

MCH CDIS TRANSFER PROCESS



Speedy Steps

December 2016

Contents

Change Client Record Site	2
1. Change Client Record Site	2
2. Check & Update Client Details	2
3. Check & Update Client Address	2
4. Check & Update Primary Caregiver Details	2
5. Repeat Process for Primary Caregiver, Caregiver(s) & Siblings if relevant	2
Transfer IN from a CDIS Council	3
1. Permission given by Primary Caregiver to Transfer Client Record	3
2. Search, Select & Transfer Client Record	3
3. Check Client Record is <i>Open</i> – <i>Open</i> the Client Record if Closed	3
4. Check Client Consent has been Recorded for the Victorian MCH Service.....	3
5. Check & Update Client Details	3
6. Check & Update Client Address	3
7. Repeat Process for Primary Caregiver, Caregiver(s) & Sibling(s) if relevant.....	3
If an INCORRECT Client Record Transferred IN from a CDIS Council	4
Transfer IN from a Non-CDIS Council	5
1. Permission given by Primary Caregiver to Transfer Client Record	5
2. Search Client Record	5
3A. Matching Client Record on CDIS	5
3B. No Matching Client Record on CDIS.....	6
4. Receiving the Client Record from the Previous Council	6
5. Repeat Process for Primary Caregiver, Caregiver(s) & Sibling(s) if relevant.....	6
Transfer OUT to a Non-CDIS Council	7
1. Transfer Request Received	7
2. Add Note to Client Record	7
3. <i>Close</i> Client Record	7
4. Save &/or Print Client Record	7
5. Send Client Record to Requesting Council.....	8
6. Repeat Process for Primary Caregiver, Caregiver(s) & Sibling(s) if relevant.....	8
Using the ‘Council Transfer History’ Screen.....	9
APPENDIX – List of Organisations Currently on CDIS	10

CDIS Transfers are ALWAYS performed from the NEW Site/Council

ONLY TRANSFER IN

As per MCH Service Guidelines (2011):

The Client Record remains at the previous Site/Council until Primary Caregiver permission has been given to transfer the Client Record to the new Site/Council

This ensures that a Client will continue to receive appointment reminders from the previous Site/Council until they engage with the new Site/Council – therefore increasing MCH engagement

MCH CDIS *Transfer* PROCESS

Change Client Record Site – previously referred to as “Internal Transfers”

As per MCH Service Guidelines (2011):

The Client Record remains at the previous Site/Council until Primary Caregiver permission has been given to transfer the Client Record to the new Site/Council

1. Change Client Record Site

CDIS Details (Child) Screen

‘Client Details’

‘Open/Change/Close Client’

Current Service Summary

Click “Update” button

“Open Change Close” Pop up box: - *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”

2. Check & Update Client Details

CDIS Details (Child) Screen

‘Client Details’

‘Update Client Details’ – check and update if relevant

Click “Save”

Click “OK” – Successfully Saved

3. Check & Update Client Address

CDIS Details (Child) Screen

‘Client Details’

‘Client Addresses’ – check and update if relevant

Click “+Add Address” button

“Update Address” Pop-up box:

*Source**: Select from the look-up list

*Address type**: Select from look-up list – *Home* is auto-filled by default

Enter other address fields

*Suburb**: Enter first 3 letters, then select from the look-up list

Start Date: Defaults to today’s date, edit by using digits or calendar box

Click “Primary Address” tick-box

Click “Save”

“Update Address; Relationships” Pop-up box:

Click tick-box of Primary Caregiver and other(s) relevant

Click “Save”

Click “OK” – “Successfully saved changes”

4. Check & Update Primary Caregiver Details

CDIS Details (Child) Screen

‘Client Details’

‘Client Relationships’

Click on [Client Identifier Number](#) hyperlink of Primary Caregiver

CDIS Details (Primary Caregiver) Screen

‘Client Details’

