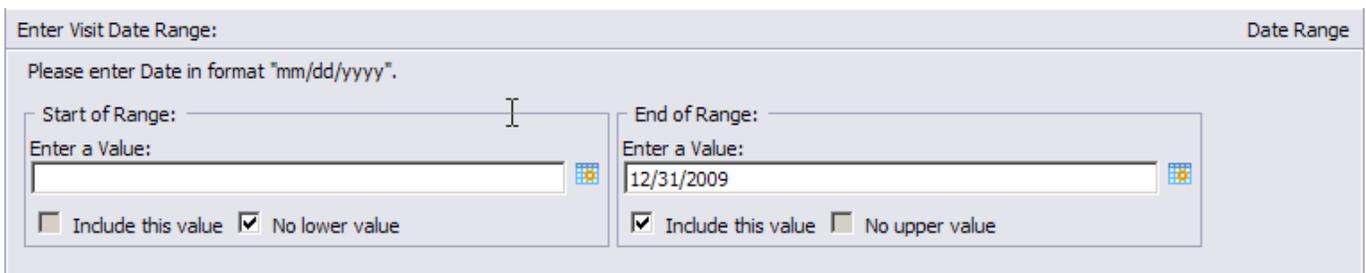
- The “Refresh” icon () is located in the toolbar at the top of your screen. Click on this icon to change your filter selections for a report. For instance, you would use this icon to run the same report for a different time period.
- The “Documents” link is located in your menu bar at the top of your screen. Click on this link to see list of all your reports.



I clicked the “OK” button on the screen with the filters, but nothing happened.

You probably skipped one of the filters. Make sure you have made a selection in every filter.

Note: The date filters require two dates, a start date and an end date for the report. You must enter a start date and an end date for the report OR you must use the special checkboxes below the date filters if you wish to leave either the start or end date unrestricted.

A screenshot of a date range filter dialog box titled 'Enter Visit Date Range:'. The dialog has a 'Date Range' label in the top right corner. Below the title, it says 'Please enter Date in format "mm/dd/yyyy".'. There are two input fields: 'Start of Range:' and 'End of Range:'. The 'Start of Range:' field is empty, and the 'End of Range:' field contains '12/31/2009'. Below each input field are two checkboxes: 'Include this value' and 'No lower value' (for the start) or 'No upper value' (for the end). The 'No lower value' checkbox is checked, and the 'No upper value' checkbox is unchecked.

The date filter above will select all visit dates that occurred on or before 12/31/2009.

Enter Visit Date Range: Date Range

Please enter Date in format "mm/dd/yyyy".

<p>Start of Range:</p> <p>Enter a Value:</p> <input type="text" value="12/31/2009"/> <p><input checked="" type="checkbox"/> Include this value <input type="checkbox"/> No lower value</p>	<p>End of Range:</p> <p>Enter a Value:</p> <input type="text"/> <p><input checked="" type="checkbox"/> Include this value <input checked="" type="checkbox"/> No upper value</p>
--	--

The date filter above will select all visit dates that occurred on or after 12/31/2009.

My report won't print.

Have you set your print preferences? Follow the instructions in the chapter, "Setting Your Print Preferences." This is a process that you need to complete only once. Until you set your print preferences to PDF, you will not be able to print a report.

Call ORCHIDS App Support if you are still unable to print: (971) 673-0382.

I ran my report, but there is no data on it. All I see are headings.

There is no data to report for the selections you made in the filters. Click on the "Refresh"



icon () in your toolbar. You will return to the screen with the filters. Review what you selected in each filter. Correct what you entered in the report filters and click the "OK" button to try running the report again.

I saved a report, but I can't find it.

When you are inside of Business Objects Crystal Reports and you save a report, most of the network drives listed in the "Save As" window are on the state server in Salem. The only drive that appears in the dialogue box that you can access is called, "C\$ on 'Client' (V:)." In some agencies, you may also one or more of your network drives. See the chapter called, "Saving (Exporting) a Crystal Report" for more information.

Do you still have questions?

Please contact ORCHIDS Application Support:
 (971) 673-0382 or orchids.app-support@state.or.us

Caseload Report

The Caseload Report lists any client that was seen by your agency's staff within the date range. Clients are grouped according to the home visitor that has seen the client.

The report includes some basic information about each client, such as the client's name, date of birth, state id. number, and local id. number. All visit dates that occurred within the report's date range are listed for each client, along with the age or corrected age of the client on each visit date. In addition, the report shows the issues and any county codes recorded for each visit.

The following two pages show a Caseload report. The report displays in full on the first page. The second page shows the same report marked up with descriptions of what each field on the report means.

Babies First! Caseload Report

Agency: Deschutes CHD

Visits From: 1/1/1930 To: 6/30/1931

Staff: Nurse2, Betty

Total Clients: 1
Total Visits: 7

Date of Birth	Name	State ID	Local ID	Visit Date	Age or Corrected Age	Issues	County Code
5/7/1930	BabiesFirst, Client4	3467642					
				5/11/1930	35 Weeks	NU, NI, PA, CD, WC, WU, IS, TO	
				5/15/1930	36 Weeks	NU, CD,	
				6/23/1930	41 Weeks	NU, PA, CD, WU,	
				8/7/1930	1 Months	NU, PA, CD, WC, WU, IS,	
				9/17/1930	3 Months	NU, IN, PA, CD, WC, WU, IS,	04
				1/21/1931	7 Months	NU, IN, PA, CD, WC, WU, IS,	03, 07
				5/19/1931	11 Months	NU, IN, PA, CD, WC, WU, IS, OH, TO	

Babies First! Caseload Report

Agency: Deschutes CHD
 Visits From: 1/1/1930 To: 6/30/1931
 Staff: Nurse2, Betty

Total Clients: This report includes data about 1 client.

Total Visits: The 1 client received 7 visits during the date range of this report.

Total Clients: 1
 Total Visits: 7

Date of Birth	Name	State ID	Local ID	Visit Date	Age or Corrected Age	Issues	County Code
5/7/1930	BabiesFirst, Client4	3467642		5/11/1930 5/15/1930 6/23/1930 8/7/1930 9/17/1930 1/21/1931 5/19/1931	35 Weeks 36 Weeks 41 Weeks 1 Months 3 Months 7 Months 11 Months	NU, NI, PA, CD, WC, WU, IS, TO NU, CD, NU, PA, CD, WU, NU, PA, CD, WC, WU, IS, NU, IN, PA, CD, WC, WU, IS, NU, IN, PA, CD, WC, WU, IS, NU, IN, PA, CD, WC, WU, IS, OH, TO	04 03, 07

This field shows the client's state id. no. (unique identifier in FamilyNet).

This field shows the client's id. no. (unique identifier) in a database maintained by the local agency. This client does not have a Local ID recorded in FamilyNet.

The client received visits on each of these dates. Only visits that occurred during the report's date range are included.

This column displays the client's age at each visit listed on the report. Wherever appropriate, the age will be a corrected age. Otherwise, the chronological age displays. Corrected ages are displaying for all of this premature client's visit dates.

