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| CDIS birth notification process |
| Victorian Maternal and Child Health (MCH) Child Development Information System (CDIS)December 2020 |

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# Entering a birth notification into CDIS

**Note:** If the Birth Notification is **not** in your Council – return the birth notification to hospital and contact relevant Council

**Do not create new client record**.

(See [Appendix 1.1](#_1.1_General) for more guidance and tips)

## Run a search on the Search screen:

1. Council: Select ‘State’ from look-up list (see [Appendix 1.2](#_1.2_Creating_a))
2. Last name: Enter last name of mother. Last name defaults to CAPITALS (see [Appendix 2.1](#_2.1_Last_name))
3. Birth date of newborn: Enter by using digits or calendar box (see Appendix 2.3)
4. Enter mobile telephone number
5. Select the ‘Search’ button

If there is no matching data for newborn on birth notification, select the ‘Create client’ button

## Create ‘Client/Contact’ screen

### Client demographics

* Last name (required): Enter Last Name of Mother. Last Name defaults to CAPITALS (see [Appendix 2.2](#_2.2_Last_name))
* First name (required): Enter as BB of mother first name or BG of mother first name (BB is ‘baby boy’, BG is ‘baby girl’). (See Appendix 1.3)
Example: First name of male newborn: BB of Mary (where Mother is Mary)
* Gender (required): Enter or Select from look-up list (see [Appendix 2.4](#_2.4_Gender))
* Birth date (required): Enter using digits (see [Appendix 2.3](#_2.3_Birth_date))
* Premature (required): Select checkbox if relevant (if known). Enter prematurity in weeks and days premature (**not** gestation). (See [Appendix 1.4](#_1.4_Prematurity))
Example: For a baby at 34.2 weeks gestation, enter ‘5 weeks and 5 days premature’
* Adopted: Select checkbox if relevant (if known)
* First time mother for this child: Select checkbox if relevant (if known). (see [Appendix 1.5](#_1.5_First_time))

### Birth notification

* Birth notification (required): Select ‘Yes’ (See [Appendix 1.6](#_1.6_Birth_notification))

### Birth details

* Birth notice received date (required): Defaults to today’s date (see [Appendix 2.3](#_2.3_Birth_date))
* Hospital (or place of birth): Enter first 3 letters and select from look-up list
* Birth status: Select ‘Liveborn’ from look-up list. If stillborn, create client record (including relationships), then follow stillborn process (see [Appendix 2.5](#_2.5_Birth_status))
* Full term or premature: Select from look-up list (see [Appendix 2.6](#_2.6_Full-term_or))
* Singleton or multiple: Select from look-up list (see [Appendix 2.7](#_2.7_Singleton_or))
* Special care nursery: Select from look-up list or leave blank (See [Appendix 2.8](#_2.8_Special_care))
* Priority visit required: Select appropriate response
* Home visit priority reason: Select from look-up list (if relevant)

### Address

Enter data fields using free text (see [Appendix 2.9](#_2.9_Address_–)).

* Suburb (required): Enter first 3 letters and select from look-up list (see [Appendix 1.7](#_1.7_Suburb)). Suburbs from throughout Australia are included, and you must ensure you do not select a suburb with the same name in another State or Territory of Australia.

### Other details

Enter data fields using look-up list or free text (if known).

* Main language at home: Enter this if known.
* Primary care-giver - Interpreter required: (Previously labelled “Interpreter required”): required.
* Select Checkbox: Yes, No, or Unknown.
* When selecting Yes: Select from Language look up list
* Birth country: Required: Enter first 3 letters and select from look-up list. If receiving a birth notification, this will be ‘Australia’.
* Birth State should also be completed

Aboriginal/TSI is a mandatory field. It is recommended that Not Stated/in adequately described is selected to enable auditing of whether staff are asking and completing the Aboriginal/TSI question.