‘Update Client Details’ – check & update: particularly home, mobile and email

Click “Save”

Click “OK” – “Successfully saved”



**Ensure ALL Children <6yrs
& Primary Caregivers are
OPEN**

5. Repeat Process for Primary Caregiver, Caregiver(s) & Siblings if relevant

Transfer IN from a CDIS Council

As per MCH Service Guidelines (2011):

The Client Record remains at the previous Site/Council until Primary Caregiver permission has been given to transfer the Client Record to the new Site/Council

1. Permission given by Primary Caregiver to Transfer Client Record

➤ Specific permission needs to be given for others listed in Client Relationships

2. Search, Select & Transfer Client Record

Search Screen

Council: Select 'State'
 Last Name: Enter first 3 letters
 First Name: Enter first 3 letters
 Click "Search"

Click on [Client Identifier Number](#) hyperlink of appropriate Client

Transfer Client

Transfer Reason*: Select 'Changed Municipality' from look-up list
 Override (if necessary): Select receiving Site from look-up list
 Click on tick-box: 'Cancel clients appointments in current Council'
 Comments: Enter comments in free-text field if relevant
 ✧ Eg: "Verbal permission given by Primary Caregiver <name> for the transfer of records."

Click "Transfer client to my Council" button

3. Check Client Record is Open – Open the Client Record if Closed

CDIS Details (Child) Screen

'Client Details'
 'Open/Change/Close Client'
 Click "Update" button
 "Open Change Close" Pop up box: - If *Closed*, *Open* is selected by default
 Site*: Ensure correct Site is selected from look-up
 Click "Save"

4. Check Client Consent has been Recorded for the Victorian MCH Service

CDIS Details (Child) Screen

'Client Details'
 'Consent'

Victorian Maternal and Child Health Service

Click "+Add" button

Update Consent for Maternal and Child Health Service

Date Consent signed/updated: Enter using digits or Calendar Box
 Type: Select 'Universal' from look-up list
 Consent for service: Select appropriate from look-up list
 Privacy information....: Select appropriate from look-up list
 Victorian/Council: Select 'Victorian MCH Service' from look-up list
 Consent form status: Select appropriate from look-up list – upload attachment as required
 Consent notes: Enter in free-text field if relevant

Click "Save"

Click "OK" – Successfully saved

5. Check & Update Client Details

See: ["Change Client Record Site" #2](#) (Page 2)

6. Check & Update Client Address

See: ["Change Client Record Site" #3](#) (Page 2)

7. Repeat Process for Primary Caregiver, Caregiver(s) & Sibling(s) if relevant

**Additional
 Consent(s) for individual
 Councils & specific programs
 may also be required as per
 Council's internal policy...**

**+ Add here & attach
 documents as required**

If an INCORRECT Client Record Transferred IN from a CDIS Council

CDIS Details (Child) Screen

'Clinical Activity'

'Transfer Client (Use Only for councils on CDIS)'

Transfer Client

Transfer Reason*: Select '*Transferred in error*' from look-up list

Transfer to Council*: Select original Council from look-up list

Override (if necessary): Check Site and if necessary, select original Site from look-up list

- ◆ *NB: The original Site is displayed on the Client 'Summary Page', under 'Future Appointments' &/or 'Service History'*

Click on tick-box: '*Cancel clients appointments in current Council*'

Comments: Enter comments in free-text field if relevant

Click "Transfer client" button

Also see: ["Using the 'Council Transfer History' Screen"](#) (Page 9)

This function to *Transfer Out* is **ONLY** to be used in these cases:

That is, when a Client Record has been Transferred IN from a CDIS Council and it is the incorrect Client Record

**Clinical judgement
determines if
communication with the
previous or new
Site/Council regarding the
Client is required**

Transfer IN from a Non-CDIS Council

As per MCH Service Guidelines (2011):

The Client Record remains at the previous Site/Council until Primary Caregiver permission has been given to transfer the Client Record to the new Site/Council

