

# MCH CDIS OPEN/CHANGE/CLOSE PROCESS



*Speedy Steps*

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# MCH CDIS ***OPEN/CHANGE/CLOSE*** PROCESS

## What is an ***OPEN*** Client Record?

- “*Open for Universal Service*” = being active or receiving MCH service (previously called “enrolled”)
- ONLY data from Children <6yo is counted for reporting purposes
  - Except EMCH where the referral is counted from the Primary Caregiver



## Which Client Records should be ***OPEN***?

1. ALL Children <6yo
2. ALL Primary Caregivers
3. ANYONE who is actively receiving an MCH Service - then *Close* when ‘episode of care/service’ is finished
  - ✧ Eg: A Caregiver record would be ‘Open’ if they have been referred by MCH (which is recorded from Child Record then notes entered in Caregiver’s record) until the referral has been followed-up and no further service is required, then the Caregiver record would be ‘Closed’
  - It is important to note that Primary Caregivers ALWAYS remain *Open*

## When to ***CLOSE*** a Client 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.
- *Close* reasons include:
  - Client has moved to a council without CDIS
  - 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 Care Giver of stillborn/deceased child
  - Data Entry Error

## How to check if Client Records are ***OPEN*** or ***CLOSED***?

- The ONLY reliable way to determine if Clients are *Open* or *Closed* is to go to ‘*Open/Change/Close Client*’ Screen

### CDIS Details (Client) Screen

‘Client Details’

‘Open/Change/Close Client’

**As a part of data cleansing, it is recommended to check every Client as they attend an appointment**

**It is also recommended to check Children <6yo and Primary Caregivers Records who have been:**

**Transferred in &/or Merged**

## How to *Open* a Client

### CDIS Details (Client) Screen

'Client Details'

'Open/Change/Close Client'

Click "Update" button

"Open Change Close" Pop up box: If *Closed - Open* is selected by default (only option)

*Site\**: Select from look-up list or type first 3 letters of site and Left click to select

*Reason\**: Select from look-up list

- Currently receiving MCH service
- Re-establish MCH service
- Previous client now a Mother
- Change in Primary Caregiver status
- Other – see notes for details
- Data Entry Error

Click "Save"

Once *OPEN*, a Client will be displayed in the 'Active Universal List'  
**Except** where a Client is *OPEN* & 'Birth Notification Received' was selected (on initial 'Create Client/Contact' Screen)  
 - Then 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

### CDIS Details (Client) Screen

'Client Details'

'Open/Change/Close Client'

Click "Update" button

"Open Change Close" Pop up box: If *Open - Change* is selected by default

*Site\**: Select from look-up list or type first 3 letters of site and Left click to select

Click "Save"

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* & a *Site* assigned is via: 'Open/Change/Close Client'

## How to *Close* a Client

### CDIS Details (Client) Screen

'Client Details'

'Open/Change/Close Client'

Click "Update" button

"Open Change Close" Pop up box: If *Open - Change* is selected by default

*Close*: Click on radio button to select

*Reason\**: Select from look-up:

- Client has moved to a council without CDIS
- 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 Care Giver of stillborn/deceased child
- Data Entry Error

Click "Save"

Once *Closed*, the Client will be removed from the 'Universal Active List', 'Programs Active List', Groups & Waitlists

## Close a Client with Incomplete/pending assessments

**If “*Incomplete/pending assessments...*” are identified on Closing a Client Record:  
Complete any incomplete consultations prior to closing the Client Record**

Open / Change / Close

(Incomplete/pending assessments, can only close manually until these are finalised)

CHANGE  CLOSE

Reason closed with incomplete assessments\* Primary Care Giver of stillb: [v]

- Client is receiving services from another care provider
- Change in Primary Caregiver status
- No longer receiving MCH service
- Stillbirth
- Client deceased
- Primary Care Giver of stillborn/deceased child
- Data Entry Error