The "Issues" column lists the topics that the home visitor assessed or addressed on each visit. The topics refer to the broad categories from the "Issues, Outcomes, and Interventions" section (IOIs) of FamilyNet ORCHIDS. These categories do not indicate how or why an issue was addressed.

Any county codes that were recorded on each visit display in this column.

County codes are used by some agencies to record specific pieces of data about clients, cases, or visits. The meaning is assigned at each local agency.

Report reflects all data entry completed as of the previous day.

Report Created On: 1/7/2011 Page 1 of 1

Client Population Summary

The Client Population Summary reports program-level information about clients and their cases. Client information on the report includes race, ethnicity, gender, insurance status and type at intake, household income (as a percentage of the current federal poverty guidelines), and SSI status. Case information on the report includes the number of clients with multiple versus single risk factors at intake, the number of visits delivered during the date range, and the number of clients in specific age groups on the most recent visit that falls within the date range. On the CaCoon Client Population Summary, there is also a breakdown of clients according to their assigned CaCoon tiers.

Only information about clients with visit dates during the date range will appear on this report.

The following ten pages show two versions of a Client Population Summary report. The first version shows the report as it appears onscreen. The second version shows the same report with descriptions of what each field on the report means.

CaCoon Client Population Summary

Agency: Deschutes CHD

Visits From: 1/1/1930 To: 12/31/1930

Total Clients: 3
 Total Cases: 3
 Total Visits: 15

	Race	
	Client Count	Percent of Clients
White	1	33%
Black or African American	2	67%
Native Hawaiian/Pacific Island	2	67%
Asian	1	33%
American Indian/Alaskan Native	1	33%
Multiple Races Checked	1	33%

	Ethnicity			
	Client Count	Percent of Clients	Visit Count	Percent of Visits
No - not Hispanic or Latino	2	66%	10	66%
Yes - Hispanic or Latino	1	33%	5	33%
Total	3	100%	15	100%

	Gender			
	Client Count	Percent of Clients	Visit Count	Percent of Visits
Female	1	33%	1	6%
Male	2	66%	14	93%
Total	3	100%	15	100%

CaCoon Client Population Summary

Agency: Deschutes CHD

Visits From: 1/1/1930 To: 12/31/1930

Total Clients: 3
 Total Cases: 3
 Total Visits: 15

	Insurance Status at Intake	
	Client Count	Percent of Clients
Insured	1	33%
Uninsured	2	66%
Total	3	100%

	Insurance Type at Intake	
	Client Count	Percent of Clients
OHP Standard	0	0%
OHP Plus	1	33%
CAWEM	0	0%
CAWEM Plus MCM/MOP	0	0%
Indian Health Service	0	0%
Private	0	0%
Other	0	0%
None	2	67%
Multiple	0	0%
Unknown	0	0%

	Household Income (% Federal Poverty Level)			
	Client Count	Percent of Clients	Visit Count	Percent of Visits
<100%	2	66%	14	93%
100%-200%	1	33%	1	6%
Total	3	100%	15	100%

CaCoon Client Population Summary

Agency: Deschutes CHD

Visits From: 1/1/1930 To: 12/31/1930

Total Clients: 3
 Total Cases: 3
 Total Visits: 15

	SSI			
	Client Count	Percent of Clients	Visit Count	Percent of Visits
Unknown	3	100%	15	100%
Total	3	100%	15	100%

	Risk Factors at Intake			
	Case Count	Percent of Clients	Visit Count	Percent of Visits
Single	1	33%	5	33%
Multiple	2	67%	10	67%
Unknown	0	0%	0	0%

	CaCoon Tier			
	Case Count	Percent of Cases	Visit Count	Percent of Visits
Tier 0	0	0%	0	0%
Tier 1	0	0%	0	0%
Tier 2	1	33%	5	33%
Tier 3	1	33%	9	60%
Tier 9	0	0%	0	0%
Unknown	1	33%	1	7%

CaCoon Client Population Summary

Agency: Deschutes CHD

Visits From: 1/1/1930 To: 12/31/1930

Total Clients: 3
Total Cases: 3
Total Visits: 15

	Number of Visits			
	Client Count	Percent of Clients	Visit Count	Percent of Visits
1-2 Visits	1	33%	1	7%
3-4 Visits	0	0%	0	0%
5-9 Visits	2	67%	14	93%
>9 Visits	0	0%	0	0%
Total	3	100%	15	100%

CaCoon Client Population Summary

Agency: Deschutes CHD

Visits From: 1/1/1930 To: 12/31/1930

Total Clients: 3
 Total Cases: 3
 Total Visits: 15

	Age at Most Recent Visit	
	Client Count	Percent of Clients
0-3 months	2	67%
4-7 months	0	0%
8-11 months	1	33%
12-17 months	0	0%
18-23 months	0	0%
24-35 months	0	0%
36-47 months	0	0%
48-59 months	0	0%
5-12 years	0	0%
13-15 years	0	0%
16-17 years	0	0%
18-19 years	0	0%
20-24 years	0	0%
25-29 years	0	0%
30-34 years	0	0%
Over 35 years	0	0%
Unknown	0	0%
Total	3	100%

CaCoon Client Population Summary

Agency: Deschutes CHD

Visits From: 1/1/1930 To: 12/31/1930

Total Clients: 3
Total Cases: 3
Total Visits: 15

This report includes data about 3 clients.

The 3 clients were enrolled in 3 cases.

The 3 clients received 15 visits during the date range of this report.

Client Count: There were 2 clients receiving services that reported Native Hawaiian/Pacific Island ancestry.

Percent of Clients: Of the total 3 clients on the report, 2 clients reported Native Hawaiian/Pacific Island ancestry.
 $2 \div 3 = 67\%$

	Race	
	Client Count	Percent of Clients
White	1	33%
Black or African American	2	67%
Native Hawaiian/Pacific Island	2	67%
Asian	1	33%
American Indian/Alaskan Native	1	33%
Multiple Races Checked	1	33%

Client Count: There was one client that reported multi-racial ancestry.

Percent of Clients: Of the total 3 clients on the report, 1 reported multi-racial ancestry.
 $1 \div 3 = 33\%$

Client Count: There were 2 clients that reported their ethnicity was not Hispanic or Latino.

Percent of Clients: Of the total 3 clients on the report, 2 reported their ethnicity was not Hispanic or Latino.
 $2 \div 3 = 66\%$

Visit Count: The 2 Hispanic/Latino clients received 10 visits during the report's date range.

Percent of Visits: Of the 15 visits on the report, 10 were delivered to Hispanic/Latino clients.
 $10 \div 15 = 66\%$

	Ethnicity			
	Client Count	Percent of Clients	Visit Count	Percent of Visits
No - not Hispanic or Latino	2	66%	10	66%
Yes - Hispanic or Latino	1	33%	5	33%
Total	3	100%	15	100%

	Gender			
	Client Count	Percent of Clients	Visit Count	Percent of Visits
Female	1	33%	1	6%
Male	2	66%	14	93%
Total	3	100%	15	100%

Client Count: There were 2 male clients

Percent of Clients: Of the total 3 clients on the report, 2 clients were male.
 $2 \div 3 = 66\%$

Visit Count: The 2 male clients received 14 visits during the report's date range.