### Language exposure

Not required to enter at this time – recommended to complete at home visit

### Family details

Not required to enter at this time

### Relationships

**Note:** It is vital to add or link the mother using the following process

#### Select the Add button (green plus icon):



#### In the ‘Create Relationship’ pop-up box, search:

* Council: Select ‘State’ from look-up list (see [Appendix 1.2](#_1.2_Creating_a))
* Last name: Enter last name of mother. Last name defaults to capitals (see [Appendix 2.2](#_2.2_Last_name))
* First name: Enter first name of mother
* Date of birth (DOB): Enter by using digits or calendar box (if known) (see [Appendix 2.3](#_2.3_Birth_date))
* Enter mobile number
* Select the ‘Show Address’ checkbox
* Select the ‘Search’ button to run the search

#### Look for a matching mother record in the search results:

Last name, first name, DOB, address, mobile number – allow for minor spelling mistakes

* If there is **one or more** matching mother records – go to ‘If Mother has an existing CDIS Record’
* If in doubt of matching mother record – ‘Create client’ record. If at a later date the mother confirms she has other children, the duplicate records **must** be merged- see ‘[Merging duplicate records](#_Merging_duplicate_records)’
* If **no** matching mother record exists – Select ‘Create client’ button

#### Client demographics fields

* Last name (required): Enter last name of mother. Last name defaults to all capitals (See Appendix 2.2)
Example: Last name "Test” would be TEST
* First name (required): Enter first name of mother. First letter is capitalised and the rest lower case (for example, ‘Mary’)
* Gender (required): Enter or select from look-up list (see [Appendix 2.4](#_2.4_Gender))
* Birth date (required): Enter using digits (see [Appendix 2.3](#_2.3_Birth_date))

#### Address fields

See Appendix 2.9.

Enter data fields using free text (see [Appendix 2.10](#_2.10_Address_–)).

* Suburb (required): Enter first 3 letters and select from look-up list (see [Appendix 1.7](#_1.7_Suburb)).

#### Other details fields

Enter data fields using look-up list or free text (if known) (see [Appendix 1.8](#_1.8_Reminders_and)).

Ensure phone numbers are entered as displayed on birth notification. Phone numbers should include area code and no spaces between digits. For example, 0391231234 (home or work) and 0410111222 (mobile). The mobile number must be entered in the mobile field to ensure that SMS reminders can be generated.

* Appointment reminders (required): Select ‘SMS’
* Receive letters (required): Select ‘Email’.



#### Open for service fields

* Open this client for Universal MCH Service: Select ‘Yes’
* Site (required): Select from look-up list (see [Appendix 2.11](#_2.11_Site))
* Select ‘Save’ button.

#### Relationship details pop-up fields

* Related client or contact: Select ‘Mother’ from look-up list (see [Appendix 2.12](#_2.12_Related_client))
* Birth mother? Select ‘Yes’
* Information sharing (required): Select ‘Yes’
* Primary caregiver: Select checkbox and tick as contactable
* Select ‘Save’ button

### Professionals

Not required to enter at this time.

### Family customs

Not required to enter at this time.

### Additional needs

Enter data fields using look-up list (if known).

### Child protection status

Enter data fields using look-up list or free text (if known).

### Open for Service

* Open this newborn for Universal MCH Service: Select ‘Yes’ (See Appendix 1.13)
* Site (required): Select from look-up list (see [Appendix 2.11](#_2.11_Site))
* Select ‘Save’ or Save As button (see Appendix 1.9).

**The client (child) will now appear in the Birth notifications list.**

# If the mother has an existing CDIS record

## If there is one matching mother record

**Notes**

* Look for matching records with last name, first name, DOB or address or mobile telephone number – allow for minor spelling mistakes
* If in doubt of matching mother record – ‘Create client’ record
* If at a later date the mother confirms she has other children, duplicate records must then be merged – see ‘[Merging duplicate records](#_Merging_duplicate_records)’