### CDIS Details (Child) Screen

'Clinical Activity'

'Consultations'

#### Booked appointments and Notes Pending

➤ Future appointments in calendar that have not been opened will be cancelled in calendar on *Closing*

#### Incomplete consultations

Click “Continue” button next to relevant incomplete consultation date

Complete consultation

Click “Save”

Click “Ok” – Successfully saved

Repeat for remaining incomplete consultations

'Client Details'

'Open/Change/Close Client'

Click “Update” button

“Open Change Close” Pop up box:      If *Open - Change* is selected by default

*Close*:              Click on radio button to select

*Reason\**:          Select from look-up:

- Client has moved to a council without CDIS
- 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 Care Giver of stillborn/deceased child
- Data Entry Error

Click “Save”

**Once a Client Record is *Closed*, the Client will be removed from:**

- 1. The ‘Universal Active List’**
- 2. The ‘Programs Active List’**
- 3. Group Template Waitlists**
- 4. Groups**
- 5. Future appointments in Calendar**

**If a Client Record is *re-Opened*, the Client will be returned to:**

- 1. The ‘Universal Active List’**
- 2. The ‘Programs Active List’**

## Birth Notifications

- On receipt of Birth Notifications, *Open* ALL Babies and their Mothers
  - AFTER contact with the family, the Records can be closed via Birth Notification list > “Offer of a home visit”

### Birth Notification List > “Offer of a home visit”

#### Appointment offered from this contact - no:

- *Unable to contact, close file* **DO NOT USE - Contact Hospital**
- *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 in the free-text box above; heading: “Record your attempt...”  
✧ Eg: “Client Record Closed as Client has moved interstate”

#### Appointment offered from this contact - yes:

- *Services declined, close file* Document in the free-text box above; heading: “Issues discussed...”  
✧ Eg: “Client Record Closed as Services declined”
- *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 in the free-text box above; heading: “Issues discussed...”  
✧ Eg: “Client Record Closed as Client has moved interstate”

**CURRENT BUG: When Closing a Client via Birth Notification List > “Offer of a home visit”, a Reason for being Closed is not documented in ‘Client Details’ > ‘Open/Change/Close Client’ Screen**

‘Other’ reasons why a home visit may be declined/not offered:

- Client has moved interstate
- Client has moved overseas
- Client has moved to a council without CDIS
- Client is receiving care from another service provider (Eg: *Private Midwife Care until 6wks of age*)

**Remember to also Close Mother Record – See: [How to Close a Client \(Page 2\)](#)**

## When Clients are Stillborn or Deceased – known prior to “Offer of a home visit”

- Stillborn & deceased children are displayed with their names/details **greyed out, in italics and highlighted in yellow**
  - Provided they have been recorded and closed via the following process

### Stillborn

#### 1. Create Client Record from Birth Notification - (Refer to “MCH CDIS Birth Notification Process”)

- *Birth details/Birth Status:* Select “stillborn”
- Click “Yes” - *Open this Client for Universal MCH Service\**

**This does NOT Close the Client Record**

#### 2. Close Client Record

- i. **CDIS Details (Child) Screen** > ‘Client Details’ > ‘Open/Change/Close Client’
- ii. Click “Update” button
- iii. Click “Close”
- iv. Reason\*: Select “Stillbirth” from look-up list
- v. Click “Save”

**This is a CRITICAL step**

#### 3. Update Client Details

**This COUNTS stillbirth/deceased for reporting purposes**

- i. **CDIS Details (Child) Screen** > ‘Client Details’ > ‘Update Client Details’
- ii. Click “Deceased” tick box (NB: CDIS recognises deceased as the same as stillborn here)
- iii. Enter *Deceased Date* (NB: Enter date of stillbirth)
- iv. Enter “Deceased Notes” in free-text field – Eg: “Stillborn @ [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
- v. Click “Save”