Percent of Visits: Of the 15 visits on the report, 14 were delivered to male clients.
 $14 \div 15 = 93\%$

Report Created On: 3/2/2012 Page 1 of 5

CaCoon Client Population Summary

Agency: Deschutes CHD

Visits From: 1/1/1930 To: 12/31/1930

Total Clients: 3
Total Cases: 3
Total Visits: 15

Client Count: There were 2 clients that had no type of health insurance at intake.

Percent of Clients: Of the 3 clients on the report, 2 had no type of health insurance at intake.
 $2 \div 3 = 66\%$

Insurance Status at Intake		
	Client Count	Percent of Clients
Insured	1	33%
Uninsured	2	66%
Total	3	100%

Client Count: There was 1 client on OHP Plus.

Percent of Clients: Of the 3 clients included on this report, 1 client was on OHP Plus.
 $1 \div 3 = 33\%$

Insurance Type at Intake		
	Client Count	Percent of Clients
OHP Standard	0	0%
OHP Plus	1	33%
CAWEM	0	0%
CAWEM Plus MCM/MOP	0	0%
Indian Health Service	0	0%
Private	0	0%
Other	0	0%
None	2	67%
Multiple	0	0%
Unknown	0	0%

Household Income (% Federal Poverty Level)				
	Client Count	Percent of Clients	Visit Count	Percent of Visits
<100%	2	66%	14	93%
100%-200%	1	33%	1	6%
				100%

Client Count: There were 2 clients with household incomes of less than 100% of federal poverty.
 Percent of Clients: Of the 3 clients on this report, 2 had household incomes of less than 100% of federal poverty.
 $2 \div 3 = 67\%$

Visit Count: The 2 clients with household incomes of less than 100% of federal poverty received 14 visits.
 Percent of Visits: Of the 15 visits included on this report, 14 were delivered to clients with household incomes of less than 100% of federal poverty.
 $14 \div 15 = 93\%$

Client Population Summary

Agency: Deschutes CHD

From: 1/1/1930 To: 12/31/1930

Client Count: There were 3 clients with no data recorded in the SSI status field.
 Percent of Clients: Of the 3 clients on this report, none of them had data recorded in the SSI status field.
 $3 \div 3 = 100\%$

Visit Count: The 3 clients whose SSI status is unknown received 15 visits during the report's date range.
 Percent of Visits: All of the 15 visits included on this report were delivered to clients whose SSI status is unknown.
 $15 \div 15 = 100\%$

	SSI			
	Client Count	Percent of Clients	Visit Count	Percent of Visits
Unknown	3	100%	15	100%
Total	3	100%	15	100%

Client Count: There were 2 clients that presented with multiple risk factors at intake.

Percent of Clients: Of the 3 clients on the report, 2 of them had multiple risk factors.
 $2 \div 3 = 67\%$

Visit Count: The 2 clients with multiple risk factors received 10 visits during the report's date range.

Percent of Visits: Of the 15 visits on the report, 10 visits were delivered to clients with multiple risk factors.
 $10 \div 15 = 67\%$

	Risk Factors at Intake			
	Case Count	Percent of Clients	Visit Count	Percent of Visits
Single	1	33%	5	33%
Multiple	2	67%	10	67%
Unknown	0	0%	0	0%

	CaCoon Tier			
	Case Count	Percent of Cases	Visit Count	Percent of Visits
Tier 0	0	0%	0	0%
Tier 1	0	0%	0	0%
Tier 2	1	33%	5	33%
Tier 3	1	33%	9	60%
Tier 9	0	0%	0	0%
Unknown	1	33%	1	7%

Client Count: There was 1 client assigned to CaCoon Tier 3 at intake.

Percent of Clients: Of the 3 clients on the report, 1 was assigned to CaCoon Tier 3.
 $1 \div 3 = 33\%$

Visit Count: The 1 client assigned to CaCoon Tier 3 received 9 visits during the report's date range.

Percent of Visits: Of the 15 visits on this report, 9 visits were delivered to the client in CaCoon Tier 3.
 $9 \div 15 = 60\%$

CaCoon Client Population Summary

Agency: Deschutes CHD

Visits From: 1/1/1930 To: 12/31/1930

Total Clients: 3
 Total Cases: 3
 Total Visits: 15

	Number of Visits			
	Client Count	Percent of Clients	Visit Count	Percent of Visits
1-2 Visits	1	33%	1	7%
3-4 Visits	0	0%	0	0%
5-9 Visits	2	67%	14	93%
>9 Visits	0	0%	0	0%
Total	3	100%	15	100%

Client Count: Two clients received 5-9 visits.

Percent of Clients: Of the 3 clients on this report, 2 clients received 5-9 visits during the report's date range.
 $2 \div 3 = 67\%$

Visit Count: The 2 clients with 5-9 visits each during the report's date range received 14 visits.

Percent of Visits: Of the 15 visits on this report, 14 total visits were delivered to the clients with 5-9 visits.
 $14 \div 15 = 93\%$

CaCoon Client Population Summary

Agency: Deschutes CHD

Visits From: 1/1/1930 To: 12/31/1930

Total Clients: 3
Total Cases: 3
Total Visits: 15

Client Count: There was 1 client who was 8-11 months old at the most recent visit included on this report.

Percent of Clients: Of the 3 clients on this report, 1 client was 8-11 months old at the most recent visit.
 $1 \div 3 = 33\%$

	Age at Most Recent Visit	
	Client Count	Percent of Clients
0-3 months	2	67%
4-7 months	0	0%
8-11 months	1	33%
12-17 months	0	0%
18-23 months	0	0%
24-35 months	0	0%
36-47 months	0	0%
48-59 months	0	0%
5-12 years	0	0%
13-15 years	0	0%
16-17 years	0	0%
18-19 years	0	0%
20-24 years	0	0%
25-29 years	0	0%
30-34 years	0	0%
Over 35 years	0	0%
Unknown	0	0%
Total	3	100%

County Codes Report

The County Codes Report shows the county codes that have been recorded on visits within the date range. The “County Code” field is available on every visit in ORCHIDS, and users can save none, one, or multiple county codes on a single visit. Local program staff assigns county codes (01 through 20) to represent specific pieces of data for tracking purposes. Examples of data that local county agencies choose to track with county codes include specific interventions, special funding sources, whether DMAP denied or reimbursed the visit, and postpartum outcomes. Each agency has the option of defining its own set of county codes.

Most of this report consists of a table, where each row in the table represents a county code. The number of visits with each county code recorded is displayed. The percentage of total visits with each county code recorded is also displayed. At the top of the report the number of clients and visits are totaled.

Only information about clients with visits during the date range will appear on this report.

The following two pages show an example of a County Codes Report. The report displays first as it appears on the screen. A second version follows that contains descriptions of what each field on the report means.

