

KDHE DAISEY Release Notes January 2016



This release contains DAISEY system changes and new features of interest to KDHE users. Major changes include:

- Enhancements to the export function:
 - Form created and form modified data have been added to the export
 - Users may now include profile data with any activity form exports
- Confidentiality Mode allows users to share, restrict and flag profiles and/or forms:
 - For organizations in a Data Sharing Community (Geary County):
 - Restricted profile and activity forms are hidden from other organizations.
 - Restricted profile and activity forms are viewable by users in the creating organization, and are flagged by red highlighting and a stop sign.

Export Enhancement: User Created and Modified Columns

Exported data now contains columns shown in Figure 1. These columns will appear at the end of the spreadsheet:

- Created by
- Last Modified By
- Organization Last Modified
- Date & Time Last Modified

Figure 1: User Created and Modified Columns

Created by	Last Modified by	Organization Last Modified	Date & Time Last Modified
Text	Text	Text	Text
No	No	No	No
Sue Smith	Jane Jones	ABC Organization	09/14/2015 09:10 PM
Sue Smith	Sue Smith	ABC Organization	09/16/2015 11:16 PM
Sue Smith	Sue Smith	ABC Organization	10/01/2015 10:38 AM
Jane Jones	Jane Jones	ABC Organization	10/01/2015 09:25 AM

Export Enhancement: Adding Profile Data to Exports

When exporting activity form data, you now have the option to add profile data to the export. To include profile data in the export, click “Export with Profile” from the alert box that pops up during the export process (see Figure 2).

The export spreadsheet will still contain one row of data for each form that has been saved or submitted. Data for profiles of the child and/or caregiver attached to each form will appear to the right of activity form data on each row. Profile data columns begin after the “Date & Time Last Modified” column for that activity form.

For child activity forms, there will be 3 vertical sections of the spreadsheet: first activity data, then child data, then caregiver data. If no caregiver profile was attached to this form, this 3rd section will be blank.

For caregiver activity forms, there will be 3 vertical sections of the spreadsheet: first activity data, then caregiver data, then child data. If no child profile was attached to this form, this 3rd section will be blank.

New Feature: Confidentiality Mode - Profiles

NOTE: This feature is only available to organizations in a Data Sharing Community

This feature allows users to indicate if a profile can be shared (unrestricted) because the client provided authorization for their data to be shared, or confidential (restricted) because the client declined authorization. Users will see an alert when they save or submit the profile form where they can indicate whether the client agreed to data sharing or the profile should be restricted (Figure 3).

If a user indicates a form should be restricted, the search grid will highlight the record in red and give a stop sign in the Action column. Restricted records will not be shared or visible to any user outside of their organization if they are within a data sharing community.

Figure 2: Export with Profile

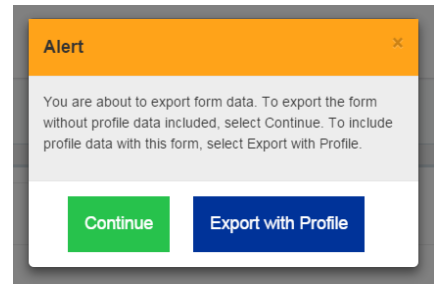
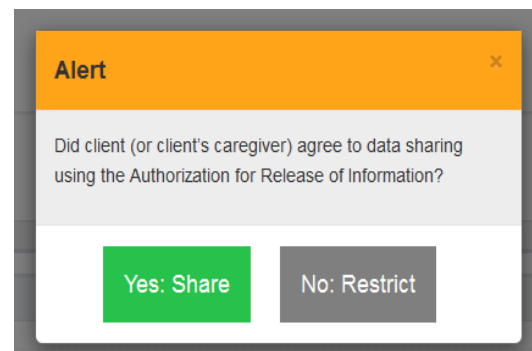


Figure 3: Profile Confidentiality Alert Box



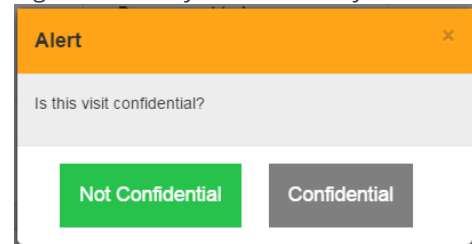
New Feature: Confidentiality Mode – Activity Forms

NOTE: This feature is available to all KDHE grantee organizations, but is only for forms related to Family Planning visits.

If confidentiality mode has been enabled for an activity form, an alert box will pop up after clicking “Save” or “Submit” (Figure 4). The wording of the alert box may vary depending on the form.

If a user clicks the **green** (unrestricted/not confidential) option, this form will appear as normal in the search grids. This form may be switched to the grey (restricted) option at any time by returning to edit the form and saving as restricted.

Figure 4: Activity Confidentiality Alert Box



















If a user clicks the **grey** (restricted/confidential) option:

- The restricted form will be marked in the search grids with red highlighting and a stop sign, as show in Figure 5.
- If a user is in a data sharing community, the restricted form will not be visible to anyone outside of their organization.
- The restricted status is permanent. This form cannot be reverted to unrestricted status.

Figure 5: View for an org that marked a Family Planning Form as confidential/restricted.

Family Activities Form History

10 records per page Search:

ID	Activity Forms	Activity Date	Caregiver Involved	Child Involved	Organization	Status	Family FormId	Action
ID	Activity Fr	Activity D	Caregiver Invol	Child Invo	Organizati	All	Family FormId	
127612	Family Planning Service Form	12/29/2015	Caregiver First Name Caregiver Last Name		Training - Data Sharing Org 1	In Progress	32	   
127173	KDHE Program Referral Form	11/20/2015	Caregiver First Name Caregiver Last Name		Training - Data Sharing Org 1	In Progress	36	   
127172	Maternal Child Health Service Form	11/20/2015	Caregiver First Name Caregiver Last Name		Training - Data Sharing Org 1	In Progress	33	   
127164	Maternal Child Health Service Form	11/18/2015		Child First Name Child Last Name	Training - Data Sharing Org 1	Submitted	33	   

Showing 1 to 4 of 4 entries

First Previous 1 Next Last