1. Permission given by Primary Caregiver to Transfer Client Record

- Specific permission needs to be given for others listed in Client Relationships (Eg: Caregivers, siblings)
- Send 'transfer request' to original Council requesting Text or PDF document of Client Record

2. Search Client Record

Search Screen

Council: Select 'State'
 Last Name: Enter first 3 letters
 First Name: Enter first 3 letters
 Click "Search"

3A. Matching Client Record on CDIS

- Click on [Client Identifier Number](#) hyperlink if matching record found on CDIS
- Confirm with Client that it is the correct Client Record

i. Transfer In or Change Site for Matching Client Record

Transfer In - If matching Client Record is in another Council (See: ["Transfer In from a CDIS Council"](#) Page 3)
 Change Site - If matching Client Record is in your Council (See: ["Change Client Record Site"](#) Page 2)

ii. Merge Records

Update existing CDIS record with new details and attach other original Client Record when transferred
 Merge multiple CDIS records if required (Refer to: "MCH CDIS Birth Notification Process")

iii. Check Client Record is *Open* – *Open* the Client Record if Closed

'Client Details' > 'Open/Change/Close Client'
 See: ["Transfer In from a CDIS Council" #3](#) (Page 3)

iv. Check & Add Client Consent for Victorian MCH Service

'Client Details' > 'Consent'
 See: ["Transfer In from a CDIS Council" #4](#) (Page 3)

v. Add Note to Client Record

'History/Notes' > 'Notes' > "+ Add Note" button
 ✧ Eg: "Transfer request sent to <previous council name>, non-CDIS council, as permission given by Primary Caregiver <name>."

vi. Check & Update Client Details

'Client Details' > 'Update Client Details'
 See: ["Change Client Record Site" #2](#) (Page 2)

vii. Check & Update Client Address

'Client Details' > 'Client Addresses'
 See: ["Change Client Record Site" #3](#) (Page 2)

viii. Check & Update Primary Caregiver Details

'Client Details' > 'Update Client Details'
 See: ["Change Client Record Site" #4](#) (Page 2)

ix. Check & Update/Add Relationships

'Client Details' > 'Client Relationships'
 Refer to: "MCH CDIS Birth Notification Process"

x. Go to #4: ["Receiving the Client Record from the Previous Council"](#) (Page 6)



...OR...

3B.No Matching Client Record on CDIS

i. Create NEW Client

Click “Create Client” button
 ‘CDIS – Create Client/Contact’ Screen
 Enter details as relevant

ii. Open Client Record

‘CDIS – Create Client/Contact’ Screen
 Open for...: Click “Yes”
 Site*: Select from look-up list
 Click “Save and Open”
 Click “ok” – Successfully saved

iii. Add Relationships

‘Client Details’ > ‘Client Relationships’ > “+ Add Relationship” button
 “Create Relationship” Pop-up box:
 Council: Select ‘State’
 Search for Primary Caregiver, Caregiver(s) and Sibling(s) if also transferring
 If matching record found: “Create Relationship” button
 “Relationship Details” Pop-up box
 If no matching record found: “Create Contact” button
 ‘CDIS – Create Client/Contact’ Screen
 “Relationship Details” Pop-up box



iv. Add Client Consent for Victorian MCH Service

‘Client Details’ > ‘Consent’ > “Update” button
 See: [“Transfer In from a CDIS Council” #4](#) (Page 3)

v. Add Note to Client Record

‘History/Notes’ > ‘Notes’ > “+ Add Note” button
 ✧ Eg: “Transfer request sent to <previous Council name>, non-CDIS Council, as consented by Primary Caregiver <name>.”

