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| Child Development Information System open, change and close process |
| Victorian Maternal and Child Health (MCH) Child Development Information System (CDIS)  December 2020 |

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# What is an open client record?

‘Open for Universal Service’ means being active or receiving a maternal and child health (MCH) service (this was previously called ‘enrolled’).

**Only** data from children under six years old is counted for reporting purposes – except EMCH where the referral is counted from the primary caregiver.

**Note:** Only open client records can be counted for recording.

# Which client records should be open?

* **All** children under six years old
* **All** Primary Caregivers
* Anyone who is actively receiving an MCH service – then close the record when the ‘episode of care or service’ is finished. For example, a caregiver’s record would be open if they have been referred by MCH (which is recorded from the child’s record then notes entered in the caregiver’s record) until the referral has been followed-up and no further service is required. Then the caregiver’s record would be closed.

**Note**: primary caregivers’ records **always** remain open.

# When to close a record

As the Victorian Maternal and Child Health Service is currently funded on **total number of infant record cards**, client records remain open until one of the close reasons is met. Notes must be added to the client record before closing for any reason.

Reasons to close include:

* client has moved interstate
* client has moved overseas
* client has declined service
* client is receiving services from another care provider
* change in primary caregiver status
* no longer receiving MCH service
* stillbirth
* client is deceased
* primary caregiver of stillborn or deceased child
* data entry error.

# How to check if client records are open or closed

The **only** reliable way to determine if client records are open or closed is to go to ‘Open/Change/Close Client’ screen.

To open this screen, go to ‘Client details’ and select ‘Open/Change/Close Client’.

**Note:** As a part of data cleansing, check every client as they attend an appointment. Also check the records of children under six years old and primary caregivers who have been transferred in or merged.

# How to open a client

1. ‘Client Details’
2. ‘Open/Change/Close Client’
3. Select ‘Update’ button
4. In ‘Open Change Close’ pop up box, if ‘Closed – Open’ is selected by default (only option):

* Site (required): Select from look-up list or type first 3 letters of site and choose
* Reason (required): Select from look-up list (Currently receiving MCH service, Re-establish MCH service, , Change in primary caregiver status, Other – see notes for details, Data entry error)
* If the client record is for the client as a child and the child is now the adult primary care giver or caregiver this record cannot be used, and a new record must be commenced. The client record as a child is to be closed with the reason Childhood Record. A note is to be added to the Edit field on the summary page of the client record. The note should read “DO NOT USE CHILDHOOD RECORD”

1. Select ‘Save’.

**Note:** Once **open**, a client will be displayed in the ‘Active Universal List’ – **except** where a client is open and ‘Birth Notification Received’ was selected (on initial ‘Create Client/Contact’ screen). In this case, they will be displayed on the ‘Birth Notification List’ **until** the ‘Offer of a home visit’ via the Birth Notification List screen is attended

# How to change a client record between sites within your Council

1. ‘Client Details’
2. ‘Open/Change/Close Client’
3. Select ‘Update’ button
4. In the ‘Open Change Close’ pop up box, if ‘Open – Change’ is selected by default:

* Site (required): Select from look-up list or type first 3 letters of site and choose

1. Select ‘Save.

**Note:** The client’s ‘site’ will be displayed on the ‘Client Summary’ page; however, the **only** reliable way to identify if a client record is **open** and a site assigned is via ‘Open/Change/Close Client’.

# How to close a client

1. ‘Client Details’
2. ‘Open/Change/Close Client’
3. Select ‘Update’ button
4. In the ‘Open Change Close’ pop up box, if ‘Open – Change’ is selected by default:

* Close: Select radio button to choose
* Reason: Select from look-up
* Add note to the record explaining in more detail why the client record is being closed.

1. Select ‘Save’.

Reasons for closing in the look-up:

* Client has moved interstate
* Client has moved overseas
* Client has declined service
* Client is receiving services from another care provider
* Change in primary caregiver status
* No longer receiving MCH service
* Stillbirth
* Client is deceased
* Primary caregiver of stillborn or deceased child
* Data entry error

**Note:** Once closed, the client will be removed from the ‘Universal Active List’, ‘Programs Active List’, groups and waitlists.

## Close a client with incomplete or pending assessments

**Note:** If ‘Incomplete/pending assessments...’ are identified on closing a client record, complete any incomplete consultations before closing the client record.