#### 4. Close Mother Record of Stillborn

- i. **CDIS Details (Mother) Screen** > ‘Client Details’ > ‘Open/Change/Close Client’
- ii. Click “Update” button
- iii. Select “Close”
- iv. Reason\*: Select “Primary Care Giver of stillborn/deceased child” from look-up list
- v. Click “Save”

**ONLY if First Time Mother and NOT currently receiving MCH Service**

### Deceased

#### 1. Close Client Record

- i. **CDIS Details (Child) Screen** > ‘Client Details’ > ‘Open/Change/Close Client’
- ii. Click “Update” button
- iii. Click “Close”
- iv. Reason\*: Select “Client is deceased” from look-up list
- v. Click “Save”

**This is a CRITICAL step**

#### 2. Update Client Details

**This COUNTS deceased for reporting purposes**

- i. **CDIS Details (Child) Screen** > ‘Client Details’ - ‘Update Client Details’
- ii. Click “Deceased” tick box
- iii. Enter *Deceased Date*
- iv. Enter “Deceased Notes” in 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
- v. Click “Save”

**Automatically calculates & counts if “Death within one month” for reporting**

#### 3. Close Mother Record of Deceased Child

- i. **CDIS Details (Mother) Screen** > ‘Client Details’ > ‘Open/Change/Close Client’
- ii. Click “Update” button
- iii. Select “Close”
- iv. Reason\*: Select “Primary Care Giver of stillborn/deceased child” from look-up list
- v. Click “Save”

**ONLY if First Time Mother and NOT currently receiving MCH Service**

## When a Primary Caregiver/Caregiver is deceased

### 1. Close Primary Caregiver Record



- i. **CDIS Details (Primary Caregiver) Screen** > 'Client Details' > 'Open/Change/Close Client'
- ii. Click "Update" button
- iii. Click "Close"
- iv. Reason\*: Select "*Client is deceased*" from look-up list
- v. Click "Save"

**This is a CRITICAL step**

### 2. Update Client Details

- i. **CDIS Details (Primary Caregiver/Caregiver) Screen** > 'Client Details' - 'Update Client Details'
- ii. Click "Deceased" tick box
- iii. Enter *Deceased Date*
- iv. Enter "Deceased Notes" in 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
- v. Click "Save"

### 3. Change Relationship Status

- i. **CDIS Details (Primary Caregiver/Caregiver) Screen** > 'Client Details' > 'Client Relationships'
- ii. Take note of all clients (i.e. the Client Identifier Numbers) in a 'Relationship' link
- iii. **CDIS Details (Child) Screen** > 'Client Details' > 'Client Relationships'
- iv. Click  next to deceased Primary Caregiver/Caregiver name
  - "Relationship Details" Pop-up box:
    - Information sharing\*: Tick 'No' if relevant
    - Primary Care Giver: Click on tick-box to untick
    - Caregiver: Click on tick-box to untick
    - Contactable: Click on tick-box to untick
    - Carbon copy (cc)...: If ticked, click on tick-box to untick
    - Click "Save"
- v. Re-assign Primary Caregiver Status by clicking  next to new Primary Caregiver
  - "Relationship Details" Pop-up box:
    - Information sharing\*: Click 'Yes'
    - Primary Care Giver: Click on tick-box to tick
    - Caregiver: N/A
    - Contactable: Ticked by default
    - Carbon copy (cc)...: Tick if relevant
    - Click "Save"
- vi. Continue for all clients in a 'Relationship' link with the deceased Primary Caregiver/Caregiver

### 4. Open newly assigned Primary Caregiver

- i. **CDIS Details (newly assigned Primary Caregiver) Screen** > 'Client Details' > 'Open/Change/Close Client'
- ii. Click "Update" button
- iii. Click "Open"
- iv. Site\*: Select from look-up list or type first 3 letters of site and Left click to select
- v. Reason\*: Select "*Change in Primary Caregiver status*" from look-up list
- vi. Click "Save"