4. Receiving the Client Record from the Previous Council

- ‘Save As’ electronic copy &/or ‘Scan’ hard copy
- Save new electronic copy to desktop or secure drive
- Add electronic copy as an attachment - ‘History/Notes’ > ‘Attachments’
- Add Note to Client Record - ‘History/Notes’ > ‘Notes’ > “+ Add Note” button
 - ✧ Eg: “Client Record has been transferred from <previous Council name> to <new Council name>; see attached”
- Dispose or archive electronic copy &/or hard copy - as per internal Council policy

5. Repeat Process for Primary Caregiver, Caregiver(s) & Sibling(s) if relevant

Transfer OUT to a Non-CDIS Council

Once a Client Record is transferred, no further notes can be added

1. Transfer Request Received

2. Add Note to Client Record

'History/Notes'

'Notes'

Click "+Add Note" button

✧ Eg: "Transfer request received from <requesting Council>; electronic copy/hard copy of Client Record sent"

3. Close Client Record

'Client Details'

'Open/Change/Close Client'

Click "Update" button

"Open Change Close" Pop up box:

Click 'Close': If Client is *Open*, *Change* is selected by default
*Reason**: Select 'Client has moved to council without CDIS'
 Click "Save"

4. Save &/or Print Client Record

i. Summary Page

Client Details > Summary Page

Right click anywhere on page and select *Print...*

Print in Auto Colour; Scan in Colour; "Save As" into a secure drive

- Name the document: "<CLIENT NAME> – Summary"

ii. Consent

Client Details > Consent

Right click anywhere on page and select '*Print...*'

Print in Auto Colour; Scan in Colour; "Save As" into a secure drive

- Name the document: "<CLIENT NAME> – Consent"

iii. Flags / Alerts

Clinical Activity > Flags/Alerts

Click "Print" button

Click ▼ next to Save button; select 'Save As'

"Save As" into a secure drive

- Name the document: "<CLIENT NAME> – Flags"

iv. Immunisations

Clinical Activity > Immunisations

Right click anywhere on page and select *Print...*

Print in Auto Colour; Scan in Colour; "Save As" into a secure drive

- Name the document: "<CLIENT NAME> – Immunisations"

v. Pregnancy & Delivery

History/Notes > Pregnancy & Delivery

Click "Print" button

Print in Auto Colour; Scan in Colour; "Save As" into a secure drive

- Name the document: "<CLIENT NAME> – Birth"

vi. Notes & Attachments

Client File

'Client File'

Click ▼ next to Save button; select 'Save As'

"Save As" into a secure drive

- The zip file will be named: "*Client_File_<CLIENT NAME>_<Date>*"

Until all organisations providing MCH Service are using CDIS, a complete health record cannot be transferred

There is a legal obligation to provide the requesting Council with a Client Record which is as close to a complete health record as possible

The ability to save &/or print a complete health record in CDIS is being investigated

NB: The 'comments' will not be visible when printed/saved for transfer

NB: Only applicable if immunisation is attended within the MCH Service

This is *not* an exhaustive list of information to include in the transfer of a Client Record

Clinical judgement is required to determine if *additional* information is to be sent

5. Send Client Record to Requesting Council

- Attach electronic documents to email:
 - i. Summary Page “<CLIENT NAME> – Summary”
 - ii. Consent “<CLIENT NAME> – Consent”
 - iii. Flags/Alerts “<CLIENT NAME> – Flags”
 - iv. Immunisations “<CLIENT NAME> – Immunisations” (If applicable)
 - v. Pregnancy & Delivery “<CLIENT NAME> – Birth”
 - vi. Notes & Attachments “Client_File_ <CLIENT NAME> _<Date>”
(Zip file contains *ProgressNotes* pdf & *Individual Attachment* documents)
- Email electronic documents to requesting Council
- Mail hard copy Record via registered post if required
- Dispose or archive electronic copy &/or hard copy - as per internal Council policy

6. Repeat Process for Primary Caregiver, Caregiver(s) & Sibling(s) if relevant

There is a legal obligation to provide the requesting Council with a Client Record which is as close to a complete health record as possible