**Process**:

1. Open a ‘Duplicate tab’ (see [Appendix 2.13](#_2.13_Duplicate_tab))
2. Select the ‘Search’ button
3. Enter matching mother record client identifier number in appropriate field (see [Appendix 2.14](#_2.14_Client_Identifier))
4. Select ‘Search’ button
5. Select mother record client identifier number to view record
6. If mother record is in another Council – see ‘Transfer records in’
7. Ascertain if the mother record is a childhood record and if so, close the record using the closure reason Childhood Record. Place note in the Summary Page edit screen DO NOT USE CHILDHOOD RECORD
8. If not a childhood record
9. Update mother contact details – see ‘Update details’
10. Add or edit mother address – see ‘Add or edit address’ (see Appendix 1.13)
11. Do not change any other family member addresses prior to ascertaining at the first contact with mother that all family members are at the address on the Birth Notification.
12. Open, assign or edit site for mother record – see ‘Open for Universal MCH Service and assign or edit site’
13. Close the ‘Duplicate tab’ (see Appendix 2.13)
14. On main tab, select mother record by selecting radio button next to client identifier number
15. Select ‘Create relationship’ button
16. In ‘Relationship Details’ pop-up box:
	* + Related client or contact: Select ‘Mother’ from look-up list (see [Appendix 2.12](#_2.12_Related_client))
		+ Birth mother? Select ‘Yes’
		+ Information sharing (required): Select ‘Yes’
		+ Primary caregiver: Select checkbox, and tick contactable.
17. Select ‘Save’ button

### Professionals

Not required to enter at this time.

### Family customs

Not required to enter at this time.

### Additional needs

Enter data fields using look-up list (if known).

### Child protection status

Enter data fields using look-up list or free text (if known).

### Open for Service

* Open this client for Universal MCH Service: Select ‘Yes’ (See [Appendix 1.13](#_1.13_Open_for))
* Site (required): Select from look-up list (see [Appendix 2.11](#_2.11_Site))
* Select ‘Save’ or save as button (see Appendix 1.9).

**The client (child) will now appear in the Birth notifications list.**

## If there are multiple matching mother records

**Notes**

* Look for matching records with last name, first name, DOB or address – allow for minor spelling mistakes
* If in doubt of matching mother record – ‘Create client’ record
* If at a later date the mother confirms she has other children, duplicate records must then be merged – see ‘[Merging duplicate records](#_Merging_duplicate_records)’

**Process**:

1. Open a ‘Duplicate tab’ (see [Appendix 2.13](#_2.13_Duplicate_tab))
2. Select the ‘Search’ button
3. Enter matching mother record client identifier number in appropriate field (see [Appendix 2.14](#_2.14_Client_Identifier))
4. Select ‘Search’ button
5. Select mother record client identifier number to view record
6. If mother record is in another Council – see ‘Transfer records in’
7. Ascertain if the mother record is a childhood record and if so, close the record using the closure reason Childhood Record. Place note in the Summary Page edit screen DO NOT USE CHILDHOOD RECORD
8. If not a childhood record Merge mother records –see ‘Merging duplicate records’. Repeat ‘Transfer records in’ if there are multiple mother records in other Councils.
9. Update mother contact details – see ‘Update details’
10. Add or edit mother address – see ‘Add or edit address’ (see Appendix 1.13)
11. Open, assign or edit site for mother record – see ‘Open for Universal MCH Service and assign or edit site’
12. Close the ‘Duplicate tab’ (see Appendix 2.13)
13. On main tab, select mother record by selecting radio button next to client identifier number
14. Select ‘Create relationship’ button
15. In ‘Relationship Details’ pop-up box:
	* + Related client or contact: Select ‘Mother’ from look-up list (see [Appendix 2.12](#_2.12_Related_client))
		+ Birth mother? Select ‘Yes’
		+ Information sharing (required): Select ‘Yes’
		+ Primary caregiver: Select checkbox and tick contactable
16. Select ‘Save’ button

### Professionals

Not required to enter at this time.

### Family customs

Not required to enter at this time.

### Additional needs

Enter data fields using look-up list (if known).

### Child protection status

Enter data fields using look-up list or free text (if known).

### Open for service

* Open this client for Universal MCH Service: Select ‘Yes’ (See [Appendix 1.13](#_1.13_Open_for))
* Site (required): Select from look-up list (see [Appendix 2.11](#_2.11_Site))
* Select ‘Save’ button (see [Appendix 1.9](#_1.9_Save_and)).