MCM/MOP County Codes Report

Agency: Deschutes CHD
 Visits From: 1/14/1930 To: 12/22/1930

Total Clients: 6
 Total Visits: 42

MCM

Client Count: 4
 Visit Count: 29

MOP

Client Count: 3
 Visit Count: 13

	MCM		MOP		MCM & MOP	
	Visit Count	Percent of Visits	Visit Count	Percent of Visits	Visit Count	Percent of Visits
01	0	0%	4	31%	4	10%
02	1	3%	5	38%	6	14%
03	1	3%	3	23%	4	10%
04	7	24%	0	0%	7	17%
05	5	17%	0	0%	5	12%
06	1	3%	0	0%	1	2%
No County Code	14	48%	1	8%	15	36%

MCM/MOP County Codes Report

Agency: Deschutes CHD

Visits From: 1/14/1930 To: 12/22/1930

Total Clients: 6
Total Visits: 42

Total Clients: The deduplicated number of MCM and MOP clients that received visits during the date range. One client received both MCM and MOP visits, but is only counted once.
Total Visits: The number of visits that MCM and MOP clients received during the date range.

MCM
Client Count: 4
Visit Count: 29

Client Count: The number of MCM clients that received visits during the date range.
Visit Count: The number of visits that the MCM clients received during the date range.

MOP
Client Count: 3
Visit Count: 13

Client Count: The number of MOP clients that received visits during the date range.
Visit Count: The number of visits that the MOP clients received during the date range.

	MCM		MOP		MCM & MOP	
	Visit Count	Percent of Visits	Visit Count	Percent of Visits	Visit Count	Percent of Visits
01	0	0%	4	31%	4	10%
02	1	3%	5	38%	6	14%
03	1	3%	3	23%	4	10%
04	7	24%	0	0%	7	17%
05	5	17%	0	0%	5	12%
06	1	3%	0	0%	1	2%
No County Code	14	48%	1	8%	15	36%

Visit Count:
There were 14 MCM visits with no county codes recorded on them.

Percent of Visits:
Of the total 29 MCM visits, 14 visits had no county codes recorded on them.
 $14 \div 29 = 48\%$

Visit Count:
There were 5 MOP visits with County Code 02 recorded on them.

Percent of Visits:
Of the total 13 MOP visits, 5 visits had County Code 02 recorded on them.
 $5 \div 13 = 38\%$

Numbers and percents represent MCM and MOP visits combined.

Report reflects all data entry completed as of the previous day.

Report Created On: 12/28/2010 Page 1 of 1

Failed Visit Report

There is a failed visit report available for Babies First and CaCoon clients.¹ These two reports show scheduled visits with Babies First or CaCoon clients that failed to occur. These are sometimes referred to as “no show” visits or “not at home” visits.

Any visit within the report’s date range that has the selection “8 - CLIENT NOT HOME / FAILED VISIT” saved in the “Location” field on Visit Tab 3 will show up on this report.

Failed visits remain in the database and may be viewed onscreen, but they are not included on any ORCHIDS Crystal Report except a Failed Visit Report. If a visit shows up on this report in error, that is, the visit actually did occur, then data entry should be corrected. Deleting the selection “8 - CLIENT NOT HOME / FAILED VISIT” from the “Location” field on Visit Tab 3 will cause the visit to disappear from the Failed Visit Report and to appear on the other reports that reflect actual service delivery to clients. (Remember that changes in the database normally show up the following day on your reports.)

Some agencies do not record their failed visits. Failed Visit Reports will be blank for these agencies.

The following two pages show an example of a CaCoon Failed Visit Report. The first version shows the report as it appears onscreen. The second version contains descriptions of what each field on the report means. The Babies First Failed Visit Report and the CaCoon Failed Visit Report contain identical fields.

¹ FamilyNet ORCHIDS does not collect failed visits for MCM or MOP clients.

CaCoon Failed Visits

Agency: Deschutes CHD
Visits From: 6/30/1930 To: 11/11/1930
Staff: Nurse, HomeVisiting

Clients: 2

Failed Visits: 4

Client	State ID	Local ID	Visit Date	Visit Time
CaCoon, Client1 Date of Birth: 3/23/1930	3538430	25844237	11/11/1930	30 Minutes
CaCoon, Client1 Date of Birth: 3/23/1930	3538430	25844237	7/15/1930	1 Hour
CaCoon, Client3 Date of Birth: 5/11/1930	3538432	9355562	8/31/1930	1 Hour 45 Minutes
CaCoon, Client3 Date of Birth: 5/11/1930	3538432	9355562	6/30/1930	45 Minutes

CaCoon Failed Visits

Agency: Deschutes CHD
 Visits From: 6/30/1930 To: 11/11/1930
 Staff: Nurse, HomeVisiting

Clients: 2
Failed Visits: 4

During the date range of this report, this nurse recorded 4 failed visits for 2 clients. The visits were entered into FamilyNet ORCHIDS with Location "8" on Visit Tab 3.

Client	State ID	Local ID	Visit Date	Visit Time
CaCoon, Client1 Date of Birth: 3/23/1930	3538430	25844237	11/11/1930	30 Minutes
CaCoon, Client1 Date of Birth: 3/23/1930	3538430	25844237	7/15/1930	1 Hour
CaCoon, Client3 Date of Birth: 5/11/1930	3538432	9355562	8/31/1930	1 Hour 45 Minutes
CaCoon, Client3 Date of Birth: 5/11/1930	3538432	9355562	6/30/1930	45 Minutes

The state ID number is the unique identifier for the client in FamilyNet ORCHIDS.

The local ID number is the unique identifier for the client in a database maintained by the local agency.

This is the date of the scheduled visit that did not occur.

The amount of time the nurse recorded for the visit. Local agencies follow different policies regarding the use of this field. For example, some agencies do not use this field at all. Many agencies use this field for actual visits that occurred and for failed visits. In some agencies driving time is included in the time recorded in this field.

Report created on: 3/7/2012

Report reflects all data entry completed as of the previous day.

Initial Risk Report

The Initial Risk Report totals the number and percentage of cases for clients that presented with specific risk factors. The report also totals the number and percentage of cases for clients that presented with multiple risk factors at intake, and the number and percentage of cases that have no recorded risk factors.

Only information about clients that had visit dates during the date range will appear on this report.

The following two pages show an example of an Initial Risk Report. The first version shows the report as it appears on a screen. The second version contains descriptions of what each field on the report means.

CaCoon Initial Risk Report

Agency: Deschutes CHD

Visits From: 1/15/1931 To: 12/15/1933

Total Clients: 3

Total Cases: 3

Total Visits: 16

Risk Factor	Client Count	Percent of Clients	Case Count	Percent of Cases	Visit Count	Percent of Visits
B3 - NEUROMOTOR DISORDERS INCLUDING CEREBRAL PALSY & BRACHIAL NERVE PALSY	1	33%	1	33%	3	19%
B16 - INTRAVENTRICULAR HEMORRHAGE (GRADE III, IV) OR CYSTIC PERIVENTRICULAR LEUKOMALACIA (PVL) OR CHRONIC SUBDURALS	1	33%	1	33%	5	31%
B17 - PERINATAL ASPHYXIA ACCOMPANIED BY SEIZURES	1	33%	1	33%	5	31%
B22 - DEVELOPMENTAL DELAY	1	33%	1	33%	8	50%
B23 - TRAUMATIC BRAIN INJURY	1	33%	1	33%	3	19%
A10 - NEONATAL HYPERBILIRUBINEMIA	1	33%	1	33%	8	50%
A21 - PARENTAL ALCOHOL OR SUBSTANCE ABUSE	1	33%	1	33%	8	50%
A23 - CONCERN OF PARENT/PROVIDER	1	33%	1	33%	8	50%
A24 - PREMATUREITY	1	33%	1	33%	5	31%
A35 - PARENT WITH INADEQUATE KNOWLEDGE AND SUPPORTS	1	33%	1	33%	8	50%

CaCoon Initial Risk Report

Agency: Deschutes CHD

Visits From: 1/15/1931 To: 12/15/1933

Total Clients: 3
Total Cases: 3
Total Visits: 16

Total Clients: This report includes data about 3 CaCoon clients.
Total Cases: The 3 clients included in the report were enrolled in 3 cases.
Total Visits: The 3 clients received 16 visits during the date range of this report.