1. ‘Clinical Activity’
2. ‘Consultations’
3. ‘Booked appointments and Notes Pending’: Future appointments in calendar that have not been opened will be cancelled in calendar on **closing**
4. Incomplete consultations: Select ‘Continue’ button next to relevant incomplete consultation date and complete consultation
5. Select ‘Save’
6. Select ‘OK’ – ‘Successfully saved’
7. Repeat for remaining incomplete consultations
8. ‘Client Details’
9. ‘Open/Change/Close Client’
10. Select ‘Update’ button
11. In the ‘Open Change Close’ pop up box, if ‘Open – Change’ is selected by default:

* Close: Select radio button to choose
* Reason: Select from look-up (see [reasons for closing](#Reasons_for_closing))

Figure 1: Open Change Close box

Screenshot of the 'Open/Change/Close' pop up. Highlighted in red is 'Incompete/pending assessments can only close manually until these are finalised'. The radio button 'Close' has been selected.
Reason for closing selected is 'Primary caregiver of stillborn/deceased child'

1. Select ‘Save’.

**Note:** Once a client record is **closed**, the client will be removed from:

* Universal active list
* Programs active list
* Group template waitlists
* Groups
* Future appointments in calendar.

If a client record is **reopened**, the client will be returned to:

* universal active list
* programs active list.

# Birth notifications

**Note:** On receipt of birth notifications, **open all** babies and their mothers.

**After** contact with the family, the records can be closed via ‘Offer of a home visit’ (from the birth notification list).

## Offer of a home visit

Go to ‘Birth Notification List’ and then ‘Offer of a home visit’.

### Appointment offered from this contact: No

* Unable to contact, close file: **do not use** – contact hospital, follow Council Policy and procedure before closing the file.
* Client deceased, close file: Enter deceased date using digits or calendar box, enter deceased notes in free text field if relevant
* Other, close file: Document notes in free text field (heading ‘Record your attempt…’). For example: ‘Client record closed as client has moved interstate’

### Appointment offered from this contact: Yes

* Services declined, close file: Document notes in the free text field (heading ‘Issues discussed...’). For example: ‘Client record closed as services declined’ Details of contact with the client must be documented in the notes.
* Selected client deceased, close file: Enter deceased date using digits or calendar box, enter deceased notes in free text field if relevant
* Other, close file: Document notes in the free text field (heading ‘Issues discussed…’)

**Note:** **Current bug** – when closing a client via ‘Offer of a home visit’, a reason for being closed is not documented in the ‘Open/Change/Close Client’ screen.

Other reasons why a home visit may be declined of not offered:

* Client has moved interstate
* Client has moved overseas
* Client is receiving care from another service provider (such as private midwife care until six weeks of age).

**Note:**  Remember to also **close** the mother’s record – see [How to close a client](#_How_to_close).

# When clients are stillborn or deceased

When known before ‘Offer of a home visit’.

If recorded and closed using the following process, stillborn and deceased children are displayed with their names and details greyed out, in italics and highlighted in yellow.

## Stillborn

### Create Client Record from Birth Notification

Refer to *Birth notification process* for more information.

**Note: This does not close the client record**

1. Birth details or Birth status: Select ‘stillborn’
2. Open this client for Universal MCH Service: Select Yes.

### Close client record

**Note: This is a critical step**

1. In the CDIS Details (Child) screen, go to ‘Client Details’ then ‘Open/Change/Close Client’
2. Select the ‘Update’ button
3. Select ‘Close’
4. Under ‘Reason’, select ‘Stillbirth’ from look-up list
5. Select ‘Save

### Update client details

**Note:** This counts stillbirth or deceased for reporting purposes

1. In the CDIS Details (Child) screen, go to ‘Client Details’ then ‘Update Client Details’
2. Select the ‘Deceased’ checkbox (**note:** CDIS recognises deceased as the same as stillborn here)
3. Enter deceased date (**note:** Enter date of stillbirth)
4. Enter ‘Deceased Notes’ in the free text field (such as ‘Stillborn at [gestation]’)

* Aboriginal/TSI: Select ‘Not stated/inadequately described’ from look-up list unless stated
* Health Care Card: Type ‘unknown’ in free text field unless stated