Receiving Councils may request further/additional information to that which is provided in the transferred Client Record

Clinical judgement determines if communication with the previous or new Council regarding the Client is required

Using the 'Council Transfer History' Screen

It is recommended that each day the 'Inward Transfers' are reviewed for the last business day; this is to ensure:

- ALL Children <6yrs & Primary Caregivers are OPEN and assigned a Site
 - This is vital to be counted for reporting purposes
- If a Client Record is transferred back into your Council (Reason*: "Transferred in error")
 - The original appointments may have been cancelled in the Calendar - action is required
 - ◆ Go to Client 'Summary Page', 'Future Appointments', note appointments/Site & re-enter in Calendar

'Home' Screen

'General'

'Council Transfer History'

Council: Defaults to your Council

Date from: Enter using digits or Calendar Box

Date to: Enter using digits or Calendar Box

Select dates to reflect the last business day, by using digits or calendar box

Inward Transfers

Click on Client ID number

"Person Details" Pop-up box:

Click "Open" button

CDIS Details (Child) Screen

'Client Details'

'Open/Change/Close Client'

Click "Update" button

"Open Change Close" Pop up box: - If *Closed*, *Open* is only option

Open / Change: Select as required

Site*: Ensure correct Site is selected from look-up list

Reason*: Select 'Data Entry Error' from look-up list

Click "Save"

Hint Some find it easier to use an Excel Spreadsheet to work from...

To view in an Excel Spreadsheet:

1. Highlight all 'Inward Transfers'
 - Left click hold and drag across all 'Inward Transfers'
2. 'Copy'
 - Whilst highlighted, hover over and Right click, select 'copy' with left click
 - OR whilst highlighted, press Ctrl and c simultaneously
3. Open new Excel Spreadsheet
4. 'Paste'
 - Right click on A1 cell and select 'paste' with left click
 - OR left click on A1 cell and press Ctrl and v simultaneously

To use this Excel Spreadsheet:

1. 'Copy' the [Client Identifier Number](#)
2. 'Paste' into CDIS Search
3. Click "Search" button
4. Click on [Client Identifier Number](#) hyperlink to view history
5. Ensure Client is *Open* with *Site* assigned as above
6. Repeat for others on list as necessary

The **ONLY** reliable way to identify if a Client Record is *OPEN* & a *Site* assigned is via: 'Open/Change/Close Client'

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

APPENDIX – List of Organisations Currently on CDIS

Alpine Shire Council	Moira Shire Council
Ararat Rural City Council	Monash City Council
Banyule City Council	Moonee Valley City Council
Bass Coast Health	Moorabool Shire Council
Baw Baw Shire Council	Moreland City Council
Benalla Rural City Council	Mornington Peninsula Shire Council
Boroondara City Council	Mount Alexander Shire Council
Cardinia Shire Council	Moyne Shire Council
Central Goldfields Shire	Murrindindi Shire Council
Colac Otway Shire Council	Nillumbik Shire Council
Corangamite Shire Council	Northern Grampians Shire Council
Darebin City Council	Orbost Regional Health Service
Frankston City Council	Pyrenees Shire Council
Glenelg Shire Council	Queenscliffe Borough Council
Golden Plains Shire Council	South Gippsland Shire Council
Greater Bendigo City Council	Southern Grampians Shire Council
Greater Dandenong City Council	Stonnington City Council
Greater Geelong City Council	Surf Coast Shire Council
Hobsons Bay City Council	Swan Hill Rural City Council
Horsham Rural City Council	Warrnambool City Council
Hume City Council	West Wimmera Health Service
Knox City Council	West Wimmera Shire Council
Macedon Ranges Shire Council	Wodonga City Council
Manningham City Council	Wyndham City Council
Mansfield Shire Council	Yarra City Council
Maribyrnong City Council	Yarra Ranges Shire Council
Mitchell Shire Council	Yarriambiack Shire Council