Client Visit

DAISEY

STEP ONE

Locate or Create Profile
Client information that
will not change

REQUIRED

Avoid creating duplicates by searching before creating a new profile.

TIP: Check for variations in the spelling of names.

See DAISEY User Manual Section 4d & 5c.

Link Other Family Profiles
As necessary

Search for or create profiles to link families.

See DAISEY User Manual Section 4f & 5e.

STEP TWO

Fill Out KDHE Program Visit Form
Client information that
might change

REQUIRED

Most fields will auto-fill from the previous Visit Form. Confirm that the information is correct EVERY client encounter. Update any information that has changed. Make sure the program selection reflects the current visit.

NOTE: This form is used to 'count' client encounters.

STEP THREE

Fill Out Service Form
(BaM, Family Planning, MCH, TPTCM, PMI)

REQUIRED

One of the service forms must be completed to capture program specific services provided during the visits.

STEP FOUR

Fill Out Referral Form
As necessary

Fill out referrals made and 'save'; if follow-up is necessary, complete follow-up then 'submit'.

NOTE: Must complete a referral form if any referrals are made as part of the program services provided during the visit.

TIP: Only indicate referrals you made. It is not necessary to indicate 'no' for referrals not made.