1. Select ‘Save

### Close mother’s record

**Note: Only if first-time mother and not currently receiving MCH service and there are no notes on the birth notification stating that Mother would not like contact with MCH.**

1. In the CDIS Details (Mother) screen, go to ‘Client Details’ then ‘Open/Change/Close Client’
2. Select the ‘Update’ button
3. Select ‘Close’
4. Under ‘Reason’, select ‘Primary caregiver of stillborn or deceased child’ from look-up list
5. Select ‘Save’

## Deceased

### Close client record

**Note: this is a critical step**

1. In the CDIS Details (Child) screen, go to ‘Client Details’ then ‘Open/Change/Close Client’
2. Select the ‘Update’ button
3. Select ‘Close’
4. Under ‘Reason’, select ‘Client is deceased’ from look-up list
5. Select ‘Save

### Update client details

**Note: This counts deceased for reporting purposes**

1. In the CDIS Details (Child) screen, go to ‘Client Details’ then ‘Update Client Details’
2. Select the ‘Deceased’ checkbox
3. Enter deceased date –

**Note:** automatically calculates and counts for reporting if ‘death within one month’

1. Enter ‘Deceased Notes’ in the free text field if relevant

* Aboriginal/TSI: Select ‘Not stated/inadequately described’ from look-up list unless stated
* Health Care Card: Type ‘unknown’ in free text field unless stated

1. Select ‘Save

### Close mother’s record

**Note: Only if first-time mother and not currently receiving MCH service**

1. In the CDIS Details (Mother) screen, go to ‘Client Details’ then ‘Open/Change/Close Client’
2. Select the ‘Update’ button
3. Select ‘Close’
4. Under ‘Reason’, select ‘Primary caregiver of stillborn or deceased child’ from look-up list
5. Select ‘Save’

## When a primary caregiver or caregiver is deceased

### Close caregiver’s record

**Note: this is a critical step**

1. In the CDIS Details (Primary Caregiver) screen, go to ‘Client Details’ then ‘Open/Change/Close Client’
2. Select the ‘Update’ button
3. Select ‘Close’
4. Under ‘Reason’, select ‘Client is deceased’ from look-up list
5. Select ‘Save

### Update client details

1. In the CDIS Details (Primary Caregiver/Caregiver) screen, go to ‘Client Details’ then ‘Update Client Details’
2. Select the ‘Deceased’ checkbox
3. Enter deceased date
4. Enter ‘Deceased Notes’ in the free text field if relevant

* Aboriginal/TSI: Select ‘Not stated/inadequately described’ from look-up list unless stated
* Health Care Card: Type ‘unknown’ in free text field unless stated

1. Select ‘Save

### Change relationship status

1. In the CDIS Details (Primary Caregiver/Caregiver) screen, go to ‘Client Details’ then ‘Client Relationships’
2. Take note of all clients (that is, the Client Identifier Numbers) in a ‘Relationship’ link
3. In the CDIS Details (Child) screen, go to ‘Client Details’ then ‘Client Relationships’
4. Select the pencil icon next to deceased primary caregiver’s or caregiver’s name
5. In the ‘Relationship Details’ pop-up box:

* Information sharing: Select the ‘No’ checkbox if relevant
* Primary caregiver: Uncheck the checkbox to deselect
* Caregiver: Uncheck the checkbox to deselect
* Contactable: Uncheck the checkbox to deselect
* Carbon copy (CC): If ticked, uncheck the checkbox to deselect
* Select ‘Save’

1. Re-assign primary caregiver status by selecting the pencil icon next to the new primary caregiver
2. In the ‘Relationship Details’ pop-up box:

* Information sharing: Select ‘Yes’
* Primary caregiver: Select the checkbox to tick
* Caregiver: Not applicable
* Contactable: Selected (checked) by default
* Carbon copy (CC): Select the checkbox to tick if relevant
* Select ‘Save’

1. Continue for all clients in a ‘Relationship’ link with the deceased primary caregiver or caregiver.

### Open newly assigned primary caregiver

1. In the CDIS Details (newly assigned Primary Caregiver) screen, go to ‘Client Details’ and then ‘Open/Change/Close Client’
2. Select ‘Update’ button
3. Select ‘Open’
4. Under ‘Site’, select from look-up list or type first 3 letters of site and choose
5. Under ‘Reason’, select ‘Change in Primary Caregiver status’ from look-up list
6. Select ‘Save’

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