Risk Factor	Client Count	Percent of Clients	Case Count	Percent of Cases	Visit Count	Percent of Visits
B3 - NEUROMOTOR DISORDERS INCLUDING CEREBRAL PALSY & BRACHIAL NERVE PALSY	1	33%	1	33%	3	19%
B16 - INTRAVENTRICULAR HEMORRHAGE (GRADE III, IV) OR CYSTIC PERIVENTRICULAR LEUKOMALACIA (PVL) OR CHRONIC SUBDURALS	1	33%	1	33%	5	31%
B17 - PERINATAL ASPHYXIA ACCOMPANIED BY SEIZURES	1	33%	1	33%	5	31%
B22 - DEVELOPMENTAL DELAY	1	33%	1	33%	8	50%
B23 - TRAUMATIC BRAIN INJURY	1	33%	1	33%	3	19%
A10 - NEONATAL HYPERBILIRUBINEMIA	1	33%	1	33%	8	50%
A21 - PARENTAL ALCOHOL OR SUBSTANCE ABUSE	1	33%	1	33%	8	50%
A23 - CONCERN OF PARENT/PROVIDER	1	33%	1	33%	8	50%
A24 - PREMATURITY	1	33%	1	33%	5	31%
A35 - PARENT WITH INADEQUATE KNOWLEDGE AND SUPPORTS	1	33%	1	33%	8	50%

Client Count:
There was 1 client who received visits during the report's date range that had the risk factor "B3" recorded on his/her case.

Percent of Clients:
Of the total 3 CaCoon clients included on this report, 1 client had the "B3" risk factor.
 $1 \div 3 = 33\%$

Case Count:
The 1 client with risk factor "B3" recorded on his/her case was enrolled in 1 CaCoon case during the report's date range.

Percent of Clients:
Of the total 3 CaCoon cases, one case involved a client with risk factor "B3."
 $1 \div 3 = 33\%$

Visit Count:
The 1 client with risk factor "B3" recorded on his/her case received 3 visits during the report's date range.

Percent of Visits:
Of the total 16 CaCoon visits included in the report, 3 visits were delivered to clients with the "B3" risk factor.
 $3 \div 16 = 19\%$

Report reflects all data entry completed as of the previous day.

Report Created On: 12/29/2010 Page 1 of 1

IOI (Issues/Outcomes/Interventions) Report

The IOI Report displays data about the issues, outcomes, and interventions that were recorded for visits. Every visit in ORCHIDS has a set of IOI fields onscreen.

Only information about visits that occurred during the date range will appear on this report. Any issues, outcomes, or interventions with no reported data will not appear on the report. You may run the IOI Report for the entire agency or you may run the IOI_Staff Report with the data grouped by home visitor.

The following two pages show an example of one page of an IOI Report. The first version shows the report as it appears on a screen. The second version contains descriptions of what each field on the report means.

Babies First! Issues/Outcomes/Interventions Summary

Agency: Deschutes CHD
Visits From: 1/1/1930 To: 12/31/1934

Total Clients: 4

Total Visits: 16

Issues	Outcomes	Interventions	Client Count	Percent of Clients	Visit Count	Percent of Visits
Basic Needs			1	25%	1	6.3%
	Met		1	25%	1	6.3%
		Case Management	1	25.0%	1	6.3%
Nutrition			4	100%	16	100.0%
	Less than body requirements		1	25%	1	6.3%
		Breastfeeding Assistance	1	25.0%	1	6.3%
	Meets body requirements		3	75%	14	87.5%
		Breastfeeding Assistance	1	25.0%	3	18.8%
		Case Management	2	50.0%	6	37.5%
		Individual Teaching	3	75.0%	7	43.8%
		Nutritional Monitoring	2	50.0%	4	25.0%
	More than body requirements		1	25%	1	6.3%
		Individual Teaching	1	25.0%	1	6.3%
		Nutritional Monitoring	1	25.0%	1	6.3%
Nutrition Issues			3	75%	3	18.8%
	Actual nutrition issues		1	25%	1	6.3%
		Breastfeeding Assistance	1	25.0%	1	6.3%
		Infant Cues	1	25.0%	1	6.3%
		Nutrition Care Plan	1	25.0%	1	6.3%
	No nutrition issues		2	50%	2	12.5%
Injury			4	100%	8	50.0%
	At risk for injury		1	25%	1	6.3%
		Case Management	1	25.0%	1	6.3%
		Individual Teaching	1	25.0%	1	6.3%
		Safety Checklist	1	25.0%	1	6.3%
	Not at risk for injury		4	100%	7	43.8%
		Case Management	1	25.0%	1	6.3%
		Individual Teaching	3	75.0%	3	18.8%
		Safe Sleep	3	75.0%	3	18.8%
		Safety Checklist	2	50.0%	2	12.5%
Parenting			4	100%	13	81.3%
	At risk for impaired attachment		1	25%	1	6.3%
		Individual Teaching	1	25.0%	1	6.3%
	Readiness for enhanced parenting		3	75%	12	75.0%
		Attachment Promotion	2	50.0%	2	12.5%
		Case Management	1	25.0%	6	37.5%
		Individual Teaching	2	50.0%	6	37.5%
Child Development			4	100%	16	100.0%
	Appropriate development progression for condition		1	25%	1	6.3%
	At risk for delayed development		3	75%	6	37.5%
		ASQ	2	50.0%	3	18.8%
		Case Management	1	25.0%	3	18.8%
		Developmental Enhancement	3	75.0%	3	18.8%
		Hearing	3	75.0%	4	25.0%
		IMS	1	25.0%	1	6.3%
		Individual Teaching	2	50.0%	4	25.0%

Babies First! Issues/Outcomes/Interventions Summary

Agency: Deschutes CHD
Visits From: 1/1/1930 To: 12/31/1934

Total Clients: There are 4 clients included on this report.
Total Visits: The 4 clients on this report received 16 visits during the date range.