**The client (child) will now appear in the Birth notifications list.**

## Transfer Records In

In the ‘Duplicate tab’:

1. Select ‘Search’ button
2. Enter or paste Client Identifier Number in appropriate field (see [Appendix 2.14](#_2.14_Client_Identifier))
3. Select ‘Search’ button
4. Select Client Identifier Number to view mother record

If already viewing mother record – In ‘Transfer Client’ screen:

* Transfer reason (required): Select ‘Changed Municipality’ from look-up list
* Receiving site… ‘Override’: Select site from look-up list (see [Appendix 2.11](#_2.11_Site))
* ‘Cancel client appointments’: Always chose Cancel appointments.
* ‘Comments’: Enter in free text field. Example: ‘Birth Notification received for newborn, DOB [date].’
* Any current Program enrolments will be listed on the screen. These enrolments will end upon transfer. Make a note of any actions to be taken regarding Program enrolments with your service provider.
* Select ‘Transfer client to my Council’ button

Return to appropriate step in process and continue.

### If client record transferred in from a CDIS Council and not the correct client

If a client record has been transferred in error, and needs to go back to the original council, you will need to contact that council and ask them to take the record back using the Transfer In process.

**Important: It is not permitted to “push” a client record to another provider, even if the record was moved in error, or for a temporary reason.**

## Merging duplicate records

**Write down the Client Identifier Numbers of the records that are duplicates**

**Notes:**

* Identify if there are duplicate records by running a search
* Provided the last name, first name and DOB are the same you should merge the records unless the records pertain to the client as a childhood record.
* Always transfer the adult records into your Council and ascertain if they are childhood records or not.
* If in doubt, contact the mother and clarify details to determine whether the records relate to them.

In the main tab:

1. Highlight and copy the Client Identifier Number of the most recent record
2. Write down the Client Identifier Number of the duplicate records

In the ‘Duplicate tab’:

1. Select ‘Search’ button
2. Paste Client Identifier Number in appropriate field (see [Appendix 2.14](#_2.14_Client_Identifier))
3. Select ‘Search’ button
4. Select Client Identifier Number to view the record
* ‘Client Details’
* ‘Merge’
* Matching Client Details: Select ‘Search’ button
* Enter Client Identifier Number of the duplicate record (that is, with the previous address or details)
* Select ‘Search Button’
* Select Client, by clicking on radio button next to Client Identifier Number
* Select ‘Use client’ button
1. Check that it is the relevant matching record - Must have at least three matches:
* First name
* Family Name
* DOB
* Mobile number
* Language
1. Select ‘Merge, keep current client’ button
2. Select ‘OK’

In ‘Merge Demographics Screen’:

1. Select ‘Use’ button to save information to main record – this will then be highlighted in green
2. Select ‘Complete Merge’ button
3. Select ‘OK’ – ‘Successfully Merged’ (see [Appendix 1.12](#_1.12_Merging_–))

Return to appropriate step in process and continue.

## Update details

Check contact details and address on birth notification is on CDIS record and update if required.

In the ‘Duplicate tab’

1. View mother record
2. ‘Client Details’
3. ‘Update Client Details’
4. **Do not update** any other clients associated with the mother’s addresses as the address histories will be lost in those other records.

### Other details

Enter data fields using look-up list or free text (if known) (see [Appendix 1.8](#_1.8_Reminders_and)).

Ensure phone numbers are entered as displayed on birth notification. Phone numbers should include area code and no spaces between digits. For example, 0391231234 (home or work) and 0410111222 (mobile). The mobile number must be inputted into the mobile field as this field is used for generating the SMS contact number

* Appointment reminders (required): Select ‘SMS’
* Receive letters (required): Select ‘Email’.
* Select ‘Save’ button
* Select ‘OK’ – ‘Successfully Saved’

Return to appropriate step in process and continue

## Add or edit address

In the ‘Duplicate tab’

1. View mother record
2. ‘Client Details’
3. ‘Client Addresses’

### Client or contact addresses

#### Different address – new address needs to be added

1. Select ‘Add Address’
2. In ‘Add Address’ pop-up box:
	* + Source (required): Select ‘by Birth Notice’ from look-up list
		+ Address type (required): Select ‘Home’ from look-up list
		+ Enter data fields using look-up list or free text (see [Appendix 2.9](#_2.9_Address_–))
		+ Suburb (required): Enter first 3 letters and select from look-up list (see [Appendix 1.7](#_1.7_Suburb))
		+ Start date: Defaults to today’s date (see [Appendix 2.3](#_2.3_Birth_date))
		+ End date: Leave blank
		+ Select ‘Primary Address’ checkbox
		+ Select ‘Save’ button
3. In Add address ‘Relationships’ pop-up box:
	* + **Do not select** any check boxes and if confirmed by the mother update each other family member record individually as address history will be lost
		+ Select save button
		+ Select ‘OK’ – ‘Successfully saved’

#### Address needs editing (minor adjustments)

Only if minor adjustments such as incorrect house number, street spelling and so on.