Total Clients: 4
Total Visits: 16

Issues	Outcomes	Interventions	Client Count	Percent of Clients	Visit Count	Percent of Visits
Basic Needs			1	25%	1	6.3%
	Met		1	25%	1	6.3%
		Case Management	1	25.0%	1	6.3%
Nutrition			4	100%	16	100.0%
	Less than body requirements		1	25%	1	6.3%
		Breastfeeding Assistance	1	25.0%	1	6.3%
	Meets body requirements		3	75%	14	87.5%
		Breastfeeding Assistance	1	25.0%	3	18.8%
		Case Management	1	50.0%	6	37.5%
		Individual Teaching	1	75.0%	7	43.8%
		Nutrition	1	50.0%	4	25.0%
	More than body requirements		1	25%	1	6.3%
		Individual Teaching	1	25.0%	1	6.3%
		Nutrition	1	25.0%	1	6.3%
Nutrition Issues			8	75%	3	18.8%
	Actual nutrition issues		8	25%	1	6.3%
		Breastfeeding Assistance	1	25.0%	1	6.3%
		Infant Care	1	25.0%	1	6.3%
		Nutrition	1	25.0%	1	6.3%
	No nutrition issues		8	50%	2	12.5%
Injury			4	100%	8	50.0%
	At risk for injury		1	25%	1	6.3%
		Case Management	1	25.0%	1	6.3%
		Individual Teaching	1	25.0%	1	6.3%
		Safety Checklist	1	25.0%	1	6.3%
	Not at risk for injury		4	100%	7	43.8%
		Case Management	1	25.0%	1	6.3%
		Individual Teaching	3	75.0%	3	18.8%
		Safe Sleep	3	75.0%	3	18.8%
		Safety Checklist	2	50.0%	2	12.5%
			4	100%	13	81.3%
			1	25%	1	6.3%
			1	25.0%	1	6.3%
			3	75%	12	75.0%
			2	50.0%	2	12.5%
			1	25.0%	6	37.5%
			2	50.0%	6	37.5%
			4	100%	16	100.0%
			1	25%	1	6.3%
			3	75%	6	37.5%
			2	50.0%	3	18.8%
			1	25.0%	3	18.8%
			3	75.0%	3	18.8%
			3	75.0%	4	25.0%
			1			
			2			

Client Count: There were 4 clients assessed for potential injury during the report's date range.

Percent of Clients: Of the total 4 clients included on this report, 4 were assessed for potential injury.
 $4 \div 4 = 100\%$

Visit Count: Potential for injury was assessed on 8 separate visits during the report's date range.

Percent of Visits: Of the total 16 visits included in the report, 8 visits included injury assessment.
 $8 \div 16 = 50\%$

Client Count: There was 1 client assessed as being at risk for injury during the report's date range.

Percent of Clients: Of the total 4 clients assessed for potential injury, 1 client was assessed as being at risk for injury.
 $1 \div 4 = 25\%$

Visit Count: Being at risk for injury was recorded on 1 visit during the report's date range.

Percent of Visits: Of the total 16 visits included in the report, being at risk for injury was recorded on 1 visit.
 $1 \div 16 = 6.3\%$

The interventions "Case Management," "Individual Teaching," and "Safety Checklist" were all recorded on the 1 visit where being at risk for injury was recorded.

Report reflects all data entry completed as of the previous day.

Referrals In Report

This report summarizes the agencies and programs that referred clients into Babies First, CaCoon, Maternity Case Management, and Maternity–Other Program. It shows combined program counts and percentages and individual program counts and percentages.

Only information about clients with visit dates during the date range will appear on this report.

The following two pages show examples of the Referrals In report. The first version shows one page of the report as it appears on the screen. The second version is the same page annotated with descriptions of what each field on the report means.

MCM/MOP Referrals In

Agency: Deschutes CHD
Visits From: 1/1/1930 To: 12/31/1930

Total Clients: 6
Total Visits: 42
Total Referrals: 7

Referral Source	Referral Count	Percent of Referrals
Primary Health Care Provider	0	0.00%
Public Health Nurse (PHN)	0	0.00%
Public Transportation	0	0.00%
Regional Program (Department of Education)	0	0.00%
Relief Nursery	0	0.00%
Respite Care	0	0.00%
SafeNet	0	0.00%
School-Based Health Center	0	0.00%
Section 8 HUD Housing	0	0.00%
Self	2	28.57%
Shelter	0	0.00%
Smoking/Tobacco Cessation	0	0.00%
Speech	0	0.00%
SSI (Social Security Income)	0	0.00%
State EHDI Program	0	0.00%
STD Counseling/Testing/Treatment	0	0.00%
Substance Abuse Treatment Agency	0	0.00%
Support Group	0	0.00%
TANF (Temporary Assistance to Needy Families)	0	0.00%
Teen Parent Outreach	0	0.00%
Teen Parent School	0	0.00%
Tertiary Care/Specialty Clinic	0	0.00%
Vision	0	0.00%
Volunteer/Mentor	0	0.00%
Well Child Care	0	0.00%
WIC	2	28.57%
Young Parent Program	0	0.00%

MCM/MOP Referrals In

Agency: Deschutes CHD

Visits From: 1/1/1930 To: 12/31/1930

Total Clients: 6
Total Visits: 42
Total Referrals: 7

Total Clients: The report includes data about 6 clients.
Total Visits: The 6 clients received 42 visits during the date range of this report.
Total Referrals: The 6 clients were referred to the health department 7 times. One client was referred in twice.

Referral Source	Referral Count	Percent of Referrals
Primary Health Care Provider	0	0.00%
Public Health Nurse (PHN)	0	0.00%
Public Transportation	0	0.00%
Regional Program (Department of Education)	0	0.00%
Relief Nursery	0	0.00%
Respite Care	0	0.00%
SafeNet	0	0.00%
School-Based Health Center	0	0.00%
Section 8 HUD Housing	0	0.00%
Self	2	28.57%
Shelter	0	0.00%
Smoking/Tobacco Cessation	0	0.00%
Speech	0	0.00%
SSI (Social Security Income)	0	0.00%
State EHDI Program	0	0.00%
STD Counseling/Testing/Treatment	0	0.00%
Substance Abuse Treatment Agency	0	0.00%
Support Group	0	0.00%
TANF (Temporary Assistance to Needy Families)	0	0.00%
Teen Parent Outreach	0	0.00%
Teen Parent School	0	0.00%
Tertiary Care/Specialty Clinic	0	0.00%
Vision	0	0.00%
Volunteer/Mentor	0	0.00%
Well Child Care	0	0.00%
WIC	2	28.57%
Young Parent Program	0	0.00%

Number of Referrals: Of the 7 referrals received for these 6 clients, 2 were self-referrals..
Percent of Referrals: Of the 7 referrals included in this report, 2 of the 7 referrals were self-referrals.
 $2 \div 7 = 28.57\%$

Number of Referrals: Of the 7 referrals received for these 6 clients, 2 were from WIC.
Percent of Referrals: Of the 7 referrals included in this report, 2 of the 7 referrals were from WIC.
 $2 \div 7 = 28.57\%$

Referrals Out Report

The Referrals Out Report summarizes data about the types of agencies and services where staff referred Babies First and CaCoon clients for additional services. It displays counts and percentages of referrals out of the Babies First! and CaCoon programs, and displays counts and percentages of clients who either began receiving the referral service or who were not eligible for the referral service.

Only information about clients with visit dates during the date range will appear on this report.

The following two pages show two versions of the same Referrals Out report. One version shows how the report appears on the screen. The second version contains descriptions about what each field on the report means.

Babies First! Referrals Out and Follow-Up Summary

Agency: Deschutes CHD
Visits From: 1/1/1930 To: 6/30/1931

Total Clients: 4
Total Visits: 16

Referral	Referrals Out				Referrals Follow-Up			
	Client Count	Percent of Clients	Visit Count	Percent of Visits	Getting Services		Not Eligible	
					Client Count	Percent of Clients	Client Count	Percent of Clients
Birth Certificates (In-State)	1	25.0%	2	12.5%	1	100.0%	0	0.0%
Immunization	3	75.0%	8	50.0%	3	100.0%	0	0.0%
Lactation Consultant	1	25.0%	1	6.3%	1	100.0%	0	0.0%
Medicaid	1	25.0%	3	18.8%	1	100.0%	0	0.0%
Medicaid Transportation	1	25.0%	2	12.5%	0	0.0%	0	0.0%
Other Referral Not Specified	1	25.0%	1	6.3%	0	0.0%	0	0.0%
Primary Health Care Provider	2	50.0%	3	18.8%	1	50.0%	0	0.0%
Relief Nursery	1	25.0%	2	12.5%	0	0.0%	0	0.0%
SSI (Social Security Income)	1	25.0%	1	6.3%	0	0.0%	0	0.0%
Section 8 HUD Housing	1	25.0%	1	6.3%	0	0.0%	0	0.0%
TANF (Temporary Assistance to Needy Families)	1	25.0%	1	6.3%	1	100.0%	0	0.0%
Vision	1	25.0%	1	6.3%	0	0.0%	0	0.0%
WIC Program	2	50.0%	4	25.0%	2	100.0%	0	0.0%
Well Child Care	1	25.0%	5	31.3%	1	100.0%	0	0.0%

Report Created On: 1/5/2011 Page 1 of 1

Babies First! Referrals Out and Follow-Up Summary

Agency: Deschutes CHD
Visits From: 1/1/1930 To: 6/30/1931

Total Clients: 4
Total Visits: 16

Total Clients: This report includes data about 4 clients.

Total Visits: The 4 clients received 16 visits during the date range of the report.

Referral

Birth Certificates (In-State)

Immunization

Lactation Consultant

Medicaid

Medicaid Transportation

Other Referral Not Specified

Primary Health Care Provider

Relief Nursery

SSI (Social Security Income)

Section 8 HUD Housing

TANF (Temporary Assistance to Needy Families)

Vision

WIC Program

Well Child Care

Referral	Referrals Out				Referrals Follow-Up			
	Client Count	Percent of Clients	Visit Count	Percent of Visits	Getting Services		Not Eligible	
					Client Count	Percent of Clients	Client Count	Percent of Clients
Birth Certificates (In-State)	1	25.0%	2	12.5%	1	100.0%	0	0.0%
Immunization	3	75.0%	8	50.0%	3	100.0%	0	0.0%
Lactation Consultant	1	25.0%	1	6.3%	1	100.0%	0	0.0%
Medicaid	1	25.0%	3	18.8%	1	100.0%	0	0.0%
Medicaid Transportation	1	25.0%	2	12.5%	0	0.0%	0	0.0%
Other Referral Not Specified	1	25.0%	1	6.3%	0	0.0%	0	0.0%
Primary Health Care Provider	2	50.0%	3	18.8%	1	50.0%	0	0.0%
Relief Nursery	1	25.0%	2	12.5%	0	0.0%	0	0.0%
SSI (Social Security Income)	1	25.0%	1	6.3%	0	0.0%	0	0.0%
Section 8 HUD Housing	1	25.0%	1	6.3%	0	0.0%	0	0.0%
TANF (Temporary Assistance to Needy Families)	1	25.0%	1	6.3%	1	100.0%	0	0.0%
Vision	1	25.0%	1	6.3%	0	0.0%	0	0.0%
WIC Program	2	50.0%	4	25.0%	2	100.0%	0	0.0%
Well Child Care	1	25.0%	5	31.3%	1	100.0%	0	0.0%

Referrals Out

Client Count: There were 3 clients on this report referred for immunization. Percent of Clients: Of the 4 clients on this report, 3 were referred for immunization.
 $3 \div 4 = 75\%$

Visit Count: The 3 clients referred for immunization were referred on 8 visits, that is, they were referred out 8 times for immunization. Percent of Visits: Of the 16 visits included on this report, 8 of the visits included referral for immunization.
 $8 \div 16 = 50\%$

Referral Follow-Up: Getting Services

Client Count: There were 3 referred clients with recorded follow-up that indicated they had received immunization services. Percent of Clients: Of the 3 clients referred for immunization, 3 received immunization services.
 $3 \div 3 = 100\%$

Referrals Follow-Up: Not Eligible

Client Count: There were 0 referred clients with recorded follow-up that indicated they were found ineligible for immunization. Percent of Clients: Of the 4 clients on this report, 3 were referred for immunization.
 $0 \div 3 = 0\%$

Report reflects all data entry completed as of the previous day.

Report Created On: 1/5/2011 Page 1 of 1

Summary Report (Client Counts and Visits)

The Summary Report (Client Counts and Visits) summarizes the number of clients and visits for each month during the report's date range. It also totals the number of clients, cases, and visits included in the report.

Only information about clients with visit dates during the date range will appear on this report. Keep in mind that the counts for a month may be misleading if you use a start date that doesn't occur at the start of a month or an end date that doesn't occur at the end of a month.

The following two pages show an example of a Summary Report. The first version is simply the report. The second version is annotated with descriptions of what each field on the report means.

MCM-MOP Client Counts and Visits

Agency: Deschutes CHD
Visits From: 1/14/1930 To: 12/22/1930

Month	Client Count	Case Count	Visit Count
January 1930	1	1	1
February 1930	1	1	3
March 1930	2	2	3
April 1930	3	3	5
May 1930	5	5	8
June 1930	4	4	4
July 1930	4	4	6
August 1930	3	3	3
September 1930	3	3	5
October 1930	1	1	1
November 1930	1	1	1
December 1930	1	1	2
Total Clients	6	7	42

MCM-MOP Client Counts and Visits

Agency: Deschutes CHD

Visits From: 1/14/1930 To: 12/22/1930

Client Count:
There were 5 clients that received MCM and MOP services during May of 1930.

Month	Client Count	Case Count	Visit Count
January 1930	1	1	1
February 1930	1	1	3
March 1930	2	2	3
April 1930	3	3	5
May 1930	5	5	8
June 1930	4	4	4
July 1930	4	4	6
August 1930	3	3	3
September 1930	3	3	5
October 1930	1	1	1
November 1930	1	1	1
December 1930	1	1	2

Case Count:
Of the 5 clients that received MCM and MOP services during May of 1930, each was enrolled in one case.

Visit Count:
There were 5 clients that received 8 MCM and MOP visits during May of 1930.

Total Clients	6	7	42
----------------------	----------	----------	-----------

Total Client Count:
There were 6 clients that received MCM and MOP services during the date range of the report.

Total Case Count:
The 6 clients that received MCM and MOP services were enrolled in 7 cases during the date range of the report. One client was enrolled in both an MCM and a MOP case.