1. Select the pencil icon next to the relevant address
2. In the ‘Add address pop-up box:
	* + Source (required): Select ‘by Birth Notice’ from look-up list
		+ Address type (required): Select ‘Home’ from look-up list
		+ Enter data fields using look-up list or free text (see [Appendix 2.9](#_2.9_Address_–))
		+ Suburb (required): Enter first 3 letters and select from look-up list (see [Appendix 1.7](#_1.7_Suburb))
		+ Start date: Defaults to today’s date (see [Appendix 2.3](#_2.3_Birth_date))
		+ End date: Leave as default (‘1/01/9999’)
		+ Ensure ‘Primary Address’ checkbox is ticked
		+ Select ‘Save’ button
3. In the Add address ‘Relationships’ pop-up box:
	* + **Do not select** any check boxes and if confirmed by the mother update each other family member record individually as address history will be lost
		+ Select save button
		+ Select ‘OK’ – ‘Successfully saved’

Return to appropriate step in process and continue.

## Open for Universal MCH Service and assign or edit site

**All children under 6 years old and primary caregivers are to be open for universal MCH service**

See [Appendix 1.13](#_1.13_Open_for).

In the ‘Duplicate tab’

* View Mother Record
* ‘Client Details’
* ‘Open/Change/Close Client’

Current service summary should display:

* Service: Universal MCH Service
* Site: [site]
* Date opened: [date time]
* Date closed: blank

### If record not open

Select client details and then ‘Open/Change/Close’

In the ‘Open/Change/Close’ pop-up Box:

* + - Site (required): Select from look-up list (see [Appendix 2.11](#_2.11_Site))
		- Reason (required): Select ‘Re-establish MCH Service’ from look-up list
		- Select ‘Save’ button

### If site is to be assigned or edited

Select client details and then ‘Open/Change/Close’

In the ‘Open/Change/Close’ pop-up Box:

* + - Change: Selected by default
		- Site (required): Select from look-up list (see [Appendix 2.11](#_2.11_Site))
		- Select ‘Save’ button

# Entering a birth notification of a stillborn

Follow the ‘Entering a birth notification into CDIS’ process (including ‘Relationships’), with **one change**:

In Birth details, select Birth status as ‘stillborn’ from look-up list. Ensure client is open to an MCH Centre.

(See [Appendix 1.14](#_1.14_Stillborn) and [Appendix 2.5](#_2.5_Birth_status))

## Close stillborn record

**Note:** It is vital to do this immediately after entering a birth notification of a stillborn

1. CDIS – Details (Child) Screen
2. ‘Client Details’
3. ‘Open/Change/Close Client’
4. Select ‘Update’ button
5. Select ‘Close’
6. For Reason (required), select ‘Stillbirth’ from look-up list
7. Select ‘Save’

**Note:** The following is a **critical** **step** to count stillbirth or deceased for reporting purposes.

1. ‘Client Details’
2. ‘Update Client Details’
3. Select ‘Deceased’ checkbox
4. Enter ‘Deceased Date’ (see [Appendix 2.3](#_2.3_Birth_date))
5. Enter ‘Deceased Notes’ in free text field – that is ‘Stillborn @ [gestation].’
6. Under ‘Aboriginal/TSI’ (required), select ‘Not stated/inadequately described’ from look-up list unless otherwise stated
7. Under ‘Health Care Card’ (required), type ‘unknown’ in free-text field unless otherwise stated
8. Select’ Save’ button

## Close mother record of stillborn

Note: Only if first time mother and not currently receiving MCH service and birth notification does not request MCH contact with Mother. ‘Client Details’

1. ‘Client Details’
2. ‘Open/Change/Close Client’
3. Select ‘Update’ button
4. Select ‘Close’
5. Under ‘Reason’ (required), select ‘Primary Care Giver of stillborn/deceased child’ from look-up list
6. Select ‘Save’ button

## Record contact with mother of stillborn

**Note:** This can be recorded after record closed

Follow internal council process for responding to stillborn birth notification. If in contact with the mother or hospital or professional, record as follows.