Total Visit Count:
The 6 clients received 42 visits during the date range of the report.

Report reflects all data entry completed as of the previous day.

Report Created On: 12/28/2010 Page 1 of 1

Tickler Report

The Tickler Report was developed to aid staff in scheduling client visits. Active clients appear on this report, along with all of their visit dates and some key information. Clients whose cases have closed (i.e., have been discharged) do not appear on this report.

The Tickler Report varies slightly by program, although the Babies First and CaCoon reports are nearly identical. They both group clients by home visitor, and then show each client's name and date of birth, state ID, local ID, and weeks of gestation at birth. Each visit date is listed by client. Next to each visit date, the report displays the client's age (or corrected age) on the day of the visit, any screening and measurement recorded at the visit, and the date the home visitor expected to see the client again (estimated next visit date). The CaCoon Tickler Report also includes the Tier Level assigned to the client. A client will remain on this report until the client's case closes in ORCHIDS.

The MCM/MOP Tickler Report includes the client's name and date of birth, state ID, local ID, estimated due date, and actual delivery date. Each visit date is listed. Next to each visit date, the report also displays the client's age on the day of the visit and the date the home visitor expected to see the client again. The report can be run on MCM or MOP clients alone, or with the MCM and MOP clients combined. A client will remain on this report until the client's case closes in ORCHIDS.

The following four pages show a CaCoon Tickler Report and an MCM/MOP Tickler Report. Each report displays on one page, and then displays again on a second page with descriptions of what each field on the report means.

CaCoon Tickler Report

Agency: Deschutes CHD
Staff: Nurse, HomeVisiting

Total Clients: 3

Name	State ID Local ID	Tier Level	Date of Birth & Weeks Gestation	Visit Date	Age or Corrected Age**	Screening & Measurement	Est. Next Visit Date
CaCoon, Client1	3538430 12-584729	3	3/23/1930 30	12/15/1930	6 Months**		12/31/1930
				11/11/1930	5 Months**		
				10/1/1930	4 Months**	ASQ	10/15/1930
				9/11/1930	3 Months**	Hearing	
				9/1/1930	3 Months**	Length: 24 inches Weight: 11 lbs Head Circ: 40 cm	
				8/1/1930	2 Months**	Hearing	8/31/1930

Report Created On: 3/1/2012 Page 1 of 4

CaCoon Tickler Report

Agency: Deschutes CHD
Staff: Nurse, HomeVisiting

Total Clients: 3

This report contains data about 3 clients. These are the active CaCoon clients on this nurse's caseload.

This column always shows the client's date of birth. Beneath the date of birth, the client's gestational age at birth will also be displayed if the age was entered into FamilyNet ORCHIDS.

The home visitor recorded that she expected to see the client again around 12/31/1930.

Name	State ID Local ID	Tier Level	Date of Birth & Weeks Gestation	Visit Date	Age or Corrected Age**	Screening & Measurement	Est. Next Visit Date
CaCoon, Client1	3538430 12-584729	3	3/23/1930 30	12/15/1930	6 Months**		12/31/1930
				11/11/1930	5 Months**		
				10/1/1930	4 Months**	ASQ	10/15/1930
				9/11/1930	3 Months**	Hearing	
				9/1/1930	3 Months**	Length: 24 inches Weight: 11 lbs Head Circ: 40 cm	
				8/1/1930	2 Months**	Hearing	8/31/1930

This column always shows the state ID number, which is the unique identifier for the client in FamilyNet ORCHIDS. It will also show a local ID number when one has been recorded in FamilyNet ORCHIDS. The local ID number is the unique identifier for the client in a database maintained by the local agency.

The nurse case manager assigned CaCoon Tier 3 to the family, which indicates a high need for care coordination.

The home visitor administered the Ages & Stages questionnaire on 10/1/1930. The client had a corrected age of 4 months on this visit date.

On the 9/1/1930 visit, this premature client had a corrected age of 3 months. The two asterisks that appear after the age indicate a corrected age. A chronological age displays without asterisks. The home visitor recorded the client's length, weight, and head circumference, which are all displayed to the right of the visit date.

This report reflects all data entry completed as of the previous day.

Report Created On: 3/1/2012 Page 1 of 4

MCM/MOP Tickler Report

Agency: Deschutes CHD

Staff: Nurse, HomeVisiting

Total Clients: 3

Name	Date of Birth	State ID	Local ID	Case	Est. Due Date	Actual Date of Delivery	Visit Date	Age	Est. Next Visit Date
Client_1, Mary MCM	1/1/1913	3538438		MCM	8/31/1930	8/8/1930	9/1/1930	17 Years	9/5/1930
							8/12/1930	17 Years	8/20/1930
							8/9/1930	17 Years	8/11/1930
							8/6/1930	17 Years	8/15/1930
							7/29/1930	17 Years	8/5/1930
							7/22/1930	17 Years	7/31/1930
							7/16/1930	17 Years	7/21/1930
Client_2, Marion MCM	9/3/1900	3538439		MCM	10/1/1930	4/5/1930	4/8/1930	29 Years	4/15/1930
							3/3/1930	29 Years	4/3/1930
							2/3/1930	29 Years	3/1/1930
Client_3, Mariah MOP	3/23/1910	3538440		MOP	5/15/1930	4/28/1930	5/15/1930	20 Years	

Report Created: 3/6/2012 Page 1 of 1

MCM/MOP Tickler Report

Agency: Deschutes CHD
Staff: Nurse, HomeVisiting

Each of this client's visit dates is listed, starting with the most recent one. To the right of each visit date is the client's age when the visit occurred and when the nurse expected to see the client again.

Total Clients: 3

This report shows data about 3 clients.

Name	Date of Birth	State ID	Local ID	Case	Est. Due Date	Actual Date of Delivery	Visit Date	Age	Est. Next Visit Date
Client_1, Mary MCM	1/1/1913	3538438		MCM	8/31/1930	8/8/1930	9/1/1930	17 Years	9/5/1930
							8/12/1930	17 Years	8/20/1930
							8/9/1930	17 Years	8/11/1930
							8/6/1930	17 Years	8/15/1930
							7/29/1930	17 Years	8/5/1930
							7/22/1930	17 Years	7/31/1930
							7/16/1930	17 Years	7/21/1930
Client_2, Marion MCM	9/3/1900	3538439		MCM	10/1/1930	4/5/1930	4/8/1930	29 Years	4/15/1930
							3/3/1930	29 Years	4/3/1930
							2/3/1930	29 Years	3/1/1930
Client_3, Mariah MOP	3/23/1910	3538440		MOP	5/15/1930	4/28/1930	5/15/1930	20 Years	

The estimated due date and the baby's date of birth will be blank when no data entry has occurred in these fields.

This is an MCM client.

This is a MOP client, not an MCM client.

These columns always show the client's date of birth and state ID number. The state ID number is the unique identifier for the client in FamilyNet ORCHIDS.

No local ID displays for any of the 3 clients. A local ID number is the unique identifier for the client in a database maintained by the local agency.

An estimated next visit date was not recorded in FamilyNet ORCHIDS, so this field is blank.

This report reflects all data entry completed as of the previous day.