1. ‘Clinical Activity’
2. ‘Client not Present’
	* + Service date: Auto-filled with today’s date (see [Appendix 2.3](#_2.3_Birth_date))
		+ Start time: Auto-filled with current time
		+ Agency: Mother – leave blank **or** select agency or hospital from look-up list
		+ Duration: Use digits or arrows
		+ Travel time: Leave blank
		+ Service type: Select ‘Telephone Consultation’ from look-up list
		+ Location: Leave blank
		+ Others involved: Type in free-text field if relevant
		+ Professionals: Select from look-up list (linked to client), Select Add if relevant
		+ Notes: Enter notes from telephone consultation in free-text field
3. Enter further notes in ‘Stillborn Child History/Notes’ or ‘Mother History/Notes’ if relevant:
	* + CDIS – Details (Child) Screen **or** CDIS – Details (Mother) Screen
		+ ‘History/Notes’
		+ ‘Notes’
		+ Select ‘Add Note’ button
		+ In the ‘Add/Edit Progress Note’ pop-up box, type notes in the free-text field
		+ Select ‘Save’ button

# Birth notifications list

The birth notification list is an efficient way to track:

* birth notifications
* outstanding home visits
* attempts at contacting mother
* date set to re-attempt to contact mother

This list can be viewed by ‘All’ (all sites in your Council) or by ‘Site’ (a specific ‘site’ in your Council).

All clients that have been recorded as received a birth notification and have not yet been offered a home visit are displayed on the birth notifications list.

If someone other than a newborn is on the birth notification list, the person was incorrectly created first and not through the **child** relationship that is the MCH CDIS process **and** that on the ‘Create Client/Contact’ screen, ‘Birth Notification’ was selected as ‘Yes’.

This ‘birth notification’ relates to the child’s birth notification (not the mother) and cannot be undone

The only way to take someone off the birth notification list who is **not a newborn** is via the following process.

## Remove a client who is incorrectly on the birth notification list

1. Home Screen
2. ‘General’
3. ‘Birth Notifications List’
4. Site: Select All or specific site from look-up list
5. Select ‘Search’ button
6. Select ‘Single’ (to remove one) or select ‘Multiple’ (if there are more than one)
7. Select client to remove, by selecting checkbox
8. Select ‘Confirm Multiple Offer’ button, if relevant
9. Select ‘Yes’ in ‘Confirm Multiple Offer’ pop-up box
10. Date of attempt (required): Select the down arrow to view the calendar box and select ‘Today’
11. Select the down arrow to select AM or PM
12. Appointment offered (required): Select ‘No’
13. In the free-text field, type ‘Incorrect data entry on Birth Notifications List - moved to Universal Active List’
14. Duration (required): Select the down arrow to select 1 minute
15. Outcome (required): Select ‘Move clients listed above to ACTIVE LIST – no appointment’

# Appendix 1: Notes

## 1.1 General

All fields with a red asterisk (\*) are mandatory fields and must be completed before saving.

Use the tab keys to quickly move through the fields.

## 1.2 Creating a client record

A client record can only be created if a ‘State’ search has been performed first.

## 1.3 Newborn name

To be entered this way to accurately identify the newborn on the Birth Notification and to ensure that the child is not entered twice if the last name is common.

For Twins:

* BB Twin One of [Mother’s first name], such as ‘BB Twin One of Nicole’
* When twin babies’ first names are known, remove ‘Twin One’ and ‘Twin Two’.

**Do not use** any symbols or numbers in name fields (such as: \* # 1).

## 1.4 Prematurity

This can be entered at any time via ‘Update Client Details’ (found in client details of ‘Client (CHILD) Record’).

Adjusted age is displayed in the client record header.

## 1.5 First time mother

If recorded at time of creating the ‘Client (CHILD) Record’, the first-time mother checkbox will be automatically ticked in Pregnancy and delivery (found in ‘History/Notes’).

This can be entered at any time in the Pregnancy and delivery area.

It is from the Pregnancy and delivery area that the first-time mother is counted for reporting purposes.

## 1.6 Birth notification

If yes’ – the client (child) will appear on the birth notifications list and is counted for reporting purposes.

If no – if a birth notification is NOT received:

* select Reason: Born interstate or Born overseas or Other if unsure where child was born
* birth details fields will not appear
* client (child) will not appear on the birth notifications list

If the birth notification has an address located within another Council and **not** in your Council – return it to the hospital and contact the relevant Council

**Note**: **Do not** create new client on CDIS if birth notification is **not** in your Council

This does not apply if after a CDIS record was generated the family confirm that they have relocated to another Council area.

If this occurs DO NOT transfer the client to another Council, contact the new Council, update the new address and the new Council will ensure that they transfer the client into their Council.

## 1.7 Suburb

The suburb list may take a little while to load as it is a national list.

Take care in selecting the correct suburb as it is a national list.

## 1.8 Reminders and letters

Contact details are displayed if birth date entered for the created client is under 6 years of age.

Ensure mobile number and email address are entered correctly so that correspondence such as appointment reminders, group invitations and referral letters can be sent

Even if your council is not sending correspondence via email or reminders via SMS at present, it is important to enter these fields as your council may do so in the future or the client may transfer councils.

## 1.9 Save and open

* ‘Save’: If the created client record is completed, this saves the record and returns to the ‘Home’ screen
* ‘Save and Open’: The created client record will be saved, and the record will remain in view
* Once a client record is ‘saved’ this initial ‘CDIS – Create Client / Contact Screen’ cannot be re-visited

## 1.10 Transfer In

**Do not** transfer in other relationships (such as other caregiver or siblings) into your Council without the mother’s or primary caregiver’s permission.

## 1.11 Merging

Always merge the Mother first before merging any children.

Where details in the main record do not match the duplicate record, they are displayed highlighted in green. Often this is up-dated information, such as mobile number. It is possible to copy the old mobile number as it may still be a valued contact number for the family. It can be placed in the home phone spot.

Decide which information is to be kept on the main record – confirm with the client before merging if unsure. This could be information in the duplicate record which is not included in the main record or information on the duplicate record that is correct.

The information highlighted in green will be saved to the main record.

## 1.12 Merging – ‘Relationships’

When the merge is completed, other clients or contacts may appear in ‘Relationships’.

It is possible to delete the relationship by clicking on the red X icon. This only deletes the relationship and not the CDIS record (which still remains on the system).

Deleted relationships can be viewed by selecting the ‘Show deleted relationships’ checkbox in the Relationships screen

In the Relationships screen, two or more records for the same client or contact may also appear. In this case, it is important to merge the records as part of data cleansing.

**Do not create or link** relationships (such as other caregiver or sibling) without the mother’s permission.

## 1.13 Open for Universal MCH Service

**Note:** Only **open** records are counted for reporting purposes – if they aren’t open, they won’t get counted!

Records that should be open include:

All children under 6 years old

All primary caregivers

**Anyone** who is actively receiving an MCH service – then close when the episode of care or service is finished

* a caregiver record would be open if they have been referred by MCH (which is recorded from the 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
* note – primary caregivers’ records **always** remain open

Be sure to **open** all children under six years old and primary caregivers whose records have been:

* transferred in
* merged records

## 1.14 Stillborn

**Note:** It is **vital** to first create client (child) for stillborn birth notification, add mother, assign site and open

* then close client record via ‘Open/Change/Close’ and record deceased in ‘Update Details’.

When ‘Update Client Details’ is completed, (deceased) will appear in the client details header

* ‘Warning: This client is deceased’ is also displayed at the top of the client details summary page

To date, the system continues to calculate the child’s age regardless if they are stillborn or deceased.

Clients who are recorded as stillborn or deceased and who are closed, will be displayed in the search results and in ‘Contacts/Relationships’ as greyed out, in italics and highlighted in yellow.

Clients who are recorded as stillborn or deceased and closed will not appear on the birth notifications list.

# Appendix 2: Tips and shortcuts

## 2.1 Last name – ‘copy’

Copying the last name enables the name easily to be inserted correctly where required

To copy, highlight the last name, right click then select ‘copy’ or use CTRL + C on your keyboard.

## 2.2 Last name – ‘paste’

Pasting the last name avoids typing errors with spelling of the client’s last name. Copy the client’s last name and paste by right clicking in the desired field and selecting ‘paste’ or Ctrl + V using your keyboard.

## 2.3 Birth date or date

Override a default date by deleting and enter using digits or calendar box

For a recent date (such as a child’s date of birth), select the down arrow so the calendar box is displayed, then select the relevant date.

Where calendar box is not available, enter numbers for day month year, then select Enter. For example, to enter 1 January 1987, type 1 1 87 then select Enter. This automatically populates as ‘01/01/1987’.

It is usually quicker to enter an adult’s date of birth manually

## 2.4 Gender

Enter M for male and F for female, , I for Intersex/Indeterminate and N Not Stated/Inadequately Described/Unknown

## 2.5 Birth status

Enter L for liveborn and S for stillborn.

## 2.6 Full-term or premature

Enter F for full term and P for premature.

## 2.7 Singleton or multiple

Enter S for singleton and M for multiple.

## 2.8 Special care nursery

Enter S for special care nursery.

Enter N for neonatal intensive care unit.

## 2.9 Address – tip

To easily view a unit address, enter both the unit number and house number in the house number field. A unit number can be entered in the ‘Complex/Unit Number’ field, however it not displayed clearly this way. For example: House number: Unit 1/25-27.

If the street type is not in the look-up list, include the street type in the street name free text field and leave the street type field blank.

## 2.10 Address – Short Cut

**Note:** Following this process does **not** keep the old or existing address on the client addresses screen – it deletes it and replaces it with the new/current address. This is a problem for keeping record or track of history of addresses.

In the child record, enter address as displayed on birth notification.

Create relationship with mother – for mother’s address, **only** enter suburb.

On child record, go to ‘Client Details’ then ‘Client Addresses’

To update the address:

1. Select the pencil icon next to the address
2. In the ‘Update Address’ pop-up box:
	* + ensure address is same as that on the Birth Notification – do **not** edit anything else
		+ ‘Primary Address’ checkbox is selected by default – **do not alter**
		+ Select ‘Save’
3. In the ‘Update Address; Relationships’ pop-up box:
	* + Do not select mother by selecting the checkbox
		+ Manually update address in Mother record
4. Select ‘OK’ – ‘Successfully saved changes’

**Note**: This process can be followed for adding or updating all client relationships however **for birth notifications** it is important **only** to update the mother’s address as displayed on the birth notification until confirmation that the other relationships need their address updated as well.

To ensure that address history for all members of the family is maintained, you are required to manually update each person’s address to maintain the address history.

## 2.11 Site

Type the first initial of the Council site, then select the appropriate site from look-up list (if more than one site is listed).

## 2.12 Related client or contact

Enter: M for mother.

## 2.13 Duplicate tab

To open a duplicate tab, right-click on the CDIS tab in your web browser and select ‘Duplicate tab’ or use Ctrl + K on your keyboard (use Alt + D then Alt + Enter in Chrome or Firefox).

To close, select the x on the duplicate tab or use Ctrl + W on your keyboard.

## 2.14 Client Identifier Number

A ‘State’ search does not need to be performed if the Client Identifier Number has been entered.

Entering the Client Identifier Number is usually easier and quicker than typing in search fields.

## 2.15 Other client identifiers

Record other identifiers, such as a Hospital UR (enables easy handover if baby in hospital or SCN):

1. In ‘Client Details go to ‘Update Client Details’
2. Go to other identifiers and select the add icon (green plus)
3. In the ‘Edit Person Identifier’ pop up box:
	* + Identifier type (required): Select from look-up list
		+ Identifier: Enter identifier (followed by agency or hospital) in free text field
		+ Select the ‘Update’ button
4. Select the ‘Save’ button
5. Select the pencil icon to edit or the red X icon to delete
6. Displayed on client ‘Summary